Employment Land Study Refresh

Ribble Valley Borough Council

Final Report

May 2013

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EXECUTIVE SUMMARY

Introduction

i) This report assesses the supply, need and demand for employment land and premises (use class B) in Ribble Valley. It has been carried out for Ribble Valley Borough Council to provide robust evidence to underpin and inform its Local Plan for the period to 2028. This report comprehensively reviews and updates the employment land and premises research of the existing Employment Land and Retail Study, which dates from October 2008. There are five main elements to this study:

- An assessment of the Borough's economy that informs the amount, location and type of employment land and premises required to facilitate its development and growth
- A review of the current portfolio of employment land and premises
- Identification and appraisal of additional potential employment land which could be used to meet the Borough's future land needs
- An assessment of the potential impact of major public and private sector development proposals, notably the Enterprise Zone at Samlesbury
- Recommendations on the future allocation of employment land and premises to maintain the Borough's economic growth.

Methodology

ii) A number of research methods have been used – site visits, interviews with property market stakeholders and a survey of 200 businesses (of which 102 responded). This has been combined with extensive consultation with public sector agencies involved in the Borough (and in neighbouring local authority areas) as well as with BAE Systems, a key employer in Ribble Valley. Desktop analysis of existing strategies, reports and documents has also been used to inform the overall findings. The 42 Parish and Town Councils of the Borough have also been contacted by post and email. The methodology follows ODPM guidance on the production of employment land reviews.

Findings

iii) The least deprived local authority area in Lancashire, Ribble Valley is affluent with a highly skilled population. This is evidenced by the high proportions of people who work in managerial and professional occupations in the Borough. The population is relatively mobile and Borough is a net exporter of labour to the rest of Pennine Lancashire, Preston and the Manchester City Region.

iv) Property professionals argue that there is an oversupply of both office and industrial property in the Borough. There is also little inward investment. However, Ribble Valley's rural business centres are performing well at present. Schemes such as the Manor Court, Ribchester and Time Technology Park, have wide catchment areas for occupiers. Demand is for office suites of less than 50 sqm and industrial units of up to 1,000 sqm.

v) In the short/medium term, low land values and a lack of demand is encouraging the landowners of Barrow Brook Business Park to seek higher value uses on their land. However, owners are also seeking planning permissions for B1, B2, B8 uses. This is evidence that employment development can, in the long term, still be brought forward at this location.

vi) Ribble Valley is bordered by nine other local authorities. Most have few direct links with the Borough and none expect to have to look to Ribble Valley to meet any shortfalls in employment land or premises supply. In Burnley, the former Michelin tyre warehouse will be promoted as an advanced manufacturing/engineering park for aerospace companies. This may compete with the Samlesbury Enterprise Zone. Preston City Council is committed to support the development of Longridge and is considering the provision of employment land off Whittingham Road.

vii) Neighbouring authorities are supportive of the Enterprise Zone proposals at Samlesbury Aerodrome. However, most do not feel they will derive much economic benefit from this specialist scheme which is distant from their main settlements.

Employment Land Supply

viii) At 31st March 2012 there was a headline supply of 20 ha of available employment land, made up of 12 sites. 61 percent of this (12.27 ha) comprises land at Barrow Brook Business Park, and represents medium and long term supply. At Barrow Brook, the 4.32 ha Papillion Site (2) site has outline permission for housing. If this is excluded then there is only 15.68 ha (11 sites).

ix) An additional 3.73 ha is required based on long term past take-up rates. This increases to 8.05 ha when measured against the worst case scenario. If short term take-up rates are used, then the land need increases to almost 11 ha (see Table ES1).

Table ES1 – Land Forecast Models Reflecting Perceived & Residual Supply

Model	Land Need, ha 2012-2028 (including 5 years Buffer)	Perceived Surplus (Shortfall) to 2028 Headline Supply (20.00 ha)	Predicted Surplus (Shortfall) to 2028 Realistic Supply (15.68 ha)
Long Term Land Take-up	23.73	(3.73)	(8.05)
Short Term Land Take-up	26.46	(6.46)	(10.78)
Employment Based	6.75/10.55	9.45/13.25	5.13/8.93
Labour Supply	9.05/10.55	10.25/10.95	5.93/6.63
Policy 'On' (linked to Enterprise Zone) Employment Based	28.60/30.31	(8.60/10.31)	(12.92/14.63)
Policy 'On' (linked to Enterprise Zone) Labour Supply	19.75/21.40	0.25/(1.40)	(4.07/5.72)

Source: BE Group 2013

x) The 'policy on' models also indicate shortfalls of up to 14.63 ha. However these relate land requirements which will be met within the Enterprise Zone and are not part of Ribble Valley's general employment land supply.

xi) The other forecast models (employment and labour supply) suggest the Borough has an oversupply of employment land. This would suggest that much of the current land supply is surplus to requirements and could be used for other activities. However, these methods take no account of pent-up demand, failures in the property market or need for a range of sites and locations to provide companies with choice; a five year buffer to ensure a continuum of supply beyond the Plan period. They are frequently contradicted by empirical evidence generated by this study.

Recommendations

xii) This report has had full regard to the requirements of the NPPF to encourage and deliver growth through the planning system. The key recommendations are:

- That the Council should adopt the short term land take-up scenario. This suggests that the Borough requires another 8 ha of employment land, to 2028.

- That the Council explore the feasibility of bringing forward new allocations in Longridge (considering sites at College Farm and to the rear of Sainsbury's) and in the Clitheroe area (at Standen and Salthill).
- The Council should designate six key employment sites and areas to be safeguarded for B Class Uses and other employment uses which achieve economic enhancement. These align to the NPPF description of 'key employment sites' and are:
    - Barrow Brook Business Park, Barrow
    - Samlesbury Aerodrome
    - The Sidings, Whalley
    - Salthill Industrial Estate, Clitheroe
    - Shay Lane Industrial Estate, Longridge
    - Time Technology Park, Simonstone.
- Within these 'key employment sites' non – B Class employment uses should only be allowed if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses.
- For Ribble Valley's remaining employment areas, a more flexible approach could be taken to help facilitate a broad range of economic development. In some cases a more intensive mixed-use development could provide greater benefit to the local community than if the site was retained solely in employment use.
- Employment development outside Employment Areas makes a contribution to local employment activity and jobs. Any consideration of future non-employment use, in such locations, should be addressed in the same way as non 'key employment' sites.
- The Council should work with neighbouring authorities on issues in which interests will overlap, notably capitalising on the supplier chain and production spin off opportunities generated by the Samlesbury Enterprise Zone.
- Review and monitor the employment land and premises position and undertake the study again in about three years, as 2028 is a long time in the future and much will happen before then.

1.0 INTRODUCTION

1.1 This report provides an employment land and premises review for the Borough of Ribble Valley (the Borough). It has been carried out on behalf of Ribble Valley Borough Council (the Council).

1.1 The Study has been commissioned provide robust evidence to underpin and inform the Council's Local Plan. The Study will analyse employment land and premises demand, supply and need to 2028.

1.2 BE Group, economic development and property consultants based in Warrington, has compiled this report. BE Group also carried out the Council's existing Employment Land and Retail Study which dates from October 2008. This report reviews and refreshes the employment land and premises research undertaken within that 2008 study (but not the retail capacity and market town health check elements). In particular, it takes account of recent planning policy changes such as the introduction of the National Planning Policy Framework (NPPF) and the changing economic situation since the Employment Land and Retail Study was completed.

1.3 This research has been undertaken following the Ribble Valley Core Strategy Public Examination of October/November 2012. In that examination, the Inspector highlighted the need for the Council to update the Core Strategy evidence base documents, including the 2008 Employment Land and Retail Study.

1.4 The Study comprises five main elements:

- An assessment of the Borough's economy that informs the amount, location and type of employment land and premises required to facilitate its development and growth
- A review of the current portfolio of employment land and premises
- Identification and appraisal of additional potential employment land which could be used to meet the Borough's future land needs
- An assessment of the potential impact of major public and private sector development proposals, notably the Enterprise Zone at Samlesbury
- Recommendations on the future allocation of employment land and premises to maintain the Borough's economic growth.

Background

1.5 This Employment Land and Premises Review will form part of the evidence base for policies and proposals in the Ribble Valley Local Plan. As part of the plan preparation process, the Council is required to review and assess the level and quality of its existing employment sites and premises to help ensure an adequate supply of appropriate sites has been identified over the plan period.

1.6 Land and premises need to reflect the changing requirements of businesses and local economies. The Study will therefore help assess the suitability of sites, indicating which sites might be best safeguarded for employment uses, any sites that appear no longer suitable for employment uses at least in their present form, and any need for new allocations. Planning policies are intended to intervene in the market to ensure amongst other things an appropriate balance between housing and employment uses in the Borough. And whilst the drive to deliver more housing is important, it should not be at the expense of losing important sites that could contribute to local economic development. However, as well as securing sustainable development for employment purposes, a realistic view is taken of the operation and vitality of the market.

1.7 The Study covers all industrial, warehousing and distribution uses, as well as offices. It does not refer to all uses that provide jobs, but to the above group of uses, which tend to share certain locational and physical characteristics. The Study is primarily concerned with those uses included within the planning Use Class B – B1 (business offices/light industrial), B2 (general industrial) and B8 (storage and distribution) and appropriate sui generis uses including recycling and the environmental industry. However, the land needs of non B-class employment uses, included within the NPPF definition of 'economic development', are briefly considered in Section 9.0.

1.8 Recognising the rural nature of the Borough the study also has regard to the rural economy, and specifically opportunities for diversification of agricultural buildings into B Use Class accommodation.

Methodology

1.9 Research methods used include site visits, face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents. A survey of 200 local businesses (online and by post, with follow-up telephone calls) has been undertaken and the 42 Parish and Town Councils of Ribble Valley have also been contacted by post and email.

1.10 Consultations were undertaken with a number of the Borough's major private sector employers and key public sector agencies, including Lancashire County Developments Ltd and the Lancashire Local Enterprise Partnership (LEP). Desktop analysis of national, regional and local reports and strategies has also been undertaken.

1.11 The property market in the local authority areas adjacent to Ribble Valley was also reviewed. This has been undertaken through consultations with officers from the relevant Councils, combined with desktop analysis of the Employment Land Studies and Core Strategies of those local authorities. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on the Borough's land and property market.

1.12 Finally the land supply has been assessed against forecast data to understand future land need. This is then developed into a series of economic development recommendations that cover not just land, but also premises.

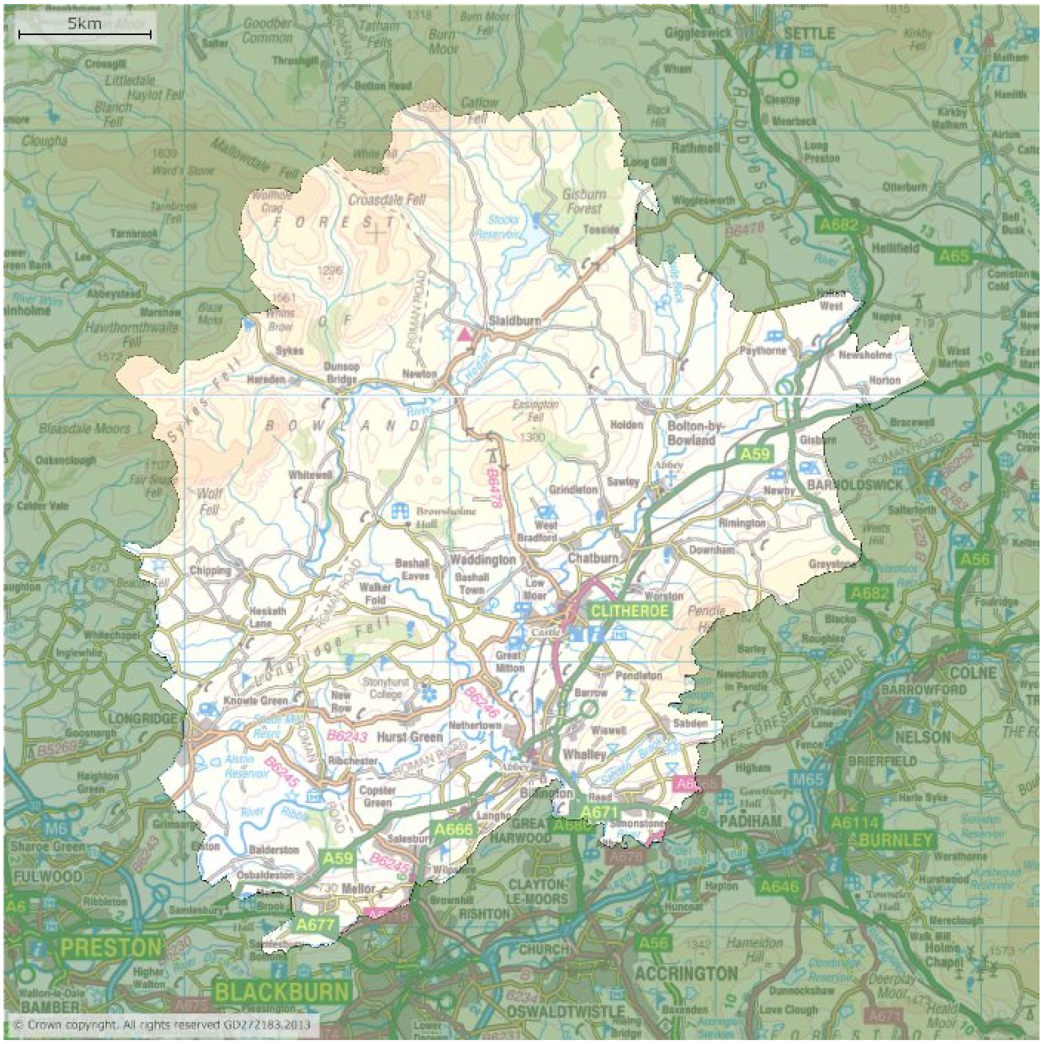
1.13 At Appendix 1 we have included a schedule of all consultees.

Study Area

1.14 Ribble Valley (population 57,132, as of the 2011 Census) is a largely rural area covering 226 square miles in the east of Lancashire (see Figure 1). To the south it is bounded by the M65 and conurbation of Blackburn, Burnley and Central Lancashire towns. It comprises numerous picturesque villages, but the key settlements are Clitheroe, Longridge and Whalley. The north of Ribble Valley reaches as far north as Lancaster to the west and Yorkshire to the east.

1.15 Employment is focused in and around the main towns of Clitheroe, Longridge and the A59 corridor. Key employment areas include Shay Lane Industrial Estate (Longridge), Salthill Industrial Estate and Link 59 (Clitheroe) and Time Technology Park (Simonstone). Key employers in Ribble Valley include BAE Systems, Hanson, Ultraframe, Dugdale Nutrition, Total Foods and Johnson Matthey.

Figure 1 – Ribble Valley



Source: ONS 2013

Employment Land Review: Guidance Note (ODPM 2004)

1.16 The Employment Land Review: Guidance Note promotes a three-stage process, and provides the framework for this study. Although this document is now nine years old it has not been amended or superseded by more recent statements of policy and remains the only national guidance document for the production of Employment Land Studies. It has been recommended for retention (until superseded) in the 2012 Taylor Review of Planning practice guidance.

1.17 Stage One: take stock of the existing situation including an initial assessment of 'fitness for purpose' of existing allocated employment sites. The objective is to identify the best employment sites to be protected; identify employment sites to be released and prepare an effective brief for stages two and three of the review. The outcome of this stage is to understand key employment land supply issues and generate a portfolio of potential employment sites to take forward for more detailed review.

1.18 Stage Two: understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of 'gaps' in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the Local Plan period and an analysis of the likely 'gaps' in supply that need to be filled.

1.19 Stage Three: entails a qualitative review of all significant sites (and premises) in the existing portfolio in order to confirm which of them are unsuitable for/unlikely to continue in employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. The outcome will be the completion of the employment land review, to be taken forward in the Local Plan. The Ribble Valley Employment Land Review Refresh is prepared in compliance with this advice.

1.20 Table 1 shows how this report aligns with, and answers the requirements of the ODPM guidance. The link between the report and the ODPM steps is not always clear cut, with different sections overlapping, indeed certain steps overlap. It should be noted this report reflects adaptation (and improvement) of the ODPM guidance in order to address the requirements of the brief and the particular local circumstances of the Borough's property market.

1.21 In line with the guidance the study covers, very broadly, all the employment property market segments and types of sites outlined in it (see Table 2). To keep the report simple, the research combines most of these requirements into three broad areas: employment land, office premises and industrial properties.

Table 1 – Employment Land Reviews – Guidance Note

Stage 1 – Taking Stock of the Existing Situation	
Step 1 – Devise Brief	Prepared by Ribble Valley Borough Council
Step 2 – Collate Data on Land Stock and Revealed Demand	Land Stock covered in Section 6 Revealed Demand covered in Sections 4, 5, 6 and 8
Step 3 – Devise and Apply Site Appraisal Criteria	Site Appraisals covered in Section 6 and Appendix 4-6
Step 4 – Undertake Preliminary Site Appraisal	Site Appraisals covered in Section 6 and Appendix 4-6
Step 5 – Confirm Brief for Stages 2 & 3	Agreed in study progress meetings
Stage 2 – Creating a Picture of Future Requirements	
Step 6 – Understand Market Areas and Segments	Covered in Sections 3, 4, 5, 6, 7, 8 and 9 Relationship with neighbouring areas covered in Section 7
Step 7 – Select and Apply Suitable Forecast Model/Demand Analysis	Covered in Section 9
Step 8 – Quantify Employment Land Supply	Covered in Section 6
Step 9 – Translate Employment Land Forecasts to Land Requirements	Covered in Sections 9, 10 and 11
Step 10 – Scenario Testing	Covered in Section 9, 10
Stage 3 – Identifying a New Portfolio of Sites	
Step 11 – Devise Qualitative Site Appraisal Criteria	Covered in Section 6
Step 12 - Confirm Existing Sites to be Retained or Released and Define Gaps in Portfolio	Covered in Sections 6, 10 and 11
Step 13 – Identify Additional Sites	Covered in Sections 10 and 11
Step 14 – Complete Employment Land Review	Covered in Sections 6, 9, 10 and 11

Source: BE Group 2013

Table 2 – Main Employment Property Market Segments and Sites

Established or Potential Office Locations	Heavy/Specialist Industrial Sites
High Quality Business Parks	Incubator/SME Cluster Sites
Research and Technology/Science Parks	Specialised Freight Terminals
Warehouse/Distribution Parks	Sites for Specific Occupiers
General Industrial/Business Areas	Recycling/Environmental Industries Sites

Source: ODPM 2004

2.0 STRATEGIC CONTEXT

Introduction

2.1 This section focuses on national, sub regional and local reports and strategies that have a relevance to the allocation of employment land and premises. An understanding of the strategies and reports contained in this review is needed to show strategic alignment and a holistic approach to promote sustainable development. The consultants' recommendations follow the general principles set by them.

National

National Planning Policy Framework – Department for Communities and Local Government (2012)

2.2 As part of ongoing reforms of planning policy, the Department for Communities and Local Government has published the National Planning Policy Framework (NPPF). The NPPF sets out the Government's economic, environmental and social planning policies for England, articulating the Government's vision of sustainable development. It provides a framework for the production of local and neighbourhood plans, and has replaced all the previous Planning Policy Statements and Guidance Notes.

2.3 In terms of business and economic development, the NPPF argues that *"Investment in business should not be over-burdened by the combined requirements of planning policy expectations. Planning policies should recognise and seek to address potential barriers to investment, including poor environment or any lack of infrastructure, services or housing."* Local planning authorities should:

- *"Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth*
- *Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated requirements over the plan period*
- *Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate requirements not anticipated in the plan and to allow a rapid response to changes in economic circumstances*

- *Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries*
- *Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement*
- *Facilitate flexible working practices such as the integration of residential and commercial used within the same unit."*

2.4 Planning policies should also *"avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities."*

2.5 In addition to this, paragraph 51 indicates that local planning authorities *"should normally approve planning applications for change to residential use and any associated development from commercial buildings (currently in the B use classes) where there is an identified need for additional housing in that area, provided that there are not strong economic reasons why such development would be inappropriate."*

2.6 In town centres, local planning authorities should *"allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, community services and residential development needed."*

2.7 Planning policies should support sustainable economic growth in rural areas by taking a positive approach to new development, supporting *"the sustainable growth and expansion of all types of businesses and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings"* and promoting *"development and diversification of agricultural and other land-based rural businesses."*

2.8 The NPPF re-introduces district-wide local plans, replacing the Local Development Framework system. The Local Plan should be a single strategic document, with supplementary planning documents only created if they can help to bring forward sustainable development at an accelerated rate.

2.9 It is proposed that Local Plans will address the spatial implications of economic, social and environmental change, setting out the opportunities for development and providing clear guidance on what will, or will not, be permitted and where. The Local Plan should outline the Local Planning Authority's strategic priorities. This should include strategic policies to deliver *"the homes and jobs needed in the area"* as well as "*the provision of retail, leisure and other commercial development."*

2.10 Crucially, Local Plans should:

- *"Plan positively for the development and infrastructure required in the area to meet the objectives, principles and policies of this Framework*
- *Be drawn up over an appropriate time scale, preferably a 15 year time horizon, take account of longer term requirements, and be kept up to date*
- *Be based on cooperation with neighbouring authorities, public, voluntary and private sector organisations*
- *Indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map*
- *Allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate*
- *Identify areas where it may be necessary to limit freedom to change the uses of buildings, and support such restrictions with a clear explanation*
- *Identify land where development would be inappropriate, for instance because of its environmental or historic value; and*
- *Contain a clear strategy for enhancing the natural, built and historic environment, and supporting Nature Improvement Areas where they have been identified."*

2.11 Local planning authorities need to prepare and maintain a robust evidence base to understand business need within their area. This can be achieved by working with neighbouring authorities, LEPs and the local business community. This evidence base should be used to assess:

- *"the needs for land or floorspace for economic development, including both the quantitative and qualitative need for all foreseeable types of economic activity over the plan period*

- *existing and future supply of land available for economic development and its sufficiency and suitability to meet identified needs. Reviews of land available for economic development should be undertaken at the same time, or combined with Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land*
- *the role and function of town centres and the relationship between them, including any trends in the performance of centres*
- *the capacity of existing centres to accommodate new town centre development*
- *locations of deprivation which may benefit from planned remedial action*
- *the needs of the food production industry and any barriers to investment that planning can resolve."*

Sub-Regional Policy

Lancashire Economic Strategy Framework of Priorities – Lancashire County Council (2010)

2.12 The Economic Strategy provides an overarching framework that will direct the County Council's approach to economic development over the next three years. The framework is structured around five strategic priorities which are deemed critical to Lancashire's future economic success.

- Economic Growth, Knowledge and Innovation
- Spatial
- Skills and Employment
- Infrastructure
- Partner Development.

2.13 Under economic growth, knowledge and innovation, the priority most relevant to this Study, there are ten key objectives:

- Developing Lancashire's seven strategic development sites of regional importance to accelerate the region's growth
- Working with new Economic Development Companies to bring forward programmes to deliver sufficient sustainable growth
- Unlocking Lancashire's growth potential as a location for nuclear, renewable energy and environmental technology
- Enhancing Lancashire's competitive advantage in advanced manufacturing

- Bridging the shortfall in knowledge-based and creative sectors
- Strengthening links between Lancashire's leading companies, universities and SMEs
- Working with developers and investors to develop new business accommodation
- Strengthening linkages with major regional developments such as Mediacity:UK and the emerging Energy Coast initiative
- Improving Lancashire's visitor economy offer
- Aiming for economic growth to mitigate impacts of climate change and generate low carbon technology innovations to create a carbon neutral economy.

2.14 The County Council aspires to work with its Multi-area Agreement partners to deliver the priorities in order to improve the prospects of Lancashire. Furthermore it identifies a number of specific steps that LCC needs to take to ensure the priorities are achieved. These include ensuring that planning departments work more effectively with businesses, making sure strategic policy supports the achievement of priorities, and taking a more active role in strategic land assembly and the development of investment vehicles.

Lancashire Economic Assessment – Lancashire County Council (2011)

2.15 Although no longer a statutory document, the Local Economic Assessment remains an important document, providing an overview of Lancashire's local economy as well as playing a role in informing the development of economic strategies and interventions in order to support sustainable economic growth in Lancashire.

2.16 In terms of land, building and infrastructure, the Assessment reports that Lancashire has not benefited from the shift towards office base service sector employment, which has led to economic development and regeneration in many urban areas in the country. This has resulted in a lack of office space in the County (with the exception of Preston, Burnley, Lancaster and isolated areas of Fylde). There is therefore a need to increase the number of office developments in locations where there is demand, in order to capture a greater share of service sector employment in the future.

2.17 There remains a large amount of industrial space, some of which has become redundant due to the long term decline of manufacturing employment. There is therefore need to reutilise redundant space and provide appropriate premises to enable existing businesses to diversify and develop higher value activities, as well as to attract higher value companies to the area. Warehouse development, which has been an important contributor to employment growth in Lancashire in recent years, may provide the opportunity to support this higher value growth, particularly through links to advanced manufacturing.

2.18 The Assessment also highlights the *"lack of suitable employment sites in strategic locations which has limited economic growth and hindered inward investment*.*"* Therefore "*a development portfolio of proposed new sites is critical to Lancashire's economic future and the shift to the higher value economy*.*"* Many existing employment sites have been developed on an ad-hoc basis, rather than through strategic or economic considerations. They are consequently not sufficient for higher value uses.

2.19 A number of strategic sites are identified in the Assessment which are deemed critical to diversifying the economic base and creating more than 15,000 jobs over the next five years. The BAE Systems site at Samlesbury is the only site that is (partially) located in Ribble Valley.

An Integrated Economic Strategy for Pennine Lancashire – Pennine Lancashire Leaders and Chief Executives (2008)

2.20 The Pennine Lancashire Integrated Economic Strategy examines key economic indicators for the sub-region and other factors that influence the area's economic performance. It identifies key areas of underperformance and proposes strategic interventions to address those failings.

2.21 The Strategy makes the following points about the economy of the Pennine Lancashire Sub-Region:

- Pennine Lancashire contributes £6.1 billion to the Lancashire economy (more than any other part of the county) and employs 228,000 people
- GVA per head is only £13,000, compared to £17,200 nationally
- It has strong links with the Manchester, Leeds and Central Lancashire City Regions

- Blackburn with Darwen is the most populous district and accounts for the largest proportion of employees. However, significant employment is also located in Burnley, Hyndburn and Pendle. The distributed nature of employment in the sub-region reflects both the industrial heritage of the major towns, and a strong rural economy in the north and east of the sub-region
- Prior to the recession, employment was increasing and the number of VAT registered businesses has grown by 10 percent (to 14,000) since 1997
- Manufacturing remains an important source of employment. Although manufacturing employment has declined overall, in recent years, jobs growth has occurred in some key sub-sectors (notably furniture production, basic chemicals, and food and drink)
- Pennine Lancashire's aerospace and advanced flexible materials sectors are of national significance
- Pennine Lancashire has experienced strong business services growth in recent years, but this has been from a low employment base
- Most of Pennine Lancashire's workforce has, at least, intermediate level skills. However, graduate level skills (level 4) are under-represented
- In 2006 there were the high levels of economic inactivity in the sub-region (a quarter of the working age population was inactive compared to 21 percent nationally). 33,500 individuals were in receipt of Incapacity Benefit. Economic inactivity was spread unevenly across the area, ranging from 16 percent in the Ribble Valley to 30 percent in Hyndburn.

2.22 The Strategy's Vision for the Pennine Lancashire economy is that by 2020, the sub-region will:

- *"Have narrowed the gap in economic performance between itself, the Lancashire sub-region and the North West Region*
- *Demonstrate confidence and dynamism, mirrored in the attitudes and ambitions of the community*
- *Have high rates of new business start-ups and low business failure rates*
- *Be supported by an education and training system that reflects the economic needs of the area*
- *Be responsive to external economic pressures and new opportunities; technology and innovation will feature strongly*
- *Feature successful major projects and role models*

- *Have much lower levels of deprivation, and a much narrower gap between the more and less prosperous areas*
- *Have strong links to other neighbouring economies, with local residents readily able to access a wide range of employment opportunities*
- *Enjoy a business support infrastructure of the highest quality."*

2.23 Table 4 provides a SWOT Analysis for the Sub-Region.

Table 4 – Relevant Strengths, Weaknesses, Opportunities and Threats Facing Pennine Lancashire

Strengths	Weaknesses
• World class aerospace sector • A strong and innovative advanced manufacturing sector • Recent growth in services • Recent investment in regeneration initiatives • Strong internal connectivity • Proximity to and good communications with the Preston area	• Six small Boroughs with the lack of a single large centre • Poor commuter access by both road and rail to the key growth centres of Preston, Manchester and Leeds • Low skill levels and fewer high level skills • Low confidence and aspiration • Poor educational attainment and lack of higher level skills • Few high income households in the inner towns • Low wage rates and GVA • Below average rates of self employment and business formation • High levels of worklessness • Loss of high quality manufacturing jobs not offset by growth in services • Limited industrial structure, reliance on a number of sectors • Lack of opportunity for accredited skills training in the workplace.
Opportunities	**Threats**
• Whitebirk Strategic Employment Site and other key employment areas • Development of a BAE Aerospace Park • Proximity to Manchester, Preston and Leeds • Ready access to growth in the Preston economy • Potential new rail links to Manchester.	• Growth of the Manchester City Region and its potential domination of the region • Potential changes to the aerospace supply chain • Globalisation and potential further decline of the manufacturing sector • Competition from growth centres • Reducing public sector funding • Credit squeeze • Lack of funding for rail links.

Source: Pennine Lancashire Leaders and Chief Executives, 2008

2.24 Table 5 summarises the relevant Strategy and Strategic Interventions which have been created for to achieve this vision, along with the expected impacts.

Table 5 – An Integrated Economic Strategy for Pennine Lancashire, Relevant Policy Summary

Strategy	Strategic Intervention	Impact
Strategy 1.1 - Developing an Enterprise Culture	Change the enterprise culture of Pennine Lancashire by systematically removing barriers to enterprise and encouraging entrepreneurship at all levels and investing in entrepreneurial skills.	This will increase the rate of new business formation, reduce worklessness and raise prosperity levels.
Strategy 1.2 - Promoting Growth Sectors Growth sectors are: • Aerospace • Advanced manufacturing/ advanced flexible materials • Medical/health/fitness/ social care and well being • Creative industries • Business services • Visitor and tourism	Recognise the strategic importance of the aerospace sector to the Pennine Lancashire economy and actively promote knowledge transfer across the local economy	This will cascade the knowledge and skills embedded in the prime contractors down the supply chain, to secure real added value throughout the aerospace engineering and support sectors. It will help to make those companies more competitive and help to raise GVA.
	Promote the development of the Advanced Manufacturing sector, focusing on innovation and knowledge transfer within the economy. Support growth companies.	This will directly impact on GVA and wage levels within the local economy. It will help to encourage new investment and build on the strengths within the manufacturing sector to help secure its long term future.
	Recognise the growth potential of the medical manufacturing sector within Pennine Lancashire and dedicate appropriate resources to encourage investment and employment creation including the establishment of the Medi-Knowledge Park.	This will directly impact on job creation and investment in this high value area of the economy. It could help to establish Pennine Lancashire as an area of expertise.
	Harness the employment growth potential of the health care sector within Pennine Lancashire to narrow the skills and GVA deficit of the area.	This will directly impact on job creation, productivity and skills.
	Develop the support infrastructure for digital and media companies, building on the Creative Lancashire initiative. Identify specific opportunities for collaborative working with Media City:UK.	This would have the potential to accelerate employment creation in this national growth sector and to encourage growth in higher level skills.
	Encourage the growth of financial and business services and take steps to access the growth opportunities in adjoining City Regions	This would encourage employment growth in a high value sector within the economy and help to develop a higher skill base for Pennine Lancashire.
	Exploit the potential of the wealth of natural resources in Pennine Lancashire to promote tourism and the visitor economy.	This will help to create direct investment in visitor infrastructure, and to generate considerable employment opportunities. It will also help to change external perceptions of Pennine Lancashire and improve the area's image.
Strategy 1.3 - Encouraging Innovation	Actively seek out [including inward investment] and encourage businesses and individuals who have the potential to innovate, to create wealth and reduce the GVA deficit. Build on the Ideas North West model to help convert viable innovative projects from concept stage to reality.	This will have a direct impact on GVA within the local economy.

Strategy	Strategic Intervention	Impact
	Secure business support mechanisms to enable businesses to innovate and to bring forward new ideas and products that can be exploited to the advantage of the local economy.	
Strategy 1.4 - Growing the knowledge economy	Identify and promote the sources of higher value added activity within the economy and access routes to knowledge transfer from HE institutions. Promote these drivers.	This will have a direct impact on GVA and higher level skills within the local economy.
Strategy 2.2 - Investing in higher level skills	Promote the attainment of skills and qualifications within the workforce. Encourage employers and individuals to invest in training and personal development that will result in higher skill levels across the workforce.	This will raise skills and attainment levels across the economy and help to improve the competitiveness of the local area.
	Invest in leadership and management skills within businesses and public sector agencies.	This will equip those leading key institutions to achieve greater added value and to improve the performance and competitiveness of the organisations.
	Establish a School of Business Management within one of the HE institutions within Pennine Lancashire.	This will help to build higher level skills within businesses to equip them with the capabilities to develop and grow in a competitive environment.
Strategy 4.1 – Promoting a skilled and mobile workforce	Work with relevant stakeholders to improve the transport links within Pennine Lancashire and to adjoining City Regions, based on the need to improve the scale and quality of the labour market available to employers at the core of the conurbations.	This intervention will lead to an increase in commuting, with residents taking up additional employment opportunities in adjoining City Regions. This will help to increase the employment rate of Pennine Lancashire residents, widen the range of skills, and increase average earnings and household incomes.
Strategy 4.2 – Investing in transport infrastructure	Invest in rail infrastructure to improve the frequency and journey times from the sub region to Manchester, with a high priority for increasing the frequency of the Blackburn to Manchester leg, reinstating a direct rail link with competitive journey times between Burnley and Manchester via the Todmorden Curve, and Rossendale and Manchester.	This intervention will lead to an increase in sustainable commuting, with residents taking up employment opportunities in Greater Manchester, particularly the City of Manchester. This will help to increase the employment rate of Pennine Lancashire residents, and increase average earnings and household incomes.
	Secure the delivery of the Pennine Reach project to improve internal communications within Pennine Lancashire and to improve access to employment opportunities via public transport.	The proposed Pennine Reach project will greatly improve access for residents from deprived communities to major employment sites and town centres, and will reduce dependency on private cars.
Strategy 5.4 Securing sustainable economic growth	Embed the principles of sustainable development in the strategy and in its implementation by all partners.	The economic development of Pennine Lancashire will be to the benefit of local people and the environment. This will, over the long term, ensure that the trajectory of the key economic indicators can be changed and that the economy of Pennine Lancashire will be more robust without compromising the environmental sustainability of the area.

Strategy	Strategic Intervention	Impact
	Secure the commitment of the Pennine Lancashire partners and other stakeholders to a long term strategy of intervention that is economically and environmentally sustainable.	This will, over the long term, ensure that the trajectory of the key economic indicators can be changed and that the economy of Pennine Lancashire will be more robust, output levels will be higher and the community will be more prosperous.

Source: Pennine Lancashire Leaders and Chief Executives, 2008

Local Policy

Ribble Valley Districtwide Local Plan – Ribble Valley Borough Council (1998)

2.25 The Local Plan sets out detailed policies and specific proposals for the development and use of land in Ribble Valley. Until the Core Strategy (discussed below) and associated Development Plan Documents are adopted, the saved policies of the Districtwide Local Plan remain the primary development plan for the Borough.

2.26 The objectives of the Local Plan can be grouped under three broad aims:

- The environment
- Economic health
- Quality of life.

2.27 Relevant objectives under the 'economic health' heading include:

- *"To promote and encourage economic and productive agriculture*
- *To identify land for new industrial/employment generating operations in sites attractive to potential users*
- *To promote the diversification of farms*
- *To recreate the jobs lost at Brockhall Hospital during the 1980's/1990's on site*
- *To encourage the efficient operation, and where appropriate expansion, of existing industrial concerns*
- *To encourage a broader economic base*
- *To ensure adequate and safe transport infrastructure for industry*
- *To protect remaining and increase job opportunities in the more remote rural parts of the Borough."*

2.28 Within the defined main settlements of Ribble Valley (Clitheroe, Billington, Longridge, Whalley and Wilpshire because of its physical linkage with the Blackburn urban area) Policy G2 indicates that the the following scale of development will be approved:

- *"Wilpshire – development of sites within the settlement boundary and outside the green belt*
- *Clitheroe – consolidation and expansion of development and rounding off development. In all cases this must be on sites wholly within the settlement boundary and must be appropriate to the town's size and form*
- *Billington, Longridge and Whalley – development wholly within the built part of the settlement or the rounding-off of the built-up area."*

2.29 Within the villages of Mellor Brook, Read and Simonstone, Policy G3 indicates that planning permission will be granted for "*the development and redevelopment of land wholly within the settlement boundary, not defined as essential open space"* or *"the rehabilitation and re-use of buildings."*

2.30 Policy G4 identifies 26 further villages which could accommodate smaller scale development on allocated sites, infill sites or through the rehabilitation/re-use of rural buildings. The villages included in Policy G4 are:

- Barrow
- Bolton-by-Bowland
- Copster Green
- Chatburn
- Chipping
- Downham
- Dunsop Bridge
- Gisburn
- Grindleton
- Holden
- Hurst Green
- Langho
- Mellor
- Newton
- Osbaldeston
- Pendleton
- Ribchester
- Rimington
- Sabden
- Sawley
- Slaidburn
- Tosside
- Waddington
- West Bradford
- Wiswell
- Worston

2.31 Outside the main settlement and village boundaries, Policy G5 indicates that planning consent will only be granted for small-scale developments which are:

- *"Essential to the local economy or the social well being of the area*
- *Needed for the purposes of agriculture or forestry*
- *Sites developed for local needs housing*
- *Small scale tourism developments and small scale recreational developments appropriate to a rural area*
- *Other small-scale uses appropriate to a rural area which conform to the policies of this plan."*

2.32 Saved employment land policies allocate 7 ha of land to the north of Salthill Industrial Estate for B1 and B2 uses (Policy EMP2). The 2 ha of land adjoining Clitheroe Hospital is only suitable for B1 uses. Proposals for B8 development at Salthill must have regard to (Policy EMP3):

- *"The likely scale and nature of traffic generation*
- *The effects on the visual qualities of the area*
- *The impact of noise and fumes on neighbouring land uses."*

2.33 Policy EMP4 allocates a further 1.3 ha at Chapel Hill, Longridge for B1 uses.

2.34 Policy EMP7 indicates that "*the expansion of existing firms within the main settlement will be allowed on land within or adjacent to their existing sites, provided no significant environmental problems are caused and the extension conforms to the other policies of this plan."* Policy EMP8 adds that: *"The expansion of established firms on land outside main settlements will be allowed provided it is essential to maintain the existing source of employment and is not contrary to the other policies of this plan."*

2.35 The conversion of barns and other rural buildings for employment uses will be permitted provided (Policy EMP9):

- *"The proposed use will not cause unacceptable disturbance to neighbours in any way*
- *The building has a genuine history of use for agriculture or other rural enterprise*
- *The building is structurally sound and capable of conversion for the proposed use without the need for major alterations which would adversely affect the character of the building*
- *The impact of the proposal or additional elements likely to be required for the proper operation of the building will not harm the appearance or function of the area in which it is situated*
- *The access to the site is of a safe standard or is capable of being improved to a safe standard without harming the appearance of the area*
- *The design of the conversion should be of a high standard and be in keeping with local tradition, particularly in terms of materials, geometric form and window and door openings."*

2.36 Policy EMP11 notes that proposals to convert employment land or property, to non-employment uses, will be assessed against Local Plan Policy and:

- *"The environmental benefits to be gained by the community*
- *The potential economic and social damage caused by loss of jobs in the community*
- *Any attempts that have been made to secure an alternative employment generating use for the site."*

2.37 Policy EMP12 notes that proposals for agricultural diversifications will be approved (subject to other policies in the Local Plan) provided they are *"appropriate in both* *scale and character to the rural areas of Ribble Valley and do not compromise its natural beauty."*

2.38 Finally, the Local Plan sets out area policies for three defined locations – Primrose Lodge, Clitheroe; Brockhall Hospital, Old Langho and Calderstones Hospital, Whalley. Employment uses are considered appropriate in each area:

- Policy A1: Primrose Lodge – Development or change of use of buildings for B1 uses will be permitted in the south west of the area
- Policy A2: Brockhall Hospital – *"Employment opportunities must be created to help replace those lost as a result of the hospital closure"*
- Policy A3: Calderstones Hospital – Development proposals should provide employment opportunities which may include health, business, industrial, housing, leisure, open space and nature conservation.

Core Strategy 2008 – 2028, A Local Plan for Ribble Valley (Regulation 22 Submission Draft) – Ribble Valley Borough Council (2012)

2.39 The Ribble Valley Core Strategy forms part of the new Local Plan for the Borough. This version was formally submitted to the Secretary of State for Public Examination in October/November 2012. That Examination has now been suspended to allow the Council time to update its evidence base (which includes this refresh of the Borough's Employment Land Review).

2.40 The Core Strategy provides the overall strategy, core policies and long term vision for Ribble Valley up to 2028. The Core Strategy Vision is that:

> *"The Ribble Valley will be an area with an exceptional environment and quality of life for all, sustained by vital and vibrant market towns and villages acting as thriving service centres, meeting the needs of residents, businesses and visitors.*
>
> *We will seek to create an area with unrivalled quality of place, respecting the unique natural, social and built heritage of the area.*
>
> *New development to meet the needs of the area for growth, services and quality of life will be managed to ensure the special characteristics of the area are preserved for future generations."*

2.41 To help deliver the vision, a number of Strategic Objectives have been created. One objective is to: *"Improve the competitiveness and productivity of local businesses by safeguarding and promoting local employment opportunities."*

2.42 Key Statement DS1 provides an overarching development strategy for the Borough. It notes that strategic employment opportunities will be promoted at Barrow Enterprise Site and the Samlesbury Enterprise Zone (discussed below). In addition *"development that has recognised regeneration benefits, is for identified local needs or satisfies neighbourhood planning legislation will be considered in all the Borough's settlements, including small-scale development in the smaller settlements that are appropriate for consolidation and expansion or rounding-off of the built up area."*

2.43 Employment development will generally be directed to the main areas of population growth (Clitheroe, Longridge and Whalley) and sites linked to the A59. Strategic land releases will also be considered, particularly where these would contribute to the growth of BAE Samlesbury.

2.44 Key Statement EC1 makes the following points about business and employment development:

- A further 9 ha of employment land will be allocated over the plan period
- In identifying employment sites, priority will be given to the re-use of brownfield land
- New sites will be identified in accord with the development strategy where the health of the local and (where relevant) wider economy support such an allocation
- Opportunities to identify employment land as part of appropriate mixed-use schemes will be considered favourably
- The expansion of existing businesses will, wherever appropriate, also be considered favourably
- Developments that contribute to farm diversification, strengthen the wider rural and village economies or promote town centre vitality and viability will be supported in principle
- Proposals that result in the loss of existing employment sites, to other forms of development, will need to demonstrate that there will be no adverse impact upon the local economy.

2.45 With regards to BAE Samlesbury, Key Statement EC1 notes that this area *"should be* *regarded as a regionally significant employment site with considerable potential to accommodate a variety of advanced knowledge based industries in the future. This has been recognised by the Government's creation of an Enterprise Zone at this location. As such the site is not considered part of the Borough's general employment land supply."*

2.46 In Chapter 9, the Core Strategy states the intention to deliver a strategic site at Standen, to the south east of Clitheroe. Acceptable uses at Standen will include housing, B1 employment, community uses, local retail and service provision to serve the site, open space and recreational uses. The development will also secure improvements to the strategic highway network at the A59/Clitheroe Road/Pendle Road Junction. The precise mix of uses, developable areas, development, detailed infrastructure requirements and the need for phasing will be addressed in subsequent Development Plan and Supplementary Planning Documents.

2.47 Policy DMB1 'Supporting Business Growth and the Local Economy' makes the following points:

- *"Proposals that are intended to support business growth and the local economy will be supported in principle*
- *The expansion of existing firms within settlements will be permitted on land within or adjacent to their existing sites, provided no significant environmental problems are caused and the extension conforms to the other policies of the LDF*
- *The expansion of established firms on land outside settlements will be allowed provided it is essential to maintain the existing source of employment and can be assimilated within the local landscape. There may be occasions where due to the scale of the proposal, relocation to an alternative site is preferable*
- *Proposals for the development, redevelopment or conversion of sites with employment generating potential in the plan area for alternative uses will be assessed with regard to the following criteria:*
    - o *The provisions of Policy DMG1*
    - o *The compatibility of the proposal with other policies of the LDF*
    - o *The environmental benefits to be gained by the community*
    - o *The economic and social impact caused by loss of employment opportunities to the Borough*

- o *Any attempts that have been made to secure an alternative employment generating use for the site (must be supported by evidence (such as property agents details including periods of marketing and response) that the property/ business has been marketed for business use for a minimum period of six months or information that demonstrates to the council's satisfaction that the current use is not viable for employment purposes.).”*

2.48 Policy DMB2 ‘The Conversion of Barns and Other Rural Buildings for Employment Uses’ notes that planning permission will be granted for employment generating uses in barns and other rural buildings, provided all of the following criteria are met:

- “*The proposed use will not cause unacceptable disturbance to neighbours in any way.*
- *The building has a genuine history of use for agriculture or other rural enterprise*
- *The building is structurally sound and capable of conversion for the proposed use, without the need for major alterations which would adversely affect the character of the building*
- *The impact of the proposal or additional elements likely to be required for the proper operation of the building will not harm the appearance or function of the area in which it is situated.*
- *The access to the site is of a safe standard or is capable of being improved to a safe standard without harming the appearance of the area.*
- *The design of the conversion should be of a high standard and be in keeping with local tradition, particularly in terms of materials, geometric form and window and door openings*
- *That any existing nature conservation aspects of the existing structure are properly surveyed and where judged to be significant preserved or, if this is not possible, then many loss adequately mitigated*
- *The conversion of buildings should be of a high standard and in keeping with local tradition. The impact of the development, including the creation of servicing, storage areas and car parking facilities (or other additions) should not harm the appearance or function of the area in which it is situated*
- *Proposals for the conversion of buildings for employment purposes that include residential accommodation will be carefully assessed. The council will require the submission of a business plan in support of the proposal where*

residential accommodation is required as part of the scheme in locations where the council would otherwise restrict

- *The creation of dwellings. In all cases the proportion of living accommodation to workspace must not exceed a level of 60:40, workspace to living accommodation, and should form an integral part of the layout and design of the conversion*
- *Proposals will be assessed in accordance with national planning guidance."*

Ribble Valley: An Economic Strategy 2009-2014 – Ribble Valley Borough Council (2009)

2.49 This document sets out aims and objectives for achieving a successful and sustainable economic environment in the Borough. The vision for the Economic Strategy is that: *"a competitive and sustainable economy will be created for the Borough of Ribble Valley, providing opportunities for employment and continuous business development. By encouraging sustainable practices, we will seek to enhance and maintain vibrant local communities whilst promoting the protection of the environment for future generations."* The strategy sets out five thematic areas of activity:

- *"Regeneration and Economic Development - maximising the areas potential to generate initiatives, projects and attract resources in line with community needs. Encourage and engage both people and businesses for collective community action*
- *Business Support and Development – addressing issues that facilitate healthy business performance, encouraging business start-ups, business growth and inward investment*
- *Infrastructure and Communications - providing the necessary 'physical environment' in areas such as transport, affordable housing, ICT and 'broadband' access, appropriate business sites and premises*
- *Image, Marketing and Promotion – maintaining and enhancing the perception and image of the area; inspiring and encouraging people to invest in and visit Ribble Valley whether for business or pleasure*
- *Employment and Skills - ensuring with partners in the public and private sectors that a diversity of training and educational opportunities are available to people and businesses to ensure a healthy labour market.*

2.50 A SWOT analysis identifies a number of strengths, weaknesses, opportunities and threats facing the economic development of the Borough. Those of relevance to this study are outlined in Table 6.

Table 6 – Strengths, Weaknesses, Opportunities and Threats Facing Future Economic Development

Strengths	Weaknesses
• Low Unemployment • Culture of Enterprise and Entrepreneurship • Location advantages and external transport links road (M6, M65 and A59) and rail • Low levels of unemployment and deprivation • Strong agricultural sector and resilient manufacturing and retail sector • High educational attainment and skill levels within resident population • Good business formation and self employment rates and high levels of entrepreneurship • Market towns and rural centres established in their roles • Dedicated town partnerships and Chambers of Trade • Strong employment growth and business formation in recent years	• Limited amount of employment land • Hidden low wage economy in certain sectors • Poor rural transport and utilities infrastructure in some areas • Over representation in declining economic sectors • High and increasing levels of in and out commuting (net out commuter) and worsening self-containment rate • Shallow knowledge economy and low representation of growth sectors • Low inward investment profile and limited recent success • Areas of rural disadvantage, service loss and isolation • Poor public transport provision and reliance on private transport to access employment/ training • Some key sectors seen as low skill/low wage employers • Transport / Traffic constraints affecting viability of economic centres
Opportunities	**Threats**
• Location and accessibility to M6, M65 and A59 affording good east/west and north/south connectivity • Access to ICT Broadband Infrastructure • Vocational training opportunities (Aspire Project) • Retain commuters and stem worsening self containment rate • Increase Borough's share of regional inward investment success • Potential of A59 corridor for employment development • Growth potential of existing businesses and their loyalty to area • Corporate track record in e-government and potential lead on ICT infrastructure/e- business • Opportunity to harness skills, knowledge and entrepreneurial potential of resident population	• Perception of an affluent area • Lack of Government and European funding streams • Insufficient employment land to meet future potential needs • Tight labour supply and perceived skills shortages / gaps (particularly lower level occupations) • Potential loss of existing firms seeking expansion • Perceived/actual mismatch of labour supply and demand • Continuing cost and competitive pressures facing traditional sectors (agriculture / manufacturing.) • Continuing loss of employment land to alternate uses • Low commercial vacancy rates and comparative high costs of commercial development • Economic growth potentially constrained by planning policies • Exodus of talented young people

Source: Ribble Valley Borough Council, 2009

2.51 Table 7 summarises the Strategic Objectives which have been created for each theme, the main local issues identified for each thematic area and the Priority Aims and Objectives, (relevant for this study) set for each theme.

Table 7 – Ribble Valley Economic Strategy, Policy Summary

Theme	Strategic Objective	Main Issues Identified	Priority Aims and Objectives
Regeneration and Economic Development	To identify and develop initiatives that will encourage the long term physical and social regeneration of Ribble Valley, maximising on and seeking appropriate funding from national, regional and sub regional sources wherever possible	• The need to establish geographical and thematic priorities for action • The need to link all aspects of Ribble Valley's regeneration needs to regional and sub-regional priorities • The need to retain and enhance local services to local people and businesses • Benefits of Partnership working locally, sub-regionally and regionally • Identify, constantly monitor and pursue funding opportunities in line with Ribble Valley's economic needs • Maximising opportunities for further development appropriate to needs.	• Establish priorities for in the major service centres of Clitheroe, Longridge and Whalley through the development of individual Action Plans, working in partnership with Parish and Town Councils and local business groups • Support regeneration activities in smaller settlements through the Community and Parish Planning process • Strengthen and develop communication mechanisms for sharing regeneration information between Ribble Valley partners • Ensure, through effective representation, that sub-regional, regional, national and European policy makers are aware of the issues facing Ribble Valley • Ensure that the 'rural' case for funding assistance from national, regional, sub-regional and European sources has a high profile • Maximise funding opportunities as appropriate to the needs of the area • Engage with Ribble Valley Local Strategic Partnership steering group to take forward the Ribble Valley Community Strategy • Work towards developing a higher wage economy.
Business Support and Development	To work in partnership at local, sub-regional and regional level to provide the best possible support for existing and new businesses in the Ribble Valley	• A confusing network of agencies supporting businesses • Lack of awareness of the activities of some agencies • Inward Investment competition in other areas. • High growth potential around A59 corridor • Opportunity to develop social and community enterprise • Opportunity for expansion in key growth sectors such as tourism, food and drink, creative and	• Enhance co-ordination of business advice and support services in Ribble Valley • Promote a sustainable approach to business development in Ribble Valley • Increase the profile of business support and advice services through improved promotion throughout the area using appropriate media • Monitor incentives and schemes of support and assistance (including financial support) to businesses in Ribble Valley • Seek measures towards accommodating appropriate and potential inward investment to the area.

Theme	Strategic Objective	Main Issues Identified	Priority Aims and Objectives
		cultural industries, digital industries, financial and professional services, sport and textiles.	
Infrastructure and Communications	To strive for a high quality, modern and integrated infrastructure, maintaining and improving the public realm, appropriate and affordable housing, transport infrastructure and technology for the benefit of Ribble Valley business, residents and visitors without compromising the quality of the existing natural and built environment	• Poor internal transport systems in some areas • Good external transport networks within half hour-hour drive • ICT offers opportunity to attract quality businesses • ICT communications and broadband access needs addressing • Inadequate supply of appropriate business accommodation • Certain growth can be constrained by the planning regime • Lack of availability of employment land for new and future investment.	• Promote external transport networks e.g. regional, national links and encourage potential enhancement schemes to support this • Encourage the improvement of local transport provision • Seek improvements to ICT and broadband access across the whole community • Identify demand for business accommodation and sites across Ribble Valley • Develop and redevelop, through appropriate programmes, key employment sites and premises in major service centres, including the stimulation and investment in tourism projects.
Image, Marketing and Promotion	To constantly and consistently raise the profile and perceptions of Ribble Valley, strengthening awareness of the benefits of the area in terms of quality of life as a place to live, visit, work and do business	• Need to raise the profile of Ribble Valley, sub-regionally, regionally and nationally • Low awareness of economic development and business support services	• Raise awareness of the importance of economic development and tourism to the local economy • Continue to strengthen our work with tourism and economic development partners to raise the profile of Ribble Valley
Employment and Skills	Encourage and develop educational attainment and a skilled labour market in Ribble Valley for the benefit of	• Lack of data to clearly identify training and development issues facing Ribble Valley employers • The need to undertake research into skills gaps and skills needs	• Identify employer and employee skills needs • Supporting partnership working to provide solutions to skills issues identified • Ensure that learning opportunities are addressing the needs of Ribble Valley businesses

Theme	Strategic Objective	Main Issues Identified	Priority Aims and Objectives
	existing and new employers	into skills gaps and skills needs • Lack of skills identified in growth sectors such as culture and creative industries, leisure and sport • Lack of career development opportunities • Lack of training opportunities in outlying areas of Ribble Valley • Decline in workforce development by employers	of Ribble Valley businesses • To provide learning opportunities as locally as possible • To encourage the development of a comprehensive vocational learning centre in Ribble Valley • Promote and develop learning activities that support lifelong learning • Seek measures to encourage the knowledge economy in Ribble Valley

Source: Ribble Valley Borough Council, 2009

Employment Land Position Statement – Ribble Valley Borough Council (2011)

2.52 This document provides an update on the 2008 Employment Land and Retail Study. It sets out and analysis of future employment land requirements, to 2020, based on past land take-up rates.

2.53 The period 2008-2010 saw completions on 1.776 ha of employment land (excluding development in BAE Samlesbury) or 0.88 ha per year (rounded to 0.9 ha per year). Extending that figure over 10 years (to 9 ha), then adding a 5-year buffer, as applied in the 2008 Employment Land and Retail Study, gives a ten year land need of 13.5 ha.

2.54 2008 Employment Land and Retail Study identified that Ribble Valley had a readily available employment land supply of 12.52 ha. Between 2008 and 2010, completions have taken place on three sites:

- New Close Properties, Barrow Brook (housing) – 2.74 ha
- Salesbury Hall Farm (employment) – 0.13 ha
- Total Foods, Barrow Brook (employment) – 0.86 ha

2.55 Removing these completions (which total 3.73 ha) gives an updated supply of 8.79 ha. Including outstanding planning permissions (which total 1.74 ha) gives a total land supply of 10.54 ha. As Table 8 shows, subtracting that supply from the projected need (13.50 ha) indicates that there is a land supply shortfall of 2.96 ha.

Table 8 – Employment Land Supply 2010 – 2020

Supply Calculation 2010	Area (ha)
Overall Need (at 0.9 ha/yr plus 5 year buffer)	13.50
Remaining Supply	8.80
Existing Permissions (for employment uses)	1.74
Sub total (13.5 – 10.54 (8.8 + 1.74.))	***2.96***
Losses to be made good (2008 – 2010)	2.60
Total Additional Requirement	**5.56 (6 rounded)**

Source: Ribble Valley Borough Council, 2011

2.56 However, the period 2008-2010 also saw 2.60 ha of employment land lost to non-employment uses. Thus the total additional requirement (as shown in Table 8) is 5.56 ha (rounded to 6 ha).

2.57 This additional land need will be met in, and around, the Borough's existing major employment locations (notably Barrow Brook). There are few opportunities to deliver additional large employment allocations in Ribble Valley.

2.58 Local property agents, consulted for this research, made several points about the local property market and how they saw it developing over the next two to three years:

Office Market

- The local office market is severely limited by the current oversupply of premises in the M65 corridor and the relatively small local demand
- The on-going caution over bank lending is constraining freehold demand
- The prime location in the Ribble Valley is the A59 corridor, including the area around Samlesbury, which benefits from nearby access to Preston and the M6
- There is limited demand in the wider rural area. Occasional high quality development, such as at Salesbury, could work but that particular development has probably soaked up all current demand for that type of development in more rural locations
- There maybe a market for small offices in the local towns, notably for businesses making the transition from homeworking. However, some agents felt that the market for 'over the shop' offices was not healthy.

Industrial Market

- There is demand for accessible, (ideally) freehold, light industrial units of less than 3,000 sqm
- Units at Salthill, brought up to a modern specification, would fit this market
- An extension to Salthill/Link 59, with premises to modern specifications, would also meet needs, as would the development of light industrial uses at Barrow Brook.

Ribble Valley Sustainable Community Strategy 2007-2013 – Ribble Valley Strategic Partnership (2008)

2.59 The purpose of the Sustainable Community Strategy is to:

- *"Support our Communities in articulating their hopes, needs and priorities*
- *Co-ordinate the actions of all public, private, voluntary, community (including the faith sector) organisations operating locally*
- *Focus and shape existing and future activity of those organisations to meet community needs and aspirations*

- *Contribute to local and wider sustainable development*
- *Give clear prioritised targets for Ribble Valley Strategic Partnership members to achieve*
- *Create a working document directing service and budget planning of partner organisations*
- *Help the local authorities prepare their land-use plans*
- *Emphasise those priorities and actions that rely on efficient partnership working for their achievement."*

2.60 The vision of the Community Strategy is to create, in Ribble Valley: *"An area with an exceptional environment and quality of life for all, sustained by vital and vibrant market towns and villages acting as thriving service centres, meeting the needs of residents, businesses and visitors".*

2.61 The actions of the Strategy are listed under three headings – People, Places and Prosperity. Under the 'Prosperity' heading, Key Priorities include the need to: *"ensure that there are opportunities for businesses to survive and flourish."* Relevant Strategic Objectives and Key Actions under the Prosperity heading are shown in Table 9.

Table 9 – Ribble Valley Sustainable Community Strategy – 'Prosperity' Theme Policy Summary

Strategic Objective	Action(s)
Diversify the economy by encouraging and supporting a broader range of business sectors and support existing businesses to provide a basis for diversification	Increase number of new high growth business starts and the survival rates of new and existing businesses through the provision of appropriate business advice and support in Ribble Valley linked to the BSSP agenda Take all appropriate steps to ensure the availability of a locally accessible business support service for rural enterprises
Encourage young people to be more enterprising and develop business opportunities	Undertake research into youth enterprise initiatives specifically looking at the 14-30 age and improve career opportunities and the take up of those opportunities
Ensure that there is a supply of suitable employment sites	Identify suitable business workspace and employment sites through the production of the Local Development Framework and consider all methods by which designated employment land can be implemented
Improve the competitiveness and productivity of local businesses by promoting local produce and local	Launch a campaign to 'think and act Ribble Valley'

Strategic Objective	Action(s)
promoting local produce and local employment opportunities	
Explore opportunities to further develop Ribble Valley's Business base	Undertake a strategic review of the economic development potential based on the A59 corridor

Source: Ribble Valley Strategic Partnership, 2008

Clitheroe Town Centre Masterplan – Ribble Valley Borough Council/Lancashire County Council/Ribble Valley Strategic Partnership (2010)

2.62 This masterplan aims to set out a strategy for the future of Clitheroe Town Centre, together with development principles for the Market Square area. The masterplan vision is to make Clitheroe *"a place of many places"* and to achieve this, a number of goals are set, namely to make the town:

- *"Recognised as one of the most diverse places in the Ribble Valley*
- *Distinct, independent, refined and well known for food, shopping and events vibrant, offering a choice of places to shop, visit, stay, live and work*
- *Alive with culture and heritage*
- *For all seasons with events, festivals and celebrations throughout the year*
- *Connected to and provides for its community*
- *Connected by streets and squares that are easily understood and explored*
- *Connected to its region and landscape*
- *Confident, a place to invest with a clear delivery strategy*
- *Well managed by its civic, business and residential communities."*

2.63 The masterplan identifies four 'catalyst projects' for change in the town:

- Town Team
- Castle Street and Clitheroe Market
- Moor Lane and Lowergate
- Market Place and Wellgate.

2.64 In the Market Place and Wellgate, the masterplan proposes the reuse and conversion of vacant/derelict buildings and the development of vacant sites. New business, leisure and residential uses will be promoted through the conversion of existing uses and on infill sites.

The Lancashire Advanced Engineering and Manufacturing Enterprise Zone (Samlesbury) Local Development Order No.1 – Lancashire County Council (2012)

2.65 In the 2011 Budget Government announced that it would establish 21 new Enterprise Zones (EZ) in Local Enterprise Partnership (LEP) areas in order to improve local economies and increase contribution to national growth. The first 11 LEPs to benefit from the EZs were named in the Budget. For the second wave, LEPs were asked to submit bids.

2.66 Lancashire Enterprise Partnership Ltd submitted a bid to develop the Lancashire Advanced Engineering and Manufacturing (AEM) Enterprise Zone, with BAE Systems as the lead private sector partner. In the Government's Autumn 2011 Financial Statement the Chancellor of the Exchequer granted Enterprise Zone status to the BAE Systems Samlesbury and Warton sites.

2.67 The Enterprise Zone will create 1,200 jobs in the short/medium term and 4,000 to 6,000 jobs in the long term (across both the Samlesbury and Warton sites). It aims to attract inward investment opportunities, into Lancashire, in the advanced engineering and manufacturing sector. It will not displace existing companies that are already located in Lancashire.

2.68 The Lancashire Enterprise Partnership (LEP) will manage and co-ordinate activities in the Enterprise Zone through an Enterprise Zone Governing Body. In association with BAE Systems as the landowner, it will assess each proposed development to ensure that the displacement of existing Lancashire companies does not occur and that any development is genuine growth. Activity will focus on international inward investment.

2.69 The Lancashire Advanced Engineering and Manufacturing Enterprise Zone (Samlesbury) Local Development Order (LDO) is part of a phased approach to the development of the Samlesbury element of the Enterprise Zone. The LDO covers 16 ha of land, most of which is within Ribble Valley portion of the Samlesbury facility, that will be the focus for new development associated with the Enterprise Zone.

2.70 The purpose of the LDO is to authorise the development of Class B uses in the

Enterprise Zone, where that development will provide accommodation to advanced engineering and manufacturing businesses in the following sectors:.

- Advanced flexible materials
- Aerospace
- Computing, systems engineering and autonomous systems
- General Aviation Services
- High-end automotive including motorsport, electric/alternative energy vehicles,
- Nuclear
- Renewable Energy.

2.71 Delivery of a (D1 use class) Regional Skills Academy at Samlesbury is also authorised by the LDO.

2.72 Development for occupiers falling within the above industry sectors is automatically within the scope of the LDO and will not require full planning permission to bring forward (although other statutory requirements, including assessments of highways and ecological impacts will still be needed). Development outside the scope of the LDO will require the submission of a standard planning application. However, proposals to provide space for advanced engineering or manufacturing businesses which fall outside of the above sectors, or for complementary uses, would (subject to the approval of the Local Planning Authority and LEP) potentially also be acceptable.

2.73 The LDO will be active for three years (with options to renew after that time) and will be augmented by a masterplan (currently under preparation) that will place this LDO within a strategic context and establish long-term strategic objectives.

Parish Plans and Town Action Plans

2.74 Only two local parish councils have produced full parish plans (Read and Grindleton) while the Longridge Partnership and Whalley Parish Council/Whalley Chamber of Trade have (with the assistance of the Borough Council) produced Action Plans for those towns. At the time of writing, Simonstone is also in the process of producing a parish plan.

2.75 As Table 10 shows, these studies make little reference to supply or demand for

B1/B2/B8 uses. However, the Longridge Action Plan suggests support for additional employment premises, specifically an extension to Shay Lane Industrial Estate. Within that town, the Longridge Business Group is working to promote and represent local businesses through a variety of methods.

Table 10 – Parish/Town Plan Employment Issues

Parish Plan	Employment Comment - Yes / No	Comment
Grindleton (2008)	Y	In a survey of 180 households, some demand for business start-up advice was noted. The Parish Action Plan (2008) sought to help young people who seek paid work like baby sitting, dog walking, etc. The aspirations of such individuals are to be promoted through use of the Parish website and magazine.
Read (2012)	N	-
Longridge Action Plan (2010)	Y	Action 2: Support Extension of Shay Lane Industrial Estate Action 18: To continue to promote Longridge as a centre to do business Action 26: Support the development of the Civic Hall Site. Within the town, the Longridge Business Group has 52 local members. Its stated goals are to: • Promote Longridge as a retail, business and leisure destination to consumers and other businesses in the North West • Ensure the trading environment in the town is conducive to the success of businesses and encourage the establishment of other businesses in the town • Act as the interface between Longridge businesses and other stakeholders in the town • Influence statutory bodies to the extent that Longridge businesses will be represented at the appropriate level and aid in developing the potential of Longridge environmentally, socially and economically • Communicate with all businesses in the town on matters of relevance, quickly and effectively. The Business Group has assisted around 20 businesses to advertise themselves in the trade magazine Home Handbook, which is distributed to 6,000 homes around the area. Businesses, vacancies and available commercial premises are also advertised on the Business Group website. The Group also helps to organise and publicise events which attract visitors to the town (such as the new Winter Festival) and represents local businesses in engaging with organisations such as

Parish Plan	Employment Comment - Yes / No	Comment
		the Borough Council.
Economic Action Plan for Whalley (2010)	Y	Theme 3 of the Plan (Business Support, Development & Investment) has the following Actions/Activities: • Significantly improve Broadband to Businesses • Provide a business support information point at Whalley Library and provide a direct Business Link website linkage to the Chamber of Trade Website

Source: BE Group 2013

Summary

2.76 It is a responsibility of local government to support and encourage economic growth. This includes the provision, initially through planning policy, of sufficient employment land and premises. This must be of the right scale, type and location, be readily available for development and be well related to the strategic or local highway network according to the nature of the site and the function of the settlement. One of the most important issues to consider is that the land must be allocated in sustainable locations and be readily capable of development. The employment land portfolio needs to be balanced and to adequately cater to all sectors of the economy, i.e. small and large businesses, offices and industrial, high and low quality operations.

2.77 Strategies prioritise development into the main settlements of Clitheroe, Longridge and Whalley. Encouraging sustainable communities is supported, particularly in a range of rural centres such as Dunsop Bridge and Ribchester.

2.78 The emerging Core Strategy seeks to promote strategic employment opportunities at the Barrow Enterprise Site and Samlesbury Enterprise Zone. A further strategic development site is also proposed at Standen, to the south east of Clitheroe. Acceptable uses at Standen could include B1 employment. Overall, a further 9 ha of employment land will be allocated over the plan period (to 2028).

2.79 The Council's 2011 Employment Land Position Statement, which updates the 2008 Employment Land and Retail Study, suggests that, a further 5.56 ha of employment will be required over the 2010-2020 period. This additional land need will be met in, and around, the Borough's major employment locations (notably Barrow Brook). There are few opportunities to deliver additional large employment allocations in Ribble Valley.

2.80 Around 16 ha of the BAE Systems site at Samlesbury is now an Enterprise Zone; along with land at its sister facility in Warton. The Enterprise Zone could create 6,000 new jobs in the long term. A Local Development Order is now in place which authorises development that will provide accommodation to advanced engineering and manufacturing businesses in eight key sectors. An education and skills facility (Regional Skills Academy) is also allowed.

2.81 There is little focus on B1/B2/B8 uses in the parish plans or town action plans. Instead the focus is on promoting existing companies. Only the Longridge Action Plan suggests support for additional employment premises, specifically an extension to Shay Lane Industrial Estate.

3.0 SOCIO-ECONOMIC PROFILE

Introduction

3.1 It is important to understand the nature of the economy in Ribble Valley in order to provide suitable employment opportunities to facilitate sustainable growth. For example there is a need to try and provide employment land close to existing concentrations of businesses, in regeneration areas or in areas where companies want to locate.

3.2 This section, therefore, considers the size of the economy, where the businesses are, and what type of businesses they are. By appreciating these aspects it is easier to facilitate economic development by allocating land and premises in the correct locations and of the right type. The profile is a result of secondary research, drawing together a number of existing data sources. It also uses demographic data to build the picture, given that there are no readily available answers to some of the key questions included within this section.

Demographic Assessment

3.3 The population of the Ribble Valley, as of the 2011 Census, was 57,132 residents, which was 3.9 percent of the Lancashire total (1,460,893). Comparison with the 2001 Census indicates that the Borough's population increased by 5.6 percent (from 53,960) over that 10 year period. This is above the county (3.3 percent) and regional (4.8 percent) growth rates, over the same period, but well below the national growth rate (7.8 percent).

3.4 The Census also showed that, as of March 2011, 66.9 percent of Ribble Valley's economically active population was in employment. This was higher than the North West (59.6 percent) and national (62.1 percent) averages. At 2.1 percent, local unemployment was less than half the regional (4.7 percent) and national (4.4 percent) averages. A county wide unemployment figure is not available from the 2011 Census.

3.5 Deprivation is not a significant issue in Ribble Valley. The Lancashire County Economic Assessment (2011) indicates that the Lower Super Output Areas (LSOAs) of Ribble Valley Borough had an average rank of 285 in 2010. This places Ribble Valley in the top 20 percent least deprived local authority areas in England and makes the Borough the least deprived in Lancashire. In comparison, neighbouring Burnley is the 21st most deprived local authority area in England.

3.6 Deprivation in Ribble Valley has grown slightly worse since 2007, when the Borough was ranked 296th in England (a drop of 11 places). This reflects similar decreases in most other Lancashire local authorities, during the recession. Across the county the changes range from a drop of three places in West Lancashire to a drop of 35 places in Chorley. Only three local authorities (Blackburn with Darwen, Rossendale and Wyre) improved their ranking between 2007 and 2010, and only by one to five places.

3.7 Table 11 shows that the working age population of Ribble Valley is highly qualified. The proportion of working age residents qualified to NVQ Level 4 and above (equivalent to degree level), is well above county, regional and national levels. Conversely, the proportion of residents with no qualifications (18.3 percent) is low when compared that of Lancashire, the North West and England.

Table 11 – Qualifications (2011), Percent

Level	NVQ4 and above	NVQ3 and above	NVQ2 and above	NVQ1 and above	Other qualifications	No qualifications
Ribble Valley	34.0	46.5	66.8	77.9	3.7	18.3
Lancashire	23.6	36.8	57.1	70.7	4.7	24.8
North West	24.4	37.3	57.0	70.6	4.5	24.8
England	27.4	39.4	58.6	71.9	5.7	22.5

Source: 2011 Census

Employment by Occupation

3.8 Table 12 illustrates the breakdown of employment by main occupation group. Ribble Valley has a significantly higher proportion of people employed as managers, directors and senior officials and in professional occupations than is the case elsewhere. The proportion employed in skilled trade occupations is also above wider averages.

Table 12 – Employment by Main Occupation Group, Percent

Socio-Economic Class	Ribble Valley	Lancashire	North West	England
Managers, Directors and Senior Officials	13.8	9.9	9.9	10.9
Professional Occupations	20.2	17.2	16.3	17.5
Associate Professional and Technical Occupations	11.3	12.3	11.5	12.8
Administrative and Secretarial Occupations	10.3	12.5	11.8	11.5
Skilled Trades Occupations	14.0	11.2	11.3	11.4
Caring, Leisure and Other Service Occupations	9.6	10.2	10.1	9.3
Sales and Customer Service Occupations	5.4	7.7	9.4	8.4
Process, Plant and Machine Operatives	6.3	6.5	8.1	7.2
Elementary Occupations	9.1	11.6	11.6	11.1

Source: 2011 Census, ONS Annual Population Survey 2011

3.9 Conversely, Ribble Valley has a smaller proportion of people employed in low level roles such as sales and customer service or elementary occupations. Differences in how this Census data is collected mean that the proportions shown in Table 13 cannot be compared with the 2006-2007 employment data (derived from the 2007 Annual Population Survey) included in the 2008 Employment Land and Retail Study.

3.10 The 2011 Census also provides details of the number of jobs within differing industry sectors within a local authority area. In the 2008 study, economic activity was measured using Annual Business Inquiry (ABI) data. As data for ABI and the Census is collected using different survey methods, again it is not possible to compare the present breakdown of economic activity with the position in the 2008 Employment Land and Retail Study.

3.11 Table 13 shows that the largest employment sector in Ribble Valley is wholesale and retail trade (and repair of motor vehicles), which accounts for 15.1 percent of jobs. The public sector, notably education, human health and social work activities, is also a large employer in the Borough. Almost a third of all jobs are in sectors which will be dominated by public organisations. However, this is in line with Lancashire and North West averages.

Table 13 – Economic Activity

	Employment Structure, proportion of jobs, percent			
	Ribble Valley	Lancashire	North West	England
Agriculture, Forestry and Fishing	2.9	1.0	0.7	0.8
Mining and Quarrying	0.1	0.1	0.1	0.2
Manufacturing	13.1	12.2	10.3	8.8
Electricity, Gas, Steam and Air Conditioning Supply	0.3	0.6	0.6	0.6
Water Supply, Sewerage, Waste Management and Remediation Activities	0.7	0.7	0.8	0.7
Construction	7.9	7.5	7.4	7.7
Wholesale and Retail Trade, Repair of Motor Vehicles	15.1	16.6	16.7	15.9
Transport and Storage	2.6	4.3	5.0	5.0
Accommodation and Food Service Activities	6.2	6.0	5.9	5.6
Information and Communication	2.2	2.5	2.9	4.1
Finance and Insurance Activities	2.4	2.6	3.5	4.4
Real Estate Activities	1.4	1.2	1.4	1.5
Professional, Scientific and Technical Activities	6.1	4.5	5.6	6.7
Administrative and Support Service Activities	3.1	4.3	4.9	4.9
Public Administration, Defence and Social Security	5.5	7.2	6.0	5.9
Education	12.4	10.2	9.7	9.9
Human Health and Social Work Activities	13.6	14.2	13.9	12.4
Other	4.5	4.4	4.6	5.0

Source: 2011 Census

3.12 The manufacturing sector also employs a high proportion of local people in Ribble Valley. It accounts for 13.1 percent of jobs, above county, regional and national averages. Manufacturing employment in Ribble Valley is boosted by the presence of several large employers, notably BAE Systems, Samlesbury (although the bulk of that facility is in neighbouring South Ribble Borough).

3.13 Transport and storage has only a modest role in Ribble Valley. Only 2.6 percent of the Borough's workforce is employed in this sector, compared to county, regional and national averages of 4.3-5.0 percent. Administrative and support service activities also have a limited presence in Ribble Valley when compared to wider averages.

3.14 Unsurprisingly, given Ribble Valley's rural character, the Borough supports a strong agricultural sector. Agriculture, forestry and fishing employ 2.9 percent of the Borough's population, compared to only 0.7 across the North West and 0.8 percent nationally. The Department of Environment, Food and Rural Affairs June 2010 Survey of Agriculture and Horticulture (latest available data at the local authority level) indicates that in that year there were 626 agricultural holdings in Ribble Valley, farming 47,853 ha of land (82 percent of the total land of the Borough). Almost all of that land (97 percent) was used as grassland to support livestock. Together these farms employed 1,408 people, including 1,079 full and part-time farmers, 233 full and part-time workers, 17 salaried managers and 79 casual workers.

Numbers and Sizes of Businesses

3.15 ONS data identifies that there were 3,260 VAT registered businesses operating in the Borough (see Table 14) in 2011. This compares to 2,720 in 2007, the figure used in the 2008 Employment Land and Retail Study. Thus some 540 businesses were either created in Ribble Valley, or relocated into the Borough, over that four year period.

3.16 83 percent of businesses in England employ less than ten people (micro businesses), and overall 96.6 percent of all businesses are classified as small (up to 49 employees). The proportion of small and micro businesses in Ribble Valley is slightly above regional and national averages (but follows the Lancashire average). As Table 14 shows, 97.9 percent of businesses in the Borough employ less than 50 employees, while the proportion employing less than ten is 88.8 percent.

Table 14 – Business Sizes, Percent

Area	Number of Employees						
	1-4	5-9	10-19	20-49	50-99	100-249	250+
Ribble Valley	75.8	13.0	5.7	3.4	1.4	0.5	0.3
Lancashire	74.5	13.7	6.3	3.4	1.1	0.6	0.4
North West	65.8	15.5	8.7	6.2	2.2	1.1	0.5
England	68.5	14.5	8.1	5.5	2.0	1.0	0.5

Source: ONS 2011

3.17 The total number of VAT registered businesses can be broken down further by industry sector. Table 15 again emphasises the strength of agriculture in Ribble Valley. 16.1 percent of the Borough's active businesses are in the agriculture, forestry and fishing sector, more than double county and regional averages and more than triple the national average.

Table 15 – VAT Registered Businesses by Sector, Percent

Sector	Ribble Valley	Lancashire	North West	England
Agriculture, Forestry and Fishing	16.1	7.8	5.4	4.4
Production	6.1	7.8	7.1	5.8
Construction	10.4	12.7	12.1	10.7
Motor Trades	3.4	4.3	3.6	3.0
Wholesale	4.6	5.4	5.5	5.0
Retail	10.6	10.8	10.3	11.0
Transport and Storage	3.2	3.8	3.5	3.2
Accommodation and Food Services	6.7	6.2	6.5	6.2
Information and Communication	2.9	4.3	5.3	6.6
Finance and Insurance	1.8	2.0	2.5	2.7
Property	3.4	3.5	3.7	3.6
Professional, Scientific and Technical	12.3	12.2	15.0	14.3
Business Administration and Support Services	6.0	6.6	6.7	7.2
Public Administration, Defence, Education and Health	6.9	6.0	6.1	9.2
Arts, Entertainment, Recreation and Other Services	5.5	6.6	6.7	7.1

Source: ONS 2011

3.18 The second largest business sector is professional, scientific and technical, which accounts for 12.3 percent of VAT registered businesses (equal to the Lancashire average of 12.2 percent, but below regional and national averages of 14-15 percent). The construction, retail and public administration, defence, education and health sectors are also strong, although the proportions of these in Ribble Valley are below (most) wider averages.

3.19 In comparison, the proportions of motor trade; finance; arts, entertainment, recreation and other services and, most notably, insurance information and communication businesses in the Borough are generally lower than elsewhere.

Geographic Location

3.20 Table 16 shows the distribution of office and industrial premises (hereditaments identified by the Valuation Office for the purposes of business rates collection). The spatial distribution can be analysed by Middle Super Output Areas (MSOAs). Ribble Valley comprises eight such MSOAs. The most recent Valuation Office data available at the MSOA level is only for 2008 (only one year later than the data used in the 2008 Employment Land and Retail Study), which pre-dates the recession.

3.21 Table 16 shows that the number of industrial units in Ribble Valley is more than double the number of offices. The bulk of the business space is located in the south of the Borough, near to the boundary with Burnley and Hyndburn local authorities (including Time Technology Park, Simonstone), and in North and East Clitheroe (Link 59, Primrose Industrial Estate and Salthill Industrial Estate).

3.22 There are far fewer properties in the western part of the Borough. Only 9.7 percent of the units and 4.9 percent of the floorspace are here. The north east part of the Borough is also poorly represented with just 11.1 percent of the units and 4.2 percent of the floorspace.

Table 16 – Valuation Office Hereditaments

Area	**Number of Units (Floorspace, sqm)**		**Number of People Homeworking, 2011**
	Factories/ Warehouses	**Office**	
North Eastern			
SOA 001 (Slaidburn, Bolton by Bowland, Gisburn, Waddington, Newton, Bashall Eaves, Hurst Green)	61 (15,000)	29 (2,000)	613
Central			
SOA 002 (North and East Clitheroe)	156 (182,000)	69 (11,000)	177
SOA 003 (South and West Clitheroe)	47 (38,000)	39 (4,000)	140
Sub-Total	*203 (220,000)*	*108 (15,000)*	*317*

Area	Number of Units (Floorspace, sqm)		Number of People Homeworking, 2011
	Factories/ Warehouses	Office	
Western SOA 004 (Dunsop Bridge, Chipping, Hesketh, Knowle Green, Ribchester)	50 (19,000)	19 (1,000)	278
Southern SOA 005 (Chatburn, Downham, Sabden, Simonstone, Barrow, Wisewell, Worston)	89 (46,000)	-	276
SOA 006 (Longridge)	86 (52,000)	33 (3,000)	128
SOA 007 (Billington, Whalley, Grant Mitton)	58 (19,000)	39 (4,000)	303
SOA 008 (Balderstone, Samlesbury, Mellor)	33 (9,000)	-	367
Sub-Total	*266* *(126,000)*	*72* *(7,000)*	*1,074*
Total	**580** **(380,000)**	**228** **(25,000)**	**2,282**

Source: ONS Commercial and Industrial Floorspace 2008

Census 2011

Homeworking

3.23 In Ribble Valley, homeworking accounted for 14.6 percent of the working age population in employment in 2011 (increased from 12.7 percent in 2001). This is above the average homeworking levels for Lancashire (10.2 percent), the North West (9.4 percent) and England (10.6 percent). High proportions of people work from home in the rural north east of the Borough.

Commuting Patterns

3.24 Details on contemporary commuting patterns, obtained through the 2011 Census have yet to be published. Until they are, the most up to date commuting data is available from the 2001 Census. Table 17 analyses 2001 Census data on commuting.

Table 17 – Travel to Work Flows – Ribble Valley, 2001

Destination/Origin	Ribble Valley Inflow	Ribble Valley Outflow	Net Inflow/(Outflow)
Blackburn	1,810	3,385	(1,575)
Blackpool	183	174	9
Burnley	1,011	1,066	(55)
Chorley	466	201	265
Fylde	272	325	(53)
Hyndburn	1,588	1,629	(41)
Lancaster	195	168	27
Pendle	783	516	267
Preston	1,630	2,271	(641)
Ribble Valley	***13,980***	***13,980***	**-**
Rossendale	150	186	(36)
South Ribble	1,044	517	527
West Lancashire	96	30	66
Wyre	288	228	60
Manchester City Region	622	3,996	(3,040)
Liverpool City Region	84	201	(117)
Total	**24,202**	**28,873**	**(4,671)**

Source: Census 2001

3.25 In 2001, the Borough was a net exporter of labour at a level of some 4,671 workers. Table 17 shows, as might be expected because of their proximity, that there are strong commuting flows between Ribble Valley and Blackburn, Burnley, Hyndburn and Preston. The Borough also has a role as a supplier of labour to employment centres in the Manchester City Region. Trips from Ribble Valley to Greater Manchester account for almost two thirds of the net outflow.

3.26 The largest net inflow is from South Ribble. However, it is not clear if this includes commuting to the BAE Systems facility in Samlesbury, the bulk of which is in South Ribble Borough.

3.27 In 2001, 56.7 percent of Ribble Valley's employed residents also worked in the Borough. As Table 18 shows, this is a low rate of self containment when compared to other Lancashire local authority areas. Only in South Ribble, Fylde and Preston do a lower proportion of employed residents both live and work in the area.

Table 18 – Percentage of Labour Retained, 2001

Authority	Percentage of Indigenous Employment, percent
Lancaster	86.8
Pendle	72.5
Wyre	70.7
Blackpool	69.7
Rossendale	67.7
Chorley	65.7
Burnley	65.0
Blackburn	63.4
West Lancashire	62.3
Hyndburn	60.0
Ribble Valley	***56.7***
South Ribble	53.5
Fylde	49.8
Preston	48.3

Source: Census 2001

3.28 National experience is that commuting patterns differ between occupational groups. For example lower grade jobs tend to be filled by more local workers who travel less than 2 miles to the place of business. Higher grade workers are generally prepared to travel further (an average of 6 to 12.5 miles) and for up to an hour or more. Therefore out-commuting is more common among professionals and skilled workers.

Earnings

3.29 Table 19 shows that the average earnings of people living and working in Ribble Valley are above county, regional (and national levels when measured by place of residence). Indeed average weekly pay is higher in Ribble Valley than in any other local authority in Lancashire. It is notably higher than rates elsewhere in Pennine Lancashire.

Table 19 – Average Weekly Earnings

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Burnley	374.6	367.3
Chorley	355.7	410.9
Fylde	379.1	405.8

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Hyndburn	350.2	336.4
Lancaster	356.2	364.7
Pendle	363.1	362.4
Preston	370.3	331.6
Ribble Valley	***408.0***	***440.2***
Rossendale	324.3	378.7
South Ribble	368.8	373.4
West Lancashire	368.3	425.7
Wyre	343.6	355.9
Lancashire	**365.1**	**372.1**
Blackburn with Darwen	351.4	317.2
Blackpool	318.8	314.4
North West	**378.0**	**378.0**
England	**412.0**	**412.1**

Source: Annual Survey of Hours and Earnings 2012

Summary

3.30 Ribble Valley has a population of 57,132 people, comprising an economically active and skilled workforce. This is evidenced by the high proportions of people who work in professional occupations in the Borough, compared to the rest of Lancashire and the North West. It is also an affluent location, the least deprived local authority area in Lancashire.

3.31 The retail/wholesale and public sectors employ high proportions of people in Ribble Valley, although the levels of employment in these sectors do not generally exceed wider averages. The local manufacturing sector is also strong, accounting for 13.1 percent of jobs, above county, regional and national averages. However, much of this will be accounted for by employment at BAE Systems, Samlesbury.

3.32 Ribble Valley has a strong agricultural sector. In 2010, there were some 626 local farms employing 1,408 people. 82 percent of the total land area of the Borough is given over to farming.

3.33 Most of Ribble Valley's businesses employ less than ten employees (88.8 percent). Local employment premises are focused in the south of the Borough, near to the boundary with Burnley and Hyndburn local authorities (including Time Technology Park, Simonstone), and in North and East Clitheroe (Link 59, Primrose Industrial Estate and Salthill Industrial Estate).

3.34 In 2011, homeworking in Ribble Valley accounted for 14.6 percent of the working age population, greater than homeworking levels across Lancashire (10.2 percent), the North West (9.4 percent) and England (10.6 percent). High proportions of people work from home in the rural north east of the Borough.

3.35 In terms of commuting, the population of Ribble Valley is relatively mobile. In 2001 (the most recent published data), only 56.7 percent of the population both lived and worked in the Borough and Ribble Valley is a net exporter of labour. There are strong commuting flows between the Ribble Valley and Blackburn, Burnley, Hyndburn and Preston. The Borough also has a role as a supplier of labour to employment Centres in the Manchester City Region.

3.36 The average earnings of people both living and working in Ribble Valley are higher than elsewhere in Lancashire, and notably higher than elsewhere in Pennine Lancashire.

4.0 PROPERTY MARKET – GENERAL

Introduction

4.1 Prior to analysing the study area's property market by the individual components of sites, industrial and offices – commentary is provided about the study area as a whole. This comprises a review of the supply of premises along with information on general national property and business trends. It is important to understand the supply and demand for property, as this is the key driver affecting the market for employment land.

Property Supply

4.2 A schedule of the vacant floorspace being marketed in the study area (as at March 2013) has been compiled mainly from physical survey, a trawl of commercial property agents' websites and consultations with agents. The marketed space is taken to be a reasonably close approximation to that which is vacant – although there may be occupiers waiting for interest in their property before moving, and empty units not actually being marketed. The schedules for industrial (including warehouses and workshops) and offices have been included in Appendix 2.

Industrial

4.3 Table 20 shows that there is 25,959 sqm of marketed industrial floorspace, made up of 37 properties, in Ribble Valley. This is a reduction of around a quarter on the amount of floorspace that was available in 2008 (35,088 sqm, made up of 31 properties). However, it should also be noted that the vacant premises schedule of the 2008 Employment Land and Retail Study included one large (8,128 sqm) unit at Time Technology Park and a number of mid-sized units at Link 59 in Clitheroe. These are no longer on the market. At present there is only one large (5,000 sqm plus) unit available – Unit 3, Time Technology Park, Blackburn Road, Simonstone (6,875 sqm).

4.4 As was the case in 2008, the overwhelming majority of available properties are at Time Technology Park, Simonstone (which has 57 percent of the available units and 80 percent of the available floorspace) or Salthill Industrial Estate, Clitheroe (30 percent of the available units and 15 percent of the available floorspace). There is only one unit on the market in Longridge and one in the rural parts of the Borough (at Chatburn). There is no availability in Whalley. This is not significantly different from the position in 2008.

Table 20 – Amount of Marketed Industrial Property

Area		Size Band, sqm							Total
		0-100	101-200	201-500	501-1,000	1001-2,000	2,001-5,000	5,001+	
Simonstone (Time Technology Park)	Floorspace, sqm	488	104	1,909	731	1,672	9,012	6,875	20,791
	Number of Properties	9	1	5	1	1	3	1	21
Clitheroe (Salthill Industrial Estate)	Floorspace, sqm	-	356	2,098	1,487	-	-	-	3,941
	Number of Properties	-	2	7	2	-	-	-	11
Clitheroe (Link 59)	Floorspace, sqm	-	-	-	511	-	-	-	511
	Number of Properties	-	-	-	1	-	-	-	1
Elsewhere in Clitheroe	Floorspace, sqm	-	264	-	-	-	-	-	264
	Number of Properties	-	2	-	-	-	-	-	2
Longridge	Floorspace, sqm	97	-	-	-	-	-	-	97
	Number of Properties	1	-	-	-	-	-	-	1
Elsewhere in Ribble Valley	Floorspace, sqm	-	-	355	-	-	-	-	355
	Number of Properties	-	-	1	-	-	-	-	1
Total	**Floorspace, sqm**	**585**	**724**	**4,362**	**2,729**	**1,672**	**9,012**	**6,875**	**25,959**
	Number of Properties	**10**	**5**	**13**	**4**	**1**	**3**	**1**	**37**

Source: BE Group 2013

4.5 Small (0-100 sqm) workshops and larger units (greater than 1,001 sqm in size) are only readily available at Time Technology Park. Apart from one small unit in Longridge, other schemes only offer mid-sized properties of 101-1,000 sqm. Overall, the greatest availability is in the 201-500 sqm category.

4.6 Table 21 shows that the majority of marketed industrial space in Ribble Valley is of moderate quality. The quality appraisal comes from an external inspection only and considers building condition, style, specification, servicing areas, eaves height and rental level. Good quality premises only are available in Clitheroe, primarily at Hawthorne Industrial Estate (part of Salthill Industrial Estate). There is only one budget option, in Longridge. Again this is not dissimilar from the position in 2008.

Table 21 – Quality of Marketed Industrial Property

Area	Quality		
	Good	Moderate	Budget
Simonstone (Time Technology Park)	-	21	-
Clitheroe (Salthill Industrial Estate)	5	6	-
Clitheroe (Link 59)	-	1	-
Elsewhere in Clitheroe	2	-	-
Longridge	-	-	1
Elsewhere in Ribble Valley	-	1	-
Total	**7**	**29**	**1**

Source: BE Group 2013

4.7 The majority of premises (89 percent) are available leasehold (Table 22), including all marketed space at Time Technology Park. There are three workshops available to let or for sale in Clitheroe, while a 355 sqm industrial unit is for sale at Pendle Trading Estate, Chatburn. This is a different from 2008 when one fifth of the marketed units were exclusively freehold disposals.

Table 22 – Tenure of Marketed Industrial Property

Area	Tenure		
	Leasehold	Freehold	Either
Simonstone (Time Technology Park)	21	-	-
Clitheroe (Salthill Industrial Estate)	8	-	3
Clitheroe (Link 59)	1	-	-
Elsewhere in Clitheroe	2	-	-
Longridge	1	-	-
Elsewhere in Ribble Valley	-	1	-
Total	**33**	**1**	**3**

Source: BE Group 2013

Offices

4.8 Table 23 shows that there are 7,055 sqm of marketed offices (51 premises) in Ribble Valley. This more than double the supply in 2008 when only 24 premises (totalling 3,567 sqm) were on the market. The difference reflects greater availability at Time

Technology Park, Simonstone (with 25 suites on the market in 2013, compared to 15 in 2008); Salesbury Hall, Ribchester (which was not being marketed in 2008) and a number of other rural schemes.

4.9 82 percent of the premises are of 200 sqm or less, two thirds are of 100 sqm or less. There is only one property larger than 1,000 sqm – Suite 109, Time Technology Park, Blackburn Road, Simonstone (1,129 sqm).

4.10 Again Time Technology Park has the greatest supply with 69 percent of the available floorspace and 49 percent of the available units. This includes all but one of the nine available properties which are greater than 200 sqm in size. However, there are also options in a range of rural settlements, including Brockhall Village, Gisburn and Ribchester. In the case of Ribchester, Salesbury Hall has 12 suites available, in sizes ranging from 26 sqm to 132 sqm.

4.11 In Clitheroe, there are five available suites in the Town Centre (primarily at De Lacy Business Centre, Station Road), three within Salthill Industrial Estate and one at Primrose Studios in the south of the town.

4.12 Generally, the vacant office property offer of Ribble Valley in 2013 is far more extensive and diverse than was the case in 2008. Then 83 percent of the available properties were either in Time Technology Park or Clitheroe Town Centre. Three quarters of the premises were of 100 sqm or less and there were only two offices available that were larger than 500 sqm.

Table 23 – Amount of Marketed Office Property

Area		Size Band, sqm							Total
		0-50	51-100	101-200	201-500	501-1000	1001-2000	2001+	
Simonstone (Time Technology Park)	Floorspace, sqm	327	72	663	1,229	1,479	1,129	-	4,899
	Number of Properties	12	1	4	5	2	1	-	25
Clitheroe Town Centre	Floorspace, sqm	101	-	280	-	-	-	-	381
	Number of Properties	3	-	2	-	-	-	-	5
Clitheroe (Primrose Studios, Primrose Road)	Floorspace, sqm	16	-	-	-	-	-	-	16
	Number of Properties	1	-	-	-	-	-	-	1
Clitheroe (Salthill Industrial Estate)	Floorspace, sqm	-	121	-	-	616	-	-	737
	Number of Properties	-	2	-	-	1	-	-	3
Brockhall Village (Brockhall Business Centre)	Floorspace, sqm	-	176	-	-	-	-	-	176
	Number of Properties	-	2	-	-	-	-	-	2
Barrow (The Printworks)	Floorspace, sqm	50	-	-	-	-	-	-	50
	Number of Properties	1	-	-	-	-	-	-	1
Gisburn (Gisburn Business Park)	Floorspace, sqm	-	-	174	-	-	-	-	174
	Number of Properties	-	-	1	-	-	-	-	1
Longridge (The Business Centre, Stanley Street)	Floorspace, sqm	34	-	-	-	-	-	-	34
	Number of Properties	1	-	-	-	-	-	-	1
Ribchester (Primarily Salesbury Hall)	Floorspace, sqm	261	195	132	-	-	-	-	588
	Number of Properties	8	3	1	-	-	-	-	12
	Floorspace, sqm	**789**	**564**	**1,249**	**1,229**	**2,095**	**1,129**	**-**	**7,055**
	Number of Properties	**26**	**8**	**8**	**5**	**3**	**1**	**-**	**51**

Source: BE Group 2013

4.13 The available office space is all of moderate quality and all units are to let. There are no freehold options on the market in Ribble Valley. By comparison, in 2008 there were two buildings available on a freehold basis.

Valuation Office Data

Industrial

4.14 According to the latest Valuation Office (VO) statistics (2008) there are 580 industrial hereditaments in the Borough, totalling 380,000 sqm. Out of all this space there are 37 marketed premises totalling 25,959 sqm (see Table 20 above). This suggests an overall 'occupancy rate' for Ribble Valley of 93.2 percent by floorspace. By premises numbers, the 'occupancy rate' is 93.6 percent. This compares to occupancy rates of 91.5 percent by floorspace and 94.2 percent by premises numbers in 2008.

Offices

4.15 There are 228 office hereditaments in the study area, totalling 25,000 sqm. Out of all this space there are 51 marketed premises totalling 7,055 sqm (see Table 23 above). This suggests an overall 'occupancy rate' for the study area of 71.8 percent by floorspace. By premises numbers the overall 'occupancy rate' is 77.6 percent.

4.16 These are far lower occupancy rates than in 2008, when occupancy was 87.3 percent by floorspace and 91.5 percent by premises numbers. The explanation for this is that the number of vacant units (and the amount vacant floorspace) has increased between 2008 and 2013, while the total number of hereditaments has (slightly) decreased. The 2007 VO statistics (used in the 2008 Employment Land and Retail Study) recorded that there were 253 office hereditaments in the study area, totalling 28,000 sqm. It is not clear why there was such a reduction of office accommodation over the 2007-2008 period (with 25 office properties and 3,000 sqm of floorspace lost).

Modern Occupier Needs

4.17 In this sub-section the report outlines what modern businesses are looking for in terms of their property, as well as those developers providing space for them. These are general comments and apply across the UK, as well as in the study area.

4.18 There are two key property sub-markets to consider in understanding the demand for premises. The first is the demand from companies looking for sites for their own occupation; the second, which is necessarily derived from the first, comes from specialist property developers who will provide solutions for these companies.

4.19 Many end-user companies, especially small ones, looking for accommodation prefer occupying an existing building to either organising the construction of one for themselves or entering into a design and build agreement with a developer. This is due to the management time involved; while it may also be difficult to rationalise and visualise such an important acquisition off-plan.

4.20 Having premises built for owner occupation requires a long lead-time to cover the planning, negotiation and construction time involved. Furthermore not every company wants a brand new building, partly because they are generally more expensive than second-hand ones.

4.21 However the recent combination of low interest rates and the depressed stock market has led to an unusually large number of companies looking to own their premises (although current market conditions have softened this due to the lack of available finance). One route to achieving this is by developing their own site, especially if they cannot find a suitable freehold property. Nationally most requests for such small sites to enable self-build are of less than 0.4 ha in size.

4.22 Although design and build options can be convenient, they are quite expensive because the controlling developer makes its profit not only on the land sale, but also on managing the building process. Consequently if the company is able, some prefer to buy land direct and organise building contractors themselves. This is especially the case with lower value added industries where high quality buildings are of secondary importance. However without strong planning control this scenario can lead to business areas of lower aesthetic value and layout.

4.23 Developers acquiring sites consider the nature of the market, as outlined above, as well as the potential for speculative development, i.e. riskier, supply-led, rather than demand-driven construction. They also prefer to acquire prominent, (easy to develop) greenfield sites close to arterial roads or motorways because irrespective of sustainable transport policies, private transport still predominates. They naturally want land that is attractive to end-users. Furthermore property development is intensely entrepreneurial and extremely price sensitive. So although land may be available on the open market, if it is at too high a price, then the developer will not acquire it.

Emerging Property Trends

Industrial

4.24 Occupiers are generally looking for smaller premises as average company size continues to decrease. In line with rising aspirations and a concentration on higher value added activities, companies are looking for higher quality accommodation. In rural areas company sizes are generally already small; and the desire for high quality is less of a priority due to affordability issues. Successful industrial businesses typically require dedicated, self-contained, secure yard areas, and for units over 2,000 sqm the trend seems to be at least one dock level loading bay and a 40 metre turning circle to allow heavy goods vehicles access into and out of the unit. Eaves heights are also continuing to rise from an average of six metres to more towards ten metres to allow storage racking and more efficient use of space. For B8 high bay warehousing eaves heights can now be 15 metres to accommodate automatic racking systems. Indeed some are as much as 40 metres high.

4.25 Large requirements, above 10,000 sqm, are comparatively rare, and where they do exist are generally for distribution warehousing. Most of these are contract-led with a flurry of activity as a number of specialist distribution companies look for units, before one of them secures the contract on offer. However these companies generally cannot wait for a bespoke warehouse to be built for them and so, due to the rarity of such large, available buildings their search areas are increasingly wide.

4.26 Freehold demand is relatively strong as a result of low interest rates, poor stock market pension performances and increased private sector interest in property investment. However the lack of available finance is constraining this sub-market currently. This previously resulted in an overheated investment market, rising values, lowering yields and led to property developers being more willing to offer speculative, freehold buildings. However, as a consequence of the recent prolonged recession speculative development has stopped dead across much of the country. It may resume once the effects of the recession recede, but in more rural areas speculative development will never be commonplace.

4.27 Outsourcing of many aspects of the production and distribution process has led to a declining need for traditional, large scale, all-encompassing manufacturing facilities. This is gradually being replaced by smaller, sub-assembly light manufacturing space. Shorter leases (five years) and break clauses (three years) are now becoming much more common.

Offices

4.28 For offices the trend is for smaller suites as average business sizes fall. There are two strands to this. Micro-businesses (those with less than ten employees) want serviced offices or similar types of easy-in, easy-out schemes that lower their risk of exposure. Small businesses (with 10-49 employees) are looking for offices in the region of 150-300 sqm. Often they are satellite facilities for larger companies.

4.29 Improving technology means specifications are changing, for example wireless networks may soon make raised floors superfluous and make the conversion of Victorian and other similar buildings easier.

4.30 In line with rising aspirations and a concentration on higher value added activities, successful companies are looking for higher quality accommodation. For example air conditioning is becoming almost a standard requirement in new schemes, which pushes up rentals by £5-10/sqm on average. Furthermore some occupiers (looking for more than 200 sqm) increasingly want self-contained premises, i.e. their own front door, toilets, reception, utilities, etc. There is increasing demand for relatively short leases (one to three years), which helps account for the increasing popularity of serviced offices.

4.31 Prior to the credit crunch, freehold demand was strong as a result of low interest rates, poor stock market pension performances and increased private sector interest in property investment. However, as with the industrial market, the recession and lack of available finance is constraining this sub-market and has largely eradicated speculative development, outside of major city centres.

4.32 Occupiers requiring higher skills, especially those linked to key growth sectors will be concerned about access to an appropriate pool of skilled labour, which will drive demand towards city centres, research facilities and higher education institutes.

4.33 Property will need to be increasingly flexible to accommodate research-based manufacturing space as more complex processes develop, but still within an office environment.

4.34 Clustering around like-minded companies will also drive demand to key business park locations, with good availability of 'white collar', knowledge-based, skilled staff. Other businesses will require central urban locations such as the professions and creative industries, where face-to-face contact is important or where public transport is important to attract staff.

Summary

4.35 There is more than three times as much industrial floorspace available as there is office. It is concentrated in Time Technology Park, Simonstone and Salthill Industrial Estate, Clitheroe. There are few units above 1,000 sqm while small (0-100 sqm) workshops are only readily available at Time Technology Park. Supply is very limited in Longridge and there is no available space in Whalley or in most rural settlements. Good quality units are focused in Clitheroe, primarily at Hawthorne Industrial Estate. There is very little freehold availability.

4.36 The Borough's office supply is mostly small (0-200 sqm). Although the majority of the supply is at Time Technology Park or in Clitheroe (including all the larger suites) there is at least some availability in a range of rural settlements. Most space is of moderate quality, and there are no freehold units on the market.

4.37 The overall occupancy rates of Ribble Valley are lower in 2013 than was the case in 2008. This is particularly the case in terms of office occupancy, where rates have fallen from 87.3 percent to 69.8 percent by floorspace and from 91.5 percent to 74.7 percent by premises numbers. This partially reflects an apparent decrease in the number of office hereditaments over the 2007-2008 period. However, even allowing for this there is clearly far more property on the market today than was recorded in the 2008 Employment Land and Retail Study.

4.38 Modern businesses and developers want easily developable, accessible and usually prominent sites for their premises. A healthy property market should provide a mix of options including speculative developments; design and build schemes, and freehold plots for owner occupiers to self-build. However, property development is entrepreneurial and not all companies that are looking for space can realistically be satisfied all the time. The property market, by nature, is inherently imperfect. Companies will, however, generally seek to move from existing property to provide themselves with better, more efficient, cost effective accommodation of an approximate size.

4.39 Modern trends are expected to lead to a greater number of businesses that are smaller in size, which are more dynamic and technology driven and which will come and go more fluidly.

5.0 PROPERTY MARKET – ANALYSIS

Introduction

5.1 This section considers the more detailed issues related to supply and demand within the Borough as a prelude to assessing the future need for land.

5.2 The section presents the comments of private sector stakeholders on Ribble Valley's industrial and office property markets. The industrial market refers to accommodation for manufacturing, storage, distribution and warehousing purposes including smaller workshop premises. It should be noted that the owners and managers of Time Technology Park, Blackburn Road, Simonstone, one of the Borough's large existing developers, declined to participate in the study.

5.3 Private sector stakeholders made a range of comments regarding the local market. Their views have been summarised in a series of tables. Table 24 provides a breakdown of the comments received on the Borough's employment land supply.

Table 24 – Property Market Comments – Land

Contact	Comment
Regional Agent	Employment land allocations should be focused along the A59, particularly on sites east of Clitheroe. Recent planning permissions at Barrow Brook Business Park for B1, B2, B8 uses show that the Park remains of interest to developers.
Local Agent	Marketing land at Barrow Brook Business Park. No real interest or enquiries in recent years. Developers don't have the confidence to consider speculative developments. Feels that gap funding, or an element of higher value uses, will be required to kick-start any development at Barrow Brook.

Source: BE Group, 2013

5.4 Table 25 provides a summary of the comments received from stakeholders with regards to the local industrial property market.

Table 25 – Property Market Comments – Industrial

Contact	Comment
Regional Agent	Available units let quickly. Demand is from local firms for units of up to 1,000 sqm. Demand is mostly from traditional business sectors, but can include non-employment uses such as fitness studios. Get regular enquiries for space.
Regional Agent	There is an oversupply of available space and rents/values are comparatively low. There is unlikely to be any new development in

Contact	Comment
	the near future. Low land values for industrial uses are encouraging landowners to seek residential uses on their land. Feels this could be solved by the Council acquiring vacant land to release plots directly to owner occupiers.
Regional Agent	Time Technology Park is popular with storage companies as it offers cheap warehouse space with good access to the M65.

Source: BE Group, 2013

5.5 To understand agent and developer comments in more detail, the performance of multi-let industrial schemes in Ribble Valley are compared. Details are shown in Table 26. The multi-let schemes shown are not a totally comprehensive list; it is a selected sample as it is not always possible to identify all existing schemes. Nor is it possible to get the required information on all schemes, e.g. some landowners will not co-operate. However this remains a good sample of the schemes out there.

5.6 As can be seen, industrial schemes in Ribble Valley appear to be performing well, despite the persistence of recessionary conditions. High occupancy rates occur not just in the main economic centre of Clitheroe, but across the Borough. Occupancy rates in rural schemes are as high, and often higher, as those in Clitheroe. Any scheme with an occupancy rate of 90 percent can be assumed to be effectively at full occupancy given the expected turnover of tenants associated with smaller space provision.

Table 26 – Industrial Multi-Let Scheme Performance

Scheme Name	Total Floorspace, sqm	No. Units (Size Range, sqm)	Occupancy Rate	Comment
Fairfield Business Park, A59 Longsight Road, Clayton-le-Dale	1,300	8 (85-200)	100	Farm conversion Prominently located on the A59 Dominated by trade/motor trade uses including Fairfield Valeting Centre. Includes a café and butchers shop Serviced scheme, facilities include IT, bookkeeping and business support
Whalley Industrial Park, Barrow	3,251	20 (50 – 300)	100	Converted feed mill Popular with start-up businesses

Scheme Name	Total Floorspace, sqm	No. Units (Size Range, sqm)	Occupancy Rate	Comment
				Occupiers include Air Cycle Repair Rents from £45/sqm A good performing scheme with a healthy level of enquiries
The Sidings, Whalley	1,700	19 (50 – 100)	100	Fully occupied for some time Occupiers include Solar Largely an office location
Mill Lane Industrial Estate, Gisburn	800	4 (200 each)	100	Small rural industrial estate north of Gisburn Auction Mart Occupiers include Lawntrack Supplies
Link 59 Business Park, Clitheroe	16,250	52 (250 – 2000)	98	JGB Investments own Modern, high quality self contained and terraced units. Key source of good quality space in the Borough Occupiers include Travis Perkins, Bailey Development and West Coast 4x4 Scheme performing well and largely full
Bee Mill, Ribchester	6,040	32 (19 – 1,300)	91	Converted mill space, the main source of accommodation in Ribchester Offers office, industrial and retail units Wide range of occupiers, including motor trade businesses and creative industries Mix of start-up and relocating businesses Rents from £30/sqm Expansion space exists for four further industrial units.
Time Technology Park, Blackburn Road, Simonstone	37,400 (industrial/ warehouse space)	55 (approx) -. Industrial/ warehouse units (37 – 9,290)	65	Owned by GET Most significant multi-let scheme in the Borough Also has some offices (see below)

Scheme Name	Total Floorspace, sqm	No. Units (Size Range, sqm)	Occupancy Rate	Comment
Simonstone				Occupiers include First Rail Supplies Offers small workshops (37-91 sqm), mid-sized units (around 232 sqm) and larger warehouses (465-9,290 sqm) Serviced scheme, facilities include 24 hr security, café, IT support, back up generators, administrative support, maintenance support 600 car parking spaces available Rents from £10/sqm Borders Burnley and Hyndburn Boroughs, close to J8, M65.

Source: BE Group, 2013

5.7 Table 27 provides a summary of the comments received on the local office property market.

Table 27 – Property Market Comments – Office

Contact	Comment
National Agent	Agents for the Root Hill Estate, Dunsop Bridge on behalf of the Duchy of Lancaster. Of the six offices, three have a planning permission for a change of use to housing. This will require the relocation of one tenant. The remaining three will be retained in employment use, with occupiers including Lancashire County Council and two local businesses. The local office market is weak and the Duchy has no plans for any further commercial development in Dunsop Bridge.
Regional Agent	The office market is oversupplied, with around 5,600 sqm currently vacant. This is several years' supply for the Borough. Rents are also relatively low, around £100/sqm for new/modern premises and around £70/sqm for second hand space. Together these issues make it unlikely that there will be any new build office development in Ribble Valley in the next 5 years.
Regional Agent	Some demand for small offices of 19-46 sqm. The most successful recent scheme has been Manor Court in Ribchester. Although some distance from the A59, the high quality of this scheme and its high speed broadband connectivity, have made Manor Court popular with local occupiers. Rents of around £110/sqm have been achieved there.
Local Manager	Manage Fern Court Business Centre, Clitheroe. The scheme is fully occupied and has (for the most part), been so for several years. When units do become available, they usually let quickly. Demand has reduced during the recession, but still get occasional requirements for

Contact	Comment
	space.
Local Manager	Manage Primrose Studios, Clitheroe. Reasonable demand from local businesses, but the scheme has also seen a high turnover of tenants.

Source: BE Group, 2013

5.8 To understand demand in more detail, the performance of selected multi-let office and mixed schemes is shown in Table 28. Again the multi-let schemes shown are a selected sample.

5.9 There are a reasonable number of business centres in the Borough. These include a range of rural schemes as well as options in Clitheroe Town Centre. Established schemes, including Fern Court Business Centre in Clitheroe; The Printworks, Barrow Brook Business Park; Gisburn Business Park, Gisburn; Brockhall Business Centre, Brockhall Village and Asturian House, Ribchester are all reasonably successful, with occupancy rates of 75-100 percent. These schemes perform an important role, providing small business accommodation (of varying quality) to local start-up and existing micro businesses. Several serve large rural catchment areas.

5.10 There are a number of recently refurbished business centres which have low occupancy rates. Generally, the managers/agents of these schemes report that it is taking time to attract occupiers to new locations. However, most feel that, given time and an improving market, they will be able to fill the vacant space.

5.11 Comparison with the 2008 Ribble Valley Employment Land and Retail Study, suggests that local multi-let schemes are performing at about the same rate they were five years ago, with no significant reductions (or improvements) in occupancy.

Table 28 – Office and Mixed Multi-Let Scheme Performance

Scheme Name	Total Floorspace, sqm	No. Suites (Size Range, sqm)	Occupancy Rate, percent	Comment
Poors'land Barn, Slaidburn	360	9 (20 – 50)	100	Rural workspace scheme Fully occupied within six months of completion Diverse range of occupiers, including a hairdresser and an ecologist

Scheme Name	Total Floorspace, sqm	No. Suites (Size Range, sqm)	Occupancy Rate, percent	Comment
Fern Court Business Centre, Castlegate, Clitheroe	225	8 (13-62)	100	Small, good quality business centre in Clitheroe Town Centre Marketed to start-up businesses Units available on three year leases, with 3 months notice required to quit Serviced scheme, facilities include reception, meeting room, business support
Root Hill Estate Yard, Whitewell Road, Dunsop Bridge	610	6 (37-161)	100	Owned by the Duchy of Lancaster (part of the Whitewell Estate) High quality conversion of estate buildings to provide accommodation in a rural part of the Borough Of the six offices, three have a planning permission for a change of use to housing. The remaining units are let, with occupiers including Lancashire County Council.
The Printworks, Whalley Road, Barrow Brook Business Park, Barrow	2,000	10 (50 – 200)	90	Good quality office scheme in the largely undeveloped Barrow Brook Business Park Prominently located off the A59 Rents from £150/sqm
Gisburn Business Park, Gisburn Road, Gisburn	690	6 (65 – 200)	83	Farm conversion A good performing rural scheme Rents from £85/sqm
Primrose Studios, Primrose Road, Clitheroe	372	5 (13-16)	80	Small, recently refurbished office building in the south of Clitheroe In a primarily industrial area, the property has low prominence

Scheme Name	Total Floorspace, sqm	No. Suites (Size Range, sqm)	Occupancy Rate, percent	Comment
Brockhall Business Centre, Brockhall Village	5,700	6 (87-89)	75	Small, modern business centre Prominently located at the entrance to Brockhall Village, off the A59 Rents are £120/sqm plus a service charge of £40/sqm
Asturian House, Ribchester	330	4 (40 – 100)	75	Brindle Developments own Part of a former hospital site Historically fully let
Time Technology Park, Blackburn Road, Simonstone	6,503 (office space)	51 (approx*) - offices (22 – 1,115)	51	Owned by GET Most significant multi-let scheme in the Borough Also has some industrial/warehouse units (see above) Offers small offices (23 sqm,1-4 people), mid-sized suites (38-260 sqm, 5-15 people) and larger offices (743-1,115 sqm, 50-100 people) Offers managed start-up units (with shared meeting, kitchen, recreation rooms and video conference suites), serviced suites and call centre space Serviced scheme, facilities as described in Table 27 600 car parking spaces available Rents from £30/sqm Borders Burnley and Hyndburn Boroughs, close to J8, M65.
Manor Court, Salesbury Hall, Ribchester	1,200	13 (21-465)	15	Good quality conversion of rural buildings Main source of office space in Ribchester Reasonable initial

Scheme Name	Total Floorspace, sqm	No. Suites (Size Range, sqm)	Occupancy Rate, percent	Comment
				demand, but taking time to let suites Phase II (17 office suites of 21-79 sqm) proposed
De Lacy Business Centre, Station Road, Clitheroe	211	4 (22-110)	0	Comprises the second floor of a recently completed office building in Clitheroe Town Centre Properties offered as a multi-let business centre, but also available as a whole Rents from £100/sqm

Source: BE Group, 2013

**Space can be sub-divided in a variety of ways.*

Summary

5.12 Ribble Valley has a primarily local property market in both the industrial and office sectors. There is little, if any, inward investment.

5.13 Across the Borough, agents feel there is an oversupply of available office premises. Office rents are low (around £100/sqm for new/modern space, and around £70/sqm for second had accommodation) and these factors are discouraging the development of new office space.

5.14 However, despite this general weakness in the market, local office schemes and business centres are performing well. These schemes perform an important role, providing small business accommodation (of varying quality) to local start-up and existing micro businesses. Several serve large rural catchment areas. Most have occupancy rates of 75-100 percent. Manor Court, Ribchester is cited as an example of a successful recent development, which compensates for its poor accessibility with high build quality and high speed broadband service. Demand is for small suites of less than 50 sqm.

5.15 The exception to this appears to be Root Hill Estate Yard, Dunsop Bridge where the Duchy of Lancaster has secured a change of use, to residential, on three of the six office units. As justification for this change, the scheme's agents indicate that there is little demand for office space in this isolated rural location.

5.16 Agents only made limited comments on the industrial market. Again the view is that while there is a borough-wide oversupply of industrial premises, and rents/values are generally low, local schemes appear to be performing well. Industrial schemes are well occupied, both in Clitheroe and in rural areas. Demand is for units of up to 1,000 sqm.

5.17 The owners/managers of Time Technology Park were unwilling to comment for this study. However, other agents note that the scheme is popular with storage companies as it offers cheap warehouse space with good access to the M65.

5.18 Agents made differing comments about the prospects for new development at Barrow Brook Business Park. The most common view was that low land values and a lack of demand is encouraging landowners to seek higher value (residential) uses on their land. There is little prospect of speculative development, for employment, in the short/medium term. However, others noted that owners are still seeking planning permissions for B1, B2, B8 uses, evidence that owners/developers still believe that employment uses can (in an improving market) be brought forward at this location.

6.0 EMPLOYMENT LAND

Introduction

6.1 This section looks at the existing portfolio of potential employment land in the study area, not only how much there is, but also its quality, type, suitability and availability. Ribble Valley needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices. By initially establishing how much land there is, the second task is to consider how much land is needed in the future (to 2028), which is picked up in the forecasting section later in the report.

6.2 In calculating the existing land supply and future needs from now until 2028, it is important to set a base date for the analysis. For this report, that date is 31st March 2012. This means that any employment planning permissions approved since 1st April 2012 do not affect the identified land supply, neither do any site completions which occurred after that date.

Land Supply

6.3 The Council tracks a large number of sites as part of its annual monitoring. However an assessment of them indicates that most are to be excluded on the basis that they are below the 0.25 ha threshold (contained in ODPM Employment Land Review Guidance), or refer to building conversions, changes of use or rebuilds rather than being sites. In most cases the proposed employment floorspace has been given an equivalent employment land figure using a multiplier of 3,900 sqm/ha. This equates to a typical industrial estate/business park development density for both office and industrial schemes. Appendix 3 outlines the assumptions made about sites included in the Council's monitoring records, explaining why certain sites have been deleted or why revised site areas have been used.

6.4 Table 29 schedules the employment sites (of 0.25 ha or larger) in Ribble Valley. It outlines their sizes; provides comments on current status (e.g. owner intentions) together with an assessment as to when they might come forward for development or use. This assessment of timescale is based upon a number of factors – market demand, overview (from discussions with stakeholders and site owners), ownership situation, planning status, infrastructure and services required. Proformas for each site (which include plans) are provided at Appendix 4.

Table 29 – Employment Sites Schedule

Name	Size, ha	Comment/Update	Availability, years
Papillion Site (2), Barrow Brook Business Park, Barrow	4.32	Owner (Papillion Properties) is now in receivership A previous full planning permission for 8,746 sqm of B1(a) office floorspace has now lapsed. An outline application for 104 dwellings on the site was allowed at appeal. Sale of the land to a (confidential) housebuilder is underway Industrial/office Greenfield Unserviced	0-1
Land North of Barrow Brook Business Village, Barrow	3.33	Admiral Taverns own Outline planning permission for 12,975 sqm of B1/B2/B8 office/industrial floorspace The owner is now considering next steps, which may include a sale to, or joint venture with, a developer Competes with an additional application by Newclose Properties for B1, B2, B8 uses, on the same land. Newclose hold a ransom strip which is required to connect this land with the existing business park The owner has aspirations for housing on land to the west, fronting Whalley Road, and may wish further housing developed on the site Industrial/office Greenfield Unserviced	1-3
BAE Systems, Samlesbury Aerodrome, Myerscough Road, Balderstone	2.69	BAE Systems own Within the secure site (not related to the Enterprise Zone) Development of 10,489 sqm of B1(a) office and B2 industrial premises, for BAE's own use, has now been completed. Industrial/office Brownfield Serviced	0-1
Land off Hey Road, Barrow Brook Business Village, Barrow	2.43	Newclose Properties and Athertons own Outline planning permission for B1/B2/B8 office/industrial floorspace Competes with an additional application by Admiral Taverns for 12,975 sqm of B1, B2, B8 uses, on the same land Industrial/office Greenfield	1-3

Name	Size, ha	Comment/Update	Availability, years
		Unserviced	
Building 611, Samlesbury Aerodrome, Myerscough Road, Balderstone	2.38	BAE Systems own Within the secure site (not related to the Enterprise Zone) Development of a 9,300 sqm B1(a) office building, for BAE's own use, has now been completed. Office Brownfield Serviced	0-1
Hindle and Schofield Site, Barrow Brook Business Park, Barrow	1.19	Private developer owned Previous planning permission for 2,271 sqm of B1(a) offices has now lapsed Site continues to be marketed for offices, available as managed suites or long leaseholds, of 93-2,044 sqm Agent reports no interest in this land over the last five years Owner lacks the finance to develop speculatively. Has considered a mixed-use scheme, including housing, but has been unable to find a development partner Owner/agent view is that this site cannot be brought forward without an element of higher value uses to kick-start development. Office Brownfield Unserviced	3-5
Papillion Site (1), Barrow Brook Business Park, Barrow	1.00	Owner (Papillion Properties) is now in receivership A previous full planning permission for B1/B2/B8 floorspace has now lapsed. The land is now on the market, for sale, for a range of commercial or leisure uses. The land could be sold as a single site or as plots of 0.2 ha or more. Industrial/office Brownfield Unserviced	1-3
Casting Foundry Site, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	0.87	Fort Vale Engineering own Full planning permission for 3,412 sqm B2 Investment Casting Foundry, for Fort Vale's own use Fort Vale expect that development of this facility will commence after completion of the extension to Building S (discussed below). Industrial	0-1

Name	Size, ha	Comment/Update	Availability, years
		Brownfield Serviced	
Rear of Building S, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	0.50	Fort Vale Engineering own Full planning permission for a 1,951 sqm B1(c)/ B2 extension to an existing building (Building 'S'), for Fort Vale's own use Fort Vale expect that development of this facility will commence within 4 months Industrial Brownfield Serviced	0-1
Land at Salthill Industrial Estate, Lincoln Way, Clitheroe	0.46	Jacksons Haulage own Presently an active haulage yard with a 470 sqm B8 warehouse on the site Outline planning permission for 1,508 sqm of B1(c)/B8 industrial/trade floorspace, plus full planning permission for a further 294 sqm of B8 trade floorspace One unit will be retained for Jacksons Haulage's own use. A further five buildings, 300-900 sqm in size, are on the market, to let (or for long leasehold) as design and build options. Marketed as Ajax Business Park, one unit is let to date. Industrial Brownfield Serviced	1-3
Land Adj. to Simonstone Lane, Time Technology Park, Simonstone	0.45	GET own Adjacent to former coal yard and housing Previous outline permission 1,769 sqm of office and industrial floorspace has now lapsed No change from 2008 study although landowner retains the aspiration to develop on this site Industrial/office Brownfield Unserviced	5+
B Dugdale and Son, Bellman Mill, Salthill, Clitheroe	0.38	B Dugdale and Son (Dugdale Nutrition) Full planning permission to demolish existing offices and develop a new office for Dugdale Nutrition, plus seven B1(c) light industrial units (1,476 sqm in total) The office building is now complete, with 121 sqm of first floor office space on the market, to let. The industrial units will be developed as a	1-3

Name	Size, ha	Comment/Update	Availability, years
		separate phase. A further five industrial units are also being considered, on a site presently occupied by a pet food warehouse. Industrial/office Brownfield Serviced	

Source: BE Group/RVBC, 2013

6.5 There are 12 sites totalling 20.00 ha. This compares to 11 sites totalling 15.33 ha in the 2008 Ribble Valley Employment Land and Retail Study. The increased land supply position in 2013, reflects the substantial planning permissions at Samlesbury Aerodrome (19,789 sqm of office, research and manufacturing facilities on 5.07 ha) and Fort Vale Engineering (5,363 sqm of expanded industrial facilities on 1.37 ha), which were not included in the previous study. It also reflects changes in how site sizes are measured in 2013 (i.e. using a multiplier of 3,900 sqm/ha, as discussed above) compared to how they were measured in 2008.

Sites Analysis

6.6 Table 30 shows how the land is distributed through Ribble Valley. 61 percent of the land is at Barrow Brook Business Park and around a quarter is at Samlesbury Aerodrome (and is for the exclusive use of BAE Systems). The remaining land is either at Simonstone (Fort Vale Engineering and Time Technology Park) or Salthill Industrial Estate, Clitheroe. There is no employment land in Longridge, Whalley or the rural parts of the Borough.

Table 30 – Distribution of Employment Land

Area	Number of Sites	All Employment Land, ha	Serviced Land, ha
Barrow Brook Business Park	5	12.27	-
Samlesbury Aerodrome, Balderstone	2	5.07	5.07
Simonstone	3	1.82	1.37
Clitheroe (Salthill Industrial Estate)	2	0.84	0.84
Total	**12**	**20.00**	**7.28**

Source: BE Group 2013

6.7 Out of the total land supply of 20.00 ha, just over 36 percent (7.28 ha) is serviced. Most of the serviced land is either at BAE Systems, Samlesbury Aerodrome or Fort Vale Engineering, Simonstone. In both cases, these sites are being held as expansion land for the respective operators. Serviced land at Salthill Industrial Estate, Clitheroe (B Dugdale and Son and Land at Salthill Industrial Estate) is also being held for industrial/trade developments.

6.8 A site is assumed to be serviced if utilities and road access are readily available. This would apply to infill sites in existing employment areas or where major sites have been opened up. Large allocations, where although services run to the edge of the site they have not been provided into the site itself, are not considered to be serviced. For this reason, the 12.27 ha at Barrow Brook Business Park (which mostly comprises undeveloped greenfield/brownfield land) cannot be considered serviced until the relevant infrastructure is delivered and development plots prepared.

6.9 Land is divided between two types of uses – office and industrial (which can include B8 warehousing). Table 31 shows that almost three quarters of the Borough's land could be suitable for either use. This includes most land at Barrow Brook Business Park, apart from the Hindle and Schofield Site. Development at Fort Vale Engineering will be for industrial uses, notably a 3,412 sqm Investment Casting Foundry.

6.10 Office land is on the market at Barrow Brook Business Park (the Hindle and Schofield Site), although the relevant planning permission for 2,271 sqm of B1(a) offices has now lapsed. BAE Systems has also recently completed an office development (Building 611) at Samlesbury Aerodrome.

Table 31 – Anticipated Land Use

Site Type	**Total, ha (number of sites)**
Office	3.57 (2)
Industrial	1.83 (3)
Office / Industrial	14.60 (7)
Total	**20.00 (12)**

Source: BE Group 2013

6.11 Each site has been assessed for its expected availability, the point at which it may come to market or be developed. This is derived from consultations with owners, agents, the Council and other evidence gathered in this study.

6.12 As Table 32 shows that 54 percent of the land supply (10.76 ha) is immediately available for development. This includes the 5.07 ha at Samlesbury Aerodrome, where development has now been completed (after the 31st March 2012 base date). It also includes land at Fort Vale Engineering. Fort Vale indicate that they will begin work on the Building S extension in the next few months, followed by the Investment Casting Foundry, when that extension is complete. Take-up of the Papillion Site (2), Barrow Brook Business Park, is also likely in the short term, although it is expected that this site will be lost to housing.

6.13 Most land at Brook Business Park will not be brought forward in less than a year. However, with the exception of the Hindle and Schofield Site, owners do appear to be proceeding with planning proposals (or land disposals) which may see development activity begin in the medium term. Thus as much as 92 percent of the land supply (18.36 ha) could become available over the next three years. This compares to only 74 percent in 2008, and emphasises that at least some progress is being made in delivering the major employment sites of the Borough.

Table 32 – Land Availability

Area	**Hectares Available, years (Number of Sites)**				
	0-1	**1-3**	**3-5**	**5+**	**Total**
Barrow Brook Business Park	4.32 (1)	6.76 (3)	1.19 (1)	-	12.27 (5)
Samlesbury Aerodrome, Balderstone	5.07 (2)	-	-	-	5.07 (2)
Simonstone	1.37 (2)	-	-	0.45 (1)	1.82 (3)
Clitheroe (Salthill Industrial Estate)	-	0.84 (2)	-	-	0.84 (2)
Total	**10.76 (5)**	**7.60 (5)**	**1.19 (1)**	**0.45 (1)**	**20.00 (12)**

Source: BE Group 2013

6.14 Only one site (Land Adj. to Simonstone Lane, Time Technology Park, Simonstone – 0.45 ha) may not come forward inside five years.

Site Grading

6.15 As was undertaken in the 2008 study, all sites have been graded using a standard scoring system (see Appendix 5). Each site is scored out of a 100, made up of ten individual measures, each scored out of ten. These are: proximity to the strategic highway network, proximity to the motorway network, prominence, access to public transport, planning status, access to services, constraints, environmental setting, flexibility and availability. The detailed scores are provided in Appendix 6.

6.16 The scoring illustrates how attractive the site is to developers and occupiers. It gives an appraisal of the overall quality of the land resource. However, the location needs of certain occupiers, linked to the specialist sectors, means that their choice is limited and an otherwise very poor quality site, might be suitable for them (and indeed may be one of very few options available nationally and even internationally).

6.17 Two scores are provided in Table 32, a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic highway proximity, motorway proximity, prominence, environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are easier to improve and hence provide the ability to raise the quality of a site.

Table 32 – Employment Sites Scoring

Name	Location	Size, ha	Score, max 100	Market - led Sub-total	Land Type
BAE Systems, Samlesbury Aerodrome, Myerscough Road	Balderstone	2.69	89	44	Brownfield
Building 611, Samlesbury Aerodrome, Myerscough Road	Balderstone	2.38	88	43	Brownfield
Papillion Site (2), Barrow Brook Business Park	Barrow	4.32	79	43	Greenfield
Casting Foundry Site, Fort Vale Engineering, Calder Vale Park,	Simonstone	0.87	76	31	Brownfield

Name	Location	Size, ha	Score, max 100	Market - led Sub-total	Land Type
Simonstone Lane					
Rear of Building S, Fort Vale Engineering, Calder Vale Park, Simonstone Lane	Simonstone	0.50	76	31	Brownfield
Land off Hey Road, Barrow Brook Business Village	Barrow	2.43	75	43	Brownfield
Papillion Site (1), Barrow Brook Business Park	Barrow	1.00	75	43	Brownfield
Land North of Barrow Brook Business Village	Barrow	3.33	73	43	Greenfield
Hindle and Schofield Site, Barrow Brook Business Park	Barrow	1.19	68	41	Brownfield
Land at Salthill Industrial Estate, Lincoln Way	Clitheroe	0.46	67	23	Brownfield
B Dugdale and Son, Bellman Mill, Salthill	Clitheroe	0.38	61	26	Brownfield
Land Adj. to Simonstone Lane, Time Technology Park	Simonstone	0.45	50	28	Brownfield

Source: BE Group 2013

6.18 The highest scoring sites are those in high profile locations along the A59 at Samlesbury Aerodrome. Development here can be delivered immediately (in fact it is already complete), on locations adjacent to A59 and only a short distance from the M6 Junction 31.

6.19 Sites at Barrow Brook Business Park score slightly worse than they did in 2008. In some cases, this reflects the fact that unimplemented planning permissions, current in 2008, have now lapsed. However, sites at Samlesbury and Barrow Brook Business Park score equally well on market-led criteria. Land Adj. to Simonstone Lane, Time Technology Park, Simonstone is the worst scoring overall. This reflects the fact that the previous planning permission has now lapsed and development is unlikely in the short or medium term. Land at Salthill Industrial Estate, Clitheroe has the lowest market-led score.

6.20 The site grading provides a reference against which decisions may be taken as to whether some sites might be recommended for deletion from the land supply, because they are unsuited to market needs.

Potential Site Losses

6.21 There is a headline land supply figure of 12 sites – 20.00 ha. However, the 4.32 ha Papillion Site (2), Barrow Brook Business Park, Barrow now has outline permission for 104 dwellings (won at appeal). Although a reserved matters permission is still required, it must be assumed that this land will be lost to housing in the short term.

6.22 The owners of the 3.33 ha Land North of Barrow Brook Business Village site may also have aspirations for housing. However, at the time of writing they are pursuing an employment-led mixed use scheme that would see the majority of the site developed for B1/B2/B8 uses.

6.23 As a further complication, two neighbouring landowners appear to be pursuing rival schemes, which include each other's landholdings, on land north of the existing Barrow Brook Business Park. The affected sites are Land North of Barrow Brook Business Village (which fronts the A59 and is owned by Admiral Taverns) and Land off Hey Road, Barrow Brook Business Village (which is to the rear of Land North of Barrow Brook Business Village and is owned by Newclose Properties and Athertons). From initial discussions with owners it is not clear how, and by whom, this land will ultimately be brought forward. However, both parties continue to pursue schemes which are employment led.

6.24 The owner of the Hindle and Schofield Site, Barrow Brook Business Park has also considered alternative (residential) uses on that land. Indeed the owner argues that some element of higher value uses will be necessary to make any development financially viable. However, at the time of writing they remain committed to delivering an employment led scheme and are continuing to market the site for B1(a) office uses.

6.25 Therefore, in Table 33 scenarios are presented for Ribble Valley's land resource, considering the total supply initially and then adjusting it according to the various assumptions made above.

Table 33 – Ribble Valley Land Supply Scenarios

Scenario	Cumulative Total Land Supply, ha	Comments
Baseline	20.00	Allocated and existing consented employment sites.
Baseline less land subject	15.68	Papillion Site (2), Barrow Brook

Scenario	Cumulative Total Land Supply, ha	Comments
of alternative planning permissions		Business Park, Barrow - (4.32 ha) An outline application for 104 dwellings on the site was allowed at appeal. Sale of the land to a housebuilder is underway.

Source: RVBC/BE Group 2013

6.26 As Table 34 shows, in a best case scenario Ribble Valley has 20.00 ha of employment land and in a worst case only 15.68 ha, at the base date of 31st March 2012.

Employment Areas

6.27 In this sub-section an assessment of Ribble Valley's main employment areas is made in order to provide guidance as to their continued viability. In Table 34, they are grouped into BE Group's categories to better reflect their ranking one against the other. They are graded in the context of the study area, not at a sub-regional level. It should be noted that an employment area, because of its functions may be included in more than one category of site.

Table 34 – Site Hierarchy

Type	Typical Characteristics	Employment Areas/Sites
Flagships	Sites of scale, location and setting capable of being broad business park developments competing for investment in the regional/sub regional marketplace. These are prime sites for marketing to a cross-section of users – including new inward investments into the Borough. They can also meet the needs of image-conscious, aspirational companies already in the area. They may be B1, B2 or B8 in nature.	Barrow Brook Business Park, Barrow Samlesbury Enterprise Zone
Narrow Band Sites	Key developments where the sites, their locations and environment are promoted for a narrow range of uses. It may be that only a part of a larger site is allocated to this activity. In other cases it may be prudent to dedicate the whole site to this narrow band use. Often they are high technology/key growth sector related.	Samlesbury Enterprise Zone
Key Employment Sites	Sites with an influence over the whole of the study area, geared to serving the needs of indigenous industry. They are likely to be of a size to create presence and able to accommodate a range of uses, but more suited to B2 and B8	Link 59 Business Park, Clitheroe Salthill Industrial Estate, Clitheroe Shay Lane Industrial Estate, Longridge

Type	Typical Characteristics	Employment Areas/Sites
	activity.	Longridge Time Technology Park, Simonstone
Key Local Sites	Sites that offer employment opportunities within specific local areas. In most instances their role will be to meet the expansion needs of indigenous companies or to accommodate local start-ups. They tend to focus on use classes B1c, B2 and B8.	Bee Mill, Ribchester De Lacy Business Centre, Clitheroe Fern Court Business Centre, Clitheroe Pendle Trading Estate, Chatburn Primrose Studios, Clitheroe The Sidings, Whalley
Key Rural Sites	Sites that offer employment opportunities within rural areas. In most instances their role will be to meet the expansion needs of rural businesses or to accommodate rural start-ups.	Asturian House, Ribchester Fairfield Business Park, Clayton-le-Dale Gisburn Business Park Manor Court, Salesbury Hall, Ribchester Mill Lane Industrial Estate, Gisburn Poors'land Barn, Slaidburn Brockhall Business Centre, Brockhall Village Root Hill Estate Yard, Dunsop Bridge Whalley Industrial Park, Barrow

Source: BE Group 2013

Summary

6.28 Updating of the Borough Council's recorded employment land availability schedule, confirms that as at 31st March 2012 there were 12 sites totalling 20.00 ha. This represents unimplemented planning permissions and other vacant land in the Borough's employment areas. After adjustment to reflect a worst case scenario this land supply could reduce to 15.68 ha. This is an increase on 2008, when only 9.78 ha was ultimately deemed available.

6.29 The land supply is dominated by provision in at Barrow Brook Business Park, close to the A59 and Clitheroe. Supply elsewhere is limited as many existing sites are held for the expansion of existing large firms. There is no supply in Longridge (the 1.78 ha Chapel Hill site, allocated in the Local Plan, was judged unviable in the 2008 study) or Whalley. There are also no rural options, particularly in the north of the Borough.

6.30 The availability of the existing supply is not a particular issue, as most could be brought forward in the short or medium term (0-3 years). The supply could also meet the needs of both office and industrial occupiers, or provide for a mix of the two uses. However, in most cases land is being held for expansion or planned development. Only at Barrow Brook Business Park is there land readily available for purchase by an incoming business, investor or developer.

6.31 Site scoring shows that Ribble Valley does have a range of high quality employment sites. Indeed, only three sites score less than 70 percent and only one (Land Adj. to Simonstone Lane, Time Technology Park) scores so badly that questions are raised about its viability.

7.0 STAKEHOLDER CONSULTATIONS

Introduction

7.1 Here commentary is provided about Ribble Valley as a whole. This comprises comment from the public sector and other stakeholders – primarily public sector agencies, major businesses and business forums (as suggested by the Council). It should be noted that each organisation's comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture. This has been done to widen the consultation process and to complement the company survey

7.2 This section also considers the property market in the local authority areas adjoining or adjacent to Ribble Valley. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on the Borough's land and property market.

BAE Systems/Lancashire Local Enterprise Partnership (LEP)/Lancashire County Council (LCC)

7.3 These three organisations were consulted jointly in order to review the Samlesbury Enterprise Zone proposal in the context of Ribble Valley. The Enterprise Zone comprises 72 ha, almost a quarter of BAE Systems' 300 ha landholding at Samlesbury Aerodrome. The first phase of 16 ha is now subject to a Local Development Order and could deliver 60,000 sqm of floorspace. In all, 20 ha of the Enterprise Zone is in Ribble Valley.

7.4 A 'commercial masterplan' is being prepared which addresses site infrastructure, phasing, physical constraints, the location of existing services, the BAE secured site boundaries and a separate non-secure access to the site, strategic development principles and off site infrastructure upgrading.

7.5 Samlesbury Aerodrome lacks the constraints of its sister facility Warton, which include an active runway and adjacent housing. Therefore, whilst development at Warton will be limited to office, research and development and light manufacturing uses, Samlesbury will host large scale heavy manufacturing.

7.6 The rules of the Enterprise Zone mean that all new businesses attracted to Samlesbury must be inward investors into Lancashire. Marketing the site and attracting such inward investment is the responsibility of the Lancashire LEP and

LCC. The LEP confirmed that four (confidential) organisations are presently considering investments at Samlesbury. All are aiming to be operational by 2015.

7.7 Between them, the Samlesbury and Warton Enterprise Zones will generate 5,000-6,000 indirect jobs. However, in Pennine Lancashire the LEP expects that most of this benefit will be felt in the M65 Corridor, with few additional jobs generated in Ribble Valley. The Enterprise Zone is not seen as an individual ‘centre of gravity’, rather it is one part of wider picture embracing the Preston (and South Ribble) ‘City Deal’ area and developments in Burnley.

7.8 Enterprise Zone proposals may include a regional training centre facility. BAE Systems is exploring options for the delivery of this with other industry sectors.

7.9 The remaining 228 ha of Samlesbury Aerodrome will be retained by BAE Systems for their own use. BAE Systems has invested significantly in the Samlesbury site since 2006, doubling the amount of manufacturing floorspace. There are now around 4,000 employed on the site, with recent job losses offset by the transfer of some operations from Brough and Warton. Past research, undertaken for BAE Systems by Oxford Economics, established GVA per employee of £76,000/year and a 1:18 job ratio in terms of indirect employment.

7.10 All three organisations consider that there would be value in understanding the existing supply chain providers of BAE Systems, within Ribble Valley. The existing Aerospace Alliance as a membership subscription organisation does not include them all. Also some businesses may be in multi-sector supply chains, which are not eligible to join the Aerospace Alliance.

Neighbouring Areas

7.11 Through changes to the Planning and Compulsory Purchase Act 2004, introduced through the Localism Act 2011, and the direction of the National Planning Policy Framework, a local authority has a duty to cooperate with other local planning authorities relating to development plan document preparation and evidence base collation. Para 160, of the NPPF states local planning authorities should have a clear understanding of business needs within their local economic markets, by working with county and neighbouring authorities to prepare and maintain a robust evidence base about business needs and likely market changes.

7.12 Ribble Valley is surrounded by a number of local authority areas. To the north and east is Craven, part of North Yorkshire. To the north west is Lancaster (although the City of Lancaster, and other key settlements are some distance away). To the west are Wyre, Preston and South Ribble. The bulk of the Samlesbury Aerodrome facility is located in South Ribble Borough. To the south and south east are the other districts of Pennine Lancashire. Blackburn with Darwen, Burnley, Hyndburn and Pendle all share a boundary with Ribble Valley.

Blackburn with Darwen

7.13 Blackburn with Darwen adopted its Core Strategy in 2011. This makes provision for up to 105.5 ha additional employment land between 2011 and 2026. The precise figure will be set in the emerging Site Allocations and Development Management Policies DPD (to be completed in early 2014).

7.14 Land provision will include ‘prestige’ sites around Junctions 5 and 6 of the M65. Prestige sites currently exist at the Evolution Park site adjacent to Royal Blackburn Hospital, and on the Lantern Park site at Whitebirk. Further development at the Whitebirk Strategic Regional Site will be brought forward in partnership with neighbouring Hyndburn Borough.

7.15 Blackburn and Darwen are some distance from Samlesbury Aerodrome and, at present, there are few economic linkages between Blackburn with Darwen and the BAE facility. However, Blackburn with Darwen still consider the Enterprise Zone to be an important future source of higher value employment to people living in Blackburn with Darwen.

Burnley

7.16 Burnley Borough Council is in the process of jointly developing Core Strategy, Site Allocations and Development Control DPDs. All three will be taken to the Issues and Options Stage by the end of the 2013. Burnley’s Employment Land Review is also presently being refreshed. If this revised employment land study does show a supply shortfall, then future employment land allocations will be focused at Burnley’s strategic employment sites, Burnley Bridge; the former Michelin Site, and Burnley Knowledge Park.

7.17 The 18.21 ha Burnley Bridge site is located off Junction 9, M65. Developers, Eshton, propose to deliver 23,226 sqm of B1, B2, B8 accommodation over the next few years. Infrastructure provision is underway.

7.18 Within Burnley town the former Michelin tyre warehouse has recently undergone a £3 million refurbishment. It is now occupied by aircraft components manufacturer Aircelle. The site will be promoted as an *“advanced manufacturing/engineering park attractive to the higher value added manufacturing and engineering business sectors.”* It is hoped that further aerospace companies will be attracted to the location, particularly those who are part of the Aircelle supply chain.

7.19 The Borough Council intends that this development will operate successfully alongside the similar aerospace facility at Samlesbury Aerodrome (i.e. that BAE Systems supply chain firms will go to Samlesbury while Aircelle supply chain firms go to Burnley). However, some competition between the two schemes will be inevitable.

7.20 The 2.2 ha Knowledge Park will provide facilities for knowledge based businesses next to the Burnley UCLan Campus. Developed by a partnership of Burnley Borough Council, UCLan, Burnley College and the Homes and Communities Agency, the site has outline planning permission for 12,077 sqm of B1 development. It is envisaged that many occupiers will be spin-offs and start-ups from UCLan.

7.21 In terms of existing employment areas, Shuttleworth Mead Business Park is close to Time Technology Park, Simonstone. It delivers high quality business premises and is readily accessible to the M65. It covers 28 ha and accommodates approximately 60,000 sqm of industrial and office space. It is fully built out now and there is no scope for further expansion of the site.

Craven

7.22 Craven District Council is in the process of preparing a Local Plan which will combine general policies and site allocations. Informal consultation on the housing and employment elements of this plan will be undertaken in June 2013, with formal consultation likely in early 2014.

7.23 The District Council’s 2008 Employment Land Study (which was never fully completed) identified the need for a further 52-61 ha of employment land between 2006 and 2021. Around two thirds of this, 37 ha, should be allocated immediately to meet needs to 2016. A further 19 ha should be identified for occupation between 2016 and 2021.

7.24 Most existing employment allocations (as provided for in the 1999 Local Plan) have now been built out. Future land allocations will be focused around the South Skipton Employment Zone. This is a 23.5 ha site (14ha of which is developable, while 9 ha lies within a floodplain) that will extend an existing industrial estate. The site has no real linkages to Ribble Valley, or the rest of Lancashire.

7.25 Demand for employment land and premises is focused in the south of the District, around Skipton. This area has strong links with West Yorkshire and (in terms of commuting) the Leeds/Bradford City Regions. Pendle also sits within the Skipton travel to work area, with significant commuting along the A56/A65. Although the A59 provides good linkages to Clitheroe there is little commuting between Craven and Ribble Valley. The only exception is for retail trade, Ribble Valley Borough is within Skipton’s catchment area.

7.26 The only employment scheme that may have any relevance to Ribble Valley is Broughton Hall. This is a high quality office scheme located off the A59, half way between Skipton and the boundary with Ribble Valley.

7.27 In the north west of Craven, the villages of Bentham and Ingleton have employment/commuter links with Lancaster, while Settle is predominantly self contained.

Hyndburn

7.28 The Hyndburn Core Strategy was adopted in 2012. Reflecting the findings of the 2008 Employment Land Study, this strategy seeks to allocate 58 ha of additional employment land for the period 2011-2026. Major allocations will include a 35 ha Strategic Regional Employment Site at Whitebirk, Junction 6 M65. This will be brought forward over the next five years. Employment development is also proposed, as part of a mixed-use scheme, at Huncoat Colliery.

7.29 Closer to the boundary with Ribble Valley, Altham Business Park is now fully developed and is performing well. The Core Strategy allows a small greenfield extension to the south of the existing business park.

7.30 Hyndburn has few existing businesses in the aerospace sector and officers do not feel that Hyndburn Borough will derive any particular benefit from the Samlesbury Enterprise Zone.

Lancaster

7.31 Lancaster adopted its Core Strategy in 2008. It was the first to be adopted in the North West. This sets a target to deliver 24 ha of additional employment land by 2021. New employment development will be focused on the main urban locations of Lancaster, Morecambe, Heysham and Carnforth. No significant allocations are proposed in the rural east of the District, which borders Ribble Valley.

7.32 The largest employment site in the District is the 9.7 ha Lancaster Science Park, south of Lancaster City. Development here will be driven by knowledge-based industries originating from outside the District or from the neighbouring Lancaster University. The highly specialised nature and location of this proposal makes it unsuitable for meeting general employment land needs. Other significant development is expected to focus around Heysham, including the expansion of Heysham Port and the (possible) delivery of a third nuclear reactor.

7.33 In the east of the District, close to Ribble Valley, existing employment areas are limited to two small schemes at Cowen Bridge and Hornby. There are no plans for further development at either location.

Pendle

7.34 The 2008 Employment Land Study noted the need for 54 ha of employment land between 2005 and 2026. Taking account of undeveloped employment land, potential sites, completions and planning consents there is an outstanding requirement for 7 ha of land, to be allocated in the emerging Local Plan. Pendle Borough Council is proposing to update the Employment Land Study over 2013, before the Borough's emerging Core Strategy begins its Examination in Public.

7.35 Pendle's allocated employment sites and existing employment areas are focused along the M65 Corridor and at Barnoldswick. None are close to the boundary with Ribble Valley. Most out-commuting from Pendle is to Burnley or West Yorkshire, while there are few travel to work journeys to, or from, the main settlements of Ribble Valley.

7.36 There is a small cluster of aviation based businesses in Barnoldswick, who may benefit from linkages with the emerging Samlesbury Enterprise Zone. However, the distance between Pendle District and Samlesbury Aerodrome means that any economic benefits which Pendle derives from the Enterprise Zone will be limited.

Preston

7.37 In 2010, Preston had an employment land supply of 107 ha, and required an additional 6 ha to meet targets to 2026. By this measure, Preston requires 113 ha of employment land to meet its needs to 2026. However, the City Council also assumes it will lose around 5.5 ha of employment land to non-employment uses over this period, meaning that 118.5 ha will ultimately be required (107 ha on existing sites, 11.5 ha on new allocations).

7.38 Preston's large existing land supply and comparatively modest future requirements mean that the City is self sufficient for employment land, with no need to look to surrounding local authority areas for support. The City's larger strategic sites are focused around Junction 31(a) M6, and include Preston East (34.89 ha) and Red Scar (21.31 ha). These are located in relatively close proximity to Longridge.

7.39 Proposed new allocations will also be focused around Junction 31(a) and are likely to include The Junction 31(a) Employment Site (up to 25.50 ha) and Roman Road Farm (up to 21.94 ha). These strategic sites will meet needs for industrial and warehousing land, while office requirements will (where possible) be accommodated in the City Centre where there are plans to create a new central business district.

7.40 The availability of land around Junction 31(a) means that there is pressure to release some of the older employment sites for housing, particularly those in city centre locations. Preston City Council (along with other Central Lancashire authorities) has now adopted a joint Supplementary Planning Document which sets out the criteria by which marginal employment sites can be released for other uses.

7.41 In terms of linkages with Ribble Valley, Central Lancashire Core Strategy Policy One: 'Locating Growth' identifies Longridge as a 'Key Service Centre'. The policy notes that *"land within Central Lancashire may be required to support the development of this Key Service Centre in Ribble Valley."*

7.42 The emerging Site Allocations and Development Management Policies DPD proposes the 19 ha 'Land off Whittingham Road' site, Longridge (Site HS1.26) for housing, with a potential mixed-use element that could include B1, B2, B8 employment. Developers Gladman are currently seeking outline planning permission to develop 9.19 ha in the south of this site for a mix of uses, including 515 sqm of B1(a) offices, housing and a water pumping station. A previous application, by Gladman, for a similar scheme was refused at appeal in 2012. ‘Cumulative traffic impacts’ on local roads was the cited reason for that refusal. City Council planners have not yet determined if this new proposal addresses those previous concerns.

7.43 Preston City Council argues that the City will benefit from Enterprise Zone proposals at Samlesbury Aerodrome. They envisage that employment areas in Preston will be able to accommodate aerospace supply chain companies who wish to locate close to Samlesbury, but who may not be eligible to occupy the Enterprise Zone itself. However, Council officers feel that the net economic benefit to Preston will be small compared to the benefits for South Ribble and Ribble Valley, particularly as the City does not have an existing cluster of aerospace businesses to build upon.

South Ribble

7.44 In 2010, South Ribble had an employment land supply of 159 ha, and required an additional 27 ha to meet targets derived from the RSS, to 2026. This additional need accounts for half of the total requirement for Central Lancashire (54 ha), to 2026, as set out in the Central Lancashire Core Strategy, Employment Land Requirements Background Topic Paper (2010) and the South Ribble Site Allocations and Development Management Policies, Development Plan Document (2011).

7.45 By this measure, South Ribble requires 186 ha of employment land to meet its needs to 2026. However, the Borough Council also assumes it will lose around 17.5 ha of employment land to non-employment uses over this period, meaning that 203.5 ha will ultimately be required (159 ha on existing sites, 44.4 ha on new allocations).

7.46 South Ribble’s large employment land supply includes major strategic sites at Cuerden and Samlesbury. The strategic site at Cuerden lies between Leyland, Lostock Hall and Bamber Bridge, adjacent to the M6/M65 junction. Owned by Lancashire County Council, this 65 ha site is suitable for high technology industrial and business uses. South Ribble Borough Council is presently in negotiation with a number of developers, who have options on this site, to agree a masterplan for the scheme and bring development forward.

7.47 The Samlesbury Enterprise Zone is split between the South Ribble and Ribble Valley local authority areas. The development proposed within the Enterprise Zone is discussed in more detail elsewhere in this study. South Ribble Borough Council (along with Ribble Valley Borough Council) are presently awaiting completion of a masterplan for the EZ.

7.48 Proposals at Samlesbury Aerodrome will generate additional jobs in South Ribble (and Ribble Valley). However, South Ribble Borough Council is unsure what other benefits the Enterprise Zone will have for the rest of the Borough. For example, while some aerospace supply chain companies (who wish to locate close to Samlesbury) may move to the employment areas of the Borough, others may be discouraged by the distance between Samlesbury Aerodrome and South Ribble's existing business parks and industrial estates.

Wyre

7.49 The Wyre Core Strategy Preferred Option (2012) divides the Borough into nine Spatial Areas:

- Central Rural Plain
- Cleveleys
- Fleetwood
- Garstang and Catterall
- Poulton-Le-Fylde and Carleton
- Rural East and Uplands
- Rural West
- Thornton
- Wyre Sands.

7.50 The Core Strategy allocates an employment land supply of 96 ha for the period 2011 to 2028. This supply is focused in the Spatial Areas of Thornton (65 percent), Fleetwood (18 percent), Garstang and Catterall (17 percent) and Poulton-Le-Fylde (1 percent).

7.51 A particular focus for employment land allocations is the Fleetwood-Thornton Strategic Site, a strategically important land corridor between Habour Village, Fleetwood and Stanah Road, Thornton. Overall, 76 ha of employment land will be made available in this area, including around 62 ha at Hillhouse, Thornton. Proposals for this former ICI facility include a specialist industrial park, providing land and properties for companies in the energy, renewables, chemicals and plastics sectors, and a 28 ha trade park. Major energy infrastructure is planned on the site, including a 875 MW combined cycle gas power station, to be completed by 2016.

7.52 Fleetwood is recognised as a focus for office development in the Borough, with mixed-use redevelopment options at Fleetwood Docks. However, much of Wyre's employment land is felt to be constrained by access issues and land in multiple ownerships. There is also a lack of understanding about owner intentions and what is actually deliverable on key sites, including Hillhouse.

7.53 Wyre has recently completed an Employment Land Study (January 2013). This study identified a (gross) land need of 45 ha to 2029. This figure provides opportunities for Wyre to develop its renewables and energy generation industries, alongside growth in established manufacturing sectors.

7.54 As with Lancaster, it is the rural east of Wyre Borough which borders Ribble Valley. Growth in this part of Wyre will be limited to small extensions to existing employment schemes in Catterall and Garstang. These primarily serve local communities and are unlikely to have much influence on the more distant settlements of Ribble Valley.

Town/Parish Councils

7.55 All the Town and Parish Councils in the Borough have been contacted. Only Clitheroe and Longridge Town Councils, together with two Parish Councils - Whalley and Aighton, Bailey & Chaigley, responded with any issues in respect to the economy or the employment land and property market.

7.56 Clitheroe Town Council made three relevant comments in relation to this study:

- *"They are not aware of other suitable employment sites in Clitheroe that are available that have not already been identified. However, they are of the opinion that land which forms part of the Clitheroe Community Hospital site could be used to develop appropriate medical associated services.*
- *They consider that there is a need to attract more employers to encourage diversity of employment.*
- *They recognise the importance of the* [Samlesbury] *Enterprise Zone and would not wish to see development elsewhere in Clitheroe which would have a detrimental effect on the success of the Zone."*

7.57 Longridge Town Council was consulted in a face to face meeting. The ten Town Councillors, present at that meeting, concluded that there was a strong need for further employment provision in Longridge. This is necessary to allow the town to keep its existing employers and attract new business opportunities. It is also important to retain existing employment and not lose sites to housing. Finally, Preston City Council is proposing new residential allocations close to Longridge, while the Ribble Valley Strategic Housing Land Availability Assessment proposes a further 400 homes in the town. These will create additional local employment demand.

7.58 Existing employment sites, including those at Barrow Brook Business Park, are judged to be too remote from Longridge. Indeed any sites east of Chipping and Ribchester are judged to be inaccessible for local residents. Possible growth locations are all on or across, the boundary with Preston, in the west of Longridge. However, the Town Councillors felt that Ribble Valley and Preston Council officers are not working together to address this issue. Certainly, most of Preston's land supply is focused at Junction 31a, M6.

7.59 The following sites/areas were considered for employment use:

- Shay Lane Industrial Estate is full, with no room to grow unless it is over the boundary in Preston
- The former Forrest site is being marketed for small units
- The Towneley Auction site now subject to redevelopment proposals for nine starter industrial units
- College Farm, Lower Road is considered a suitable location
- Land to rear of Sainsburys (around 4 ha), adjacent to the cricket club would be a suitable location. The site could be accessed from Willow Park Lane.

7.60 Agricultural conversions may also generate opportunities, although it is assumed that most such conversions will be for housing.

7.61 Whalley Parish Council argues that as the Calderstones site (previously designated solely for business use, for some 15 years) is developed for housing, there is no demand for employment land within the village. Housing development is also underway on land at nearby Barrow Brook Business Park. The road infrastructure, in and around Whalley, cannot cope with the increased traffic which would result from a development of further business premises. Future development in Ribble Valley should be focused at the Samlesbury Enterprise Zone.

7.62 Aighton, Bailey & Chaigley Parish Council do not see any sites within its parish that could be developed for large employment sites. Indeed any such proposals would be opposed. However, the Parish Council does recognise the need to develop local employment opportunities, wherever possible, in order to encourage innovative entrepreneurship from both within and outside the local community. In this respect the Parish Council considers Local Plan planning policy should be flexible in its approach to change of use requests for properties such as redundant public houses or farm units which, subject to appropriate safeguards, could lead to increased employment provision.

7.63 The Parish Council also highlights increased levels of home working that might lead to requests for workspace associated with residential properties. Again the Council feels a flexible approach be adopted with the balance being in favour of granting permissions providing it is reasonable to do so. A less stringent alternative to blanket Borough-wide policies would be more encouraging to employment development and be more attuned to the rapidly changing nature of employment –particularly in rural areas.

Summary

7.64 The Samlesbury Enterprise Zone comprises 72 ha of the 300 ha BAE Systems site. 20 ha of this is in Ribble Valley, of which 16 ha will be brought forward in the first phase. This will deliver some 60,000 sqm of floorspace, potentially including heavy manufacturing facilities. The Enterprise Zone will provide accommodation for companies, in certain industry sectors, looking to invest into Lancashire. The Lancashire LEP indicates that four organisations are presently considering investments at Samlesbury over the next two years.

7.65 Between them, the Samlesbury and Warton Enterprise Zones will generate 5,000-6,000 indirect jobs. However, it is not clear how may of these additional jobs will be generated in Ribble Valley.

7.66 Blackburn with Darwen, Craven, Hyndburn, Lancaster, Pendle and Wyre have few direct links with Ribble Valley. In Pendle, for example, most commuting is along the

M65 Corridor to neighbouring Burnley or east into Yorkshire. Craven is part of the West Yorkshire economic market, with little commuting west along the A59.

7.67 In Burnley, the former Michelin tyre warehouse has now been refurbished and is occupied by aircraft components manufacturer Aircelle. The site will be promoted as an advanced manufacturing/engineering park, providing accommodation for aerospace companies, particularly those who are part of the Aircelle supply chain. It is hoped that this development will operate successfully alongside the Samlesbury Enterprise Zone (i.e. that BAE Systems supply chain firms will go to Samlesbury while Aircelle supply chain firms go to Burnley). However, some competition between the two schemes is likely.

7.68 Preston's employment land supply is, and will remain, focused around Junction 31a, M6. However, the City is also committed, through the Central Lancashire Core Strategy, to support the development of Longridge as a Key Service Centre. This may include the provision of employment uses in the 19 ha Land off Whittingham Road site, Longridge. Developers Gladman are currently seeking outline planning permission to develop 9.19 ha in the south of this site for a mix of uses, including 515 sqm of offices.

7.69 Neighbouring authorities are supportive of the Enterprise Zone proposals at Samlesbury Aerodrome. However, most do not feel they will derive much economic benefit from this specialist scheme which is (in many cases) distant from their main settlements. Only Burnley and Pendle have existing clusters of aerospace businesses that may be able to develop links with incoming companies of the Enterprise Zone.

7.70 Perhaps surprisingly, South Ribble, home to the bulk of the Samlesbury facility, is also not sure what local benefit will be derived from the Enterprise Zone. Although the scheme will inevitably generate some local employment, Samlesbury Aerodrome is viewed as distant from the key settlements and employment areas of South Ribble. Generally, the Samlesbury Enterprise Zone will be a sub-regional/regional scheme with benefits that are dispersed across Lancashire and the North West. The benefits to individual local authority areas will be limited.

7.71 Although every Parish and Town Council was contacted to seek their views on employment land and premises provision, only four responded. Of these, Clitheroe and Longridge Town Councils identified the need for more local employment premises. Aighton, Bailey & Chaigley Parish Council comment on the importance of Local Plan planning policies being flexible to enable the use of redundant public house and farm units or the use of part of residential properties – in rural areas – to reflect the rapidly changing nature of employment in rural areas.

7.72 Clitheroe Town Council feels that land at the Clitheroe Community Hospital site could be used to develop appropriate medical services facilities. They also recognise the importance of the Samlesbury Enterprise Zone and would not wish to see development elsewhere if it would have a detrimental effect on the success of the Zone.

7.73 Longridge Town Council indicates that there is a strong need for further employment provision in Longridge. Possible development sites (some of which are in Preston) include an extension to Shay Lane Industrial Estate, the former Forrest site, the Towneley Auction site, College Farm, and land to rear of Sainsbury's. Agricultural conversions may also generate opportunities, although it is assumed that most such conversions will be for housing.

8.0 COMPANY SURVEY

Introduction

8.1 A business survey has been carried out to establish evidence of demand for land and property, and substantiate findings in other sections of this study. It also widens the consultation process and provides direct empirical data on the demand for property and land. It is another strand of evidence that will be used to inform the study's conclusions and recommendations.

Methodology

8.2 A questionnaire (included at Appendix 7), with explanatory covering letter and pre-paid envelope, was sent out to 200 companies. The list of companies to be surveyed was compiled from those who responded to the 2008 Employment Land Study questionnaire; from EGi, a specialist commercial property database and augmented with data sourced from Ribble Valley Borough Council.

8.3 In 2011 there were approximately 2,000 relevant businesses operating out of B1, B2 or B8 premises or sites in the study area (according to the Office of National Statistics, VAT & PAYE Enterprises, 2012). The survey therefore represents a ten percent sample.

Response

8.4 The postal/online response achieved was 14.0 percent (compared to 33 percent in 2008). Building on this, follow-up telephone calls were made to elicit better co-operation from businesses. These actions significantly enhanced the numbers of responses, as well as establishing those companies who have either ceased trading or are no longer in the study area.

8.5 Overall 105 questionnaires have been completed, 52.5 percent of the total originally targeted (200). This equates to around 5 percent sample of the study area's relevant business population. The responses reflect the dispersed settlement pattern of the Borough, with no less than eighteen different locations represented. Clitheroe and Longridge are the main employment centres and almost 70 percent of the responses were from companies based in these two towns. Table 35 summarises the responses by location.

Table 35 – Company Survey Responses by Location

Location	Number of Responses
Clitheroe	56
Longridge	14
Whalley	6
Chatburn	5
Barrow	4
Billington	4
Waddington	3
Other	13
Total	**105**

Source: BE Group 2013

Company Size

8.6 The 105 companies taking part in this survey employ 785 people. Of these, 10.3 percent are part-time employees, as shown in Table 36.

Table 36 – Number of Employees

Location	Employment		
	Full Time	Part Time	Total
Clitheroe	448	58	506
Longridge	79	7	86
Whalley	14	2	16
Chatburn	28	3	31
Barrow	9	4	13
Billington	25	1	26
Waddington	31	0	31
Other	70	6	76
Total	**704**	**81**	**785**

Source: BE Group 2013

8.7 Table 37 shows that responses generally follow the national profile of small company employment. 80 percent are micro businesses (1-9 employees), with all but one company employing less than 50. Three companies did not indicate their employment levels.

Table 37 – Company Size

Location	Number of Companies Responding Company Size, Employees							
	0-2	**3-5**	**6-9**	**10-20**	**21-49**	**50+**	**N/K**	**Total**
Clitheroe	20	15	8	7	4	1	1	56
Longridge	4	4	3	2	1	0	0	14
Whalley	3	3	0	0	0	0	0	6
Chatburn	1	2	1	1	0	0	0	5
Barrow	2	1	1	0	0	0	0	4
Billington	2	1	0	1	0	0	0	4
Waddington	0	2	0	0	1	0	0	3
Other	6	2	1	2	0	0	2	13
Total	**38**	**30**	**14**	**13**	**6**	**1**	**3**	**105**

Source: BE Group 2013

Current Premises

8.8 Companies were asked to state the type of property they occupy e.g. offices, industrial, warehouse, etc. Industrial premises dominate. Table 38 shows that 47 percent of the companies replying occupy industrial/warehouse accommodation. One quarter of respondents are in offices, and 17 percent work from home.

Table 38 – Responses by Premises Type Occupied

Location	Industrial	Office	Warehouse	Barn Conversion /Farm	Home	Other	Total
Clitheroe	21	13	6	5	10	1	56
Longridge	8	3	1	0	2	0	14
Whalley	3	3	0	0	0	0	6
Chatburn	3	1	1	0	0	0	5
Barrow	0	1	1	0	2	0	4
Billington	1	3	0	0	0	0	4
Waddington	1	1	0	1	0	0	3
Other	3	2	0	4	4	0	13
Total	**40**	**27**	**9**	**10**	**18**	**1**	**105**

Source: BE Group 2013

8.9 Companies were asked to indicate whether they own or rent their property. Table 39 shows that a slightly higher proportion of companies rent their premises than own them, although this is influenced by the level of responses from Clitheroe based companies. For most of the smaller settlements freehold properties dominate, a pointer to the limited availability of rented premises due to an absence of property investors outside Clitheroe, Longridge and Barrow. It should be noted that 17 percent of the companies are home-based – all of which are owned freehold.

Table 39 –Tenure of Premises Occupied

Location	Freehold	Leasehold	N/A (work from home)	Not Stated	Total
Clitheroe	17	24	10	5	56
Longridge	6	5	2	1	14
Whalley	2	3	0	1	6
Chatburn	1	3	1	0	5
Barrow	0	1	2	1	4
Billington	4	0	0	0	4
Waddington	2	0	0	1	3
Other	5	4	4	0	13
Total	**37**	**40**	**19**	**9**	**105**

Source: BE Group 2013

8.10 Table 40 indicates the sizes of premises occupied by companies. Overall, emphasis is on premises of 500 sqm or less (61 percent). A further 27 percent are either home based or were unable to state the size of their premises. Only seven companies occupy property in excess of 1,000 sqm.

Table 40 – Size of Premises Occupied

Location	Number of Companies Responding Size, sqm								
	0-100	101-200	201-500	501-1000	1001-2000	2001-5000	N/A (work from home)	Not stated	Total
Clitheroe	15	14	6	4	1	4	9	3	56
Longridge	4	4	3	1	0	0	2	0	14
Whalley	2	3	1	0	0	0	0	0	6
Chatburn	0	1	2	1	0	0	1	0	5
Barrow	1	0	1	0	0	0	2	0	4
Billington	2	0	1	0	0	0	0	1	4
Waddington	1	0	0	0	0	0	0	2	3
Other	1	2	0	0	0	2	4	4	13

Location	Number of Companies Responding Size, sqm								
	0-100	101-200	201-500	501-1000	1001-2000	2001-5000	N/A (work from home)	Not stated	Total
Total	**26**	**24**	**14**	**6**	**1**	**6**	**18**	**10**	**105**

Source: BE Group 2013

8.11 Respondents were asked to comment on whether they were satisfied with their present accommodation, and if not to explain why. Over 94 percent are content, with only six companies stating they were unsatisfied or very unsatisfied.

8.12 All but one of the six companies provided explanations. Four companies are in premises they feel are no longer suited to their needs because of the building age, layout, access arrangements and maintenance issues. Two are in Clitheroe, with one each in Chatburn and Longridge. One Clitheroe company commented on town centre parking restrictions being an issue for their premises.

Future Accommodation Requirements

8.13 Companies were asked to indicate whether they are considering moving premises in the next twelve months, or two to three years. Only seven companies indicated that they are intending to relocate; with three of them proposing that this will happen in the next twelve months. Five companies require industrial/warehouse space, with two stating that this should include offices. One company is seeking space that would be delivered by conversion of a redundant agricultural building. Another requires office space. No land requirements have been identified. This compares to nine office requirements; six industrial requirements, and one site, which were identified in the 2008 study.

8.14 The forecasted future space needs by size, tenure, quality and location type are shown in Table 41.

Table 41 – Property Requirements by Location and Type

Location Type	Property Type	Current Size, sqm	Required Size, sqm	Tenure and Quality	Area Preferred
Clitheroe					
Town Centre	Office	0-100	0-100	Leasehold/Budget	Clitheroe/Whalley
Industrial Estate/ Business Park	Warehouse + Office	Unknown	Unknown	No Preference/ Moderate	Clitheroe
Industrial Estate	Industrial	201-500	201-500	No Preference/ Budget	Clitheroe
Industrial Estate/ Business Park	Warehouse	2,001-5,000	2,001-5,000	No Preference/ Moderate	Clitheroe/ M65 Corridor
Barn Conversion	Industrial	0-100	0-100	Freehold/ No Preference	Anywhere rural in Ribble Valley
Chatburn					
Unknown	Warehouse	Unknown	Unknown	No Preference/ No Preference	Unknown
Longridge					
Town Centre	Warehouse	Unknown	Unknown	Freehold/ Budget	Longridge
Total		2,202-5700	2,202-5700		

Source: BE Group 2013

8.15 Analysis of the seven requirements suggests that all involve alternative, rather than additional, premises. The majority do not express a preference in terms of leasehold/freehold tenure. In terms of the preferred location most companies identify Clitheroe, although one that is already based in Longridge wishes to remain there. There is also a very clear preference for industrial property, with only one office requirement identified.

8.16 There is no evidence to confirm the requirements will involve additional floorspace. Where companies have indicated a size band for their future space, these all align to their existing premises and reflect indications that moves would be for alternative rather than additional space.

8.17 The known demand is mostly for properties of below 500 sqm. Two of the three companies who do not define future spatial needs are micro businesses and as such are therefore also likely to be wanting properties of sub-500 sqm.

8.18 One further responding Clitheroe based company commented that they will be expanding within five years, planning to move from 100 sqm to 930 sqm of industrial space. The future location is fluid; it could be within Ribble Valley or elsewhere in Pennine or Central Lancashire.

Property Factors

8.19 Companies expecting to move in the next three years were invited to identify the most important factor(s) to be considered when looking for alternative accommodation. The responses indicate the most important factors are accessibility (for either customers or commercial vehicles); availability of parking; the size and specification of the property. The environmental setting was also mentioned by one company.

Additional Findings

8.20 92 of the 105 companies responding to the survey state that they are occupying the same premises they began their business in. Three of the remaining 13 companies have moved to their current property as a result of relocations into the Ribble Valley from Blackburn or Read. Another has expanded into the Ribble Valley from its Preston base.

8.21 Companies were asked if they had initially been formed in the Ribble Valley, and if so for how long. Around three quarters are indigenous to the Ribble Valley, with two approaching 100 years of operations. Almost one third have been in existence from at least the 1990s. However, 42 percent have only been established in the last ten years, and indeed one fifth have been set up since the onset of the financial crisis in 2007.

8.22 The economic situation in the UK is continuing to impact on companies' growth expectations. Only 30 percent expect to see growth in their business over the next five years, and of these only two companies consider they will experience significant growth. For most the expectation is for maintaining current business levels. However, only five companies comment that they expect to reduce operations and these include two where the current owners are planning for retirement.

Summary

8.23 The company survey secured a 52.5 percent response rate.

8.24 The survey results reflect Ribble Valley's local economy structure. Despite the general economic shift from industrial to service sector activity, the former remains a strong focus for the Borough.

8.25 The survey shows a much lower level of demand, in terms of companies planning to expand to new premises, than was the case at the time of the 2008 Employment Land and Retail Study. This would appear to reflect the general economic situation, with most companies expressing caution about future growth levels.

8.26 The emphasis of demand is to industrial/warehouse space of up to 500 sqm. Where companies have indicated a preference, this is for both leasehold and freehold premises. Industrial estates are the most popular locations. Companies want budget or moderate quality accommodation.

8.27 The findings in Section 4.0 – Property Market General assess the supply of available premises. In Table 42 the available properties are aligned to the identified company requirements as one test of the supply and demand situation.

Table 42 – Ribble Valley Premises Supply and Demand Analysis

Requirement Property Size, sqm	Industrial		Office	
	Available Units	Number of Requirements Identified by Company Survey	Available Units	Number of Requirements Identified by Company Survey
0-100	10	1	34	1
101-200	5	-	8	-
201-500	13	1	5	-
501-1,000	4	-	3	-
1,001-2,000	1	-	1	-
2,001-5,000	3	1	-	-
5,001+	1	-	-	-

Source: BE Group 2013

8.28 Table 42 illustrates that overall Ribble Valley has a reasonable range of industrial premises, in that there is some availability in all size bands. However this supply is weighted towards premises of less than 500 sqm, with few options for companies who may require larger properties.

8.29 Table 42 also shows that the supply of office accommodation is very much geared to micro businesses or start up/small operations. Two thirds of the available properties represent sizes of 100 sqm or less and there is only one larger (1,001 sqm and above) option on the market.

8.30 Table 43 compares the tenure and quality of the available accommodation with the identified requirements. This suggests a shortage of freehold industrial properties in the Borough, against the demand emerging from just the company survey. There appears to be a plentiful supply of office premises, though there are no freehold opportunities. There are few good quality or new premises available. However the company survey findings suggest occupiers' aspirations are only for lesser quality space.

Table 43 – Ribble Valley Premises Supply – Qualitative Analysis

Requirement Property Size, sqm	Industrial		Office	
	Available Units	Number of Requirements Identified by Company Survey	Available Units	Number of Requirements Identified by Company Survey
Freehold (or Either)	4	6	-	-
Leasehold	33	4	51	1
Good Quality/New	7	-	-	-
Moderate	29	2	51	-
Basic/Budget	1	2	-	1

Source: BE Group 2013

8.31 It should be remembered that the company survey is just one strand of evidence, providing an illustration of pent-up demand. It is not the sole answer. It is probable that not all the company requirements identified by the survey returns will come to fruition. Equally there will be other companies who were surveyed that stated that they do not intend to relocate or expand at the moment, but which may well do so over the next three years. It should also be noted that this survey has been undertaken during a period of challenging national and global economic conditions. This is likely to impact on companies' future plans and the timing of these plans.

9.0 GROWTH FORECASTS

Introduction

9.1 This section explains the five alternative models we have applied to the assessment of employment land allocations for the Local Plan period. None provide a definitive answer, but they are influences to be considered. The five models are explained in the following paragraphs and are summarised as follows:

- Historic land take-up forecast
- Policy off – employment based forecast
- Policy off – labour supply forecast
- Policy on – employment based forecast
- Policy on – labour supply forecast.

9.2 Both the 'policy off' and 'policy on' forecasts are based on data commissioned for this study from Oxford Economics. As such they represent up to date forecasts that reflect the impact of the recent recession.

9.3 The 'policy on' forecasts reflect the Enterprise Zone status allocated to part of the BAE Systems site at Samlesbury.

9.4 For the last four models we have commented upon the implications in terms of the volume of land required. Where appropriate the options take into account assumptions regarding the built floorspace associated with developable land areas drawn from the consultancy team's experience and application in other Employment Land Review studies. Job related densities used equate to those identified in the Homes and Communities Agency and OFFPAT (Office of Project and Programme Advice and Training) Employment Densities Guide 2nd Edition, published in 2010.

9.5 This section also considers the land needs of non B-class employment uses included within the NPPF definition of 'economic development',

Model 1: Historic Land Take-Up

9.6 Employment land take-up is recorded by the Borough Council. Table 44 schedules completions since 1998. It combines evidence complied for the 2008 Employment Land and Retail Study with the subsequent Borough Council Annual Monitoring Reports' data on employment land take-up. The 15.83 ha of land developed since 1998 equates to an annual average take-up of 1.13 ha. Total land take-up is categorised between B Use classes (B1 offices; B1 industrial; B2 industry and B8 warehousing) and employment land gain with other use classes.

Table 44 – Ribble Valley Employment Land Take-up 1997/98-2011/12

Year	Amount of Land, ha
1998-2008 [1]	10.72
2008-2009 [2]	1.15
2009-2010 [2]	3.09
2010-2011 [2]	0.40
2011-2012 [2]	0.47
Total	**15.83**
Average Annual Take-up, ha/year (14 years period)	1.13
Average Annual Take-up, ha/year (5 years period)	1.26

Source: Ribble Valley BC/BE Group 2013

NB.1: From 2008 Ribble Valley Employment Land & Retail Study

NB.2: From Ribble Valley BC Annual Monitoring Report

9.7 The historic (long term) take-up rate of 1.13 ha is marginally higher than the 1.07 ha figure reported in the 2008 study. This is somewhat surprising bearing in mind the economic recession during the past five years. It is testimony to the resilience of the Ribble Valley local economy. As a consequence the annual average take-up for the last five years also exceeds, at 1.26 ha, the historic 1.13 ha per annum.

9.8 Application of the long term take-up figure suggests Ribble Valley would need 18.08 ha to cater for an expected annual take-up of 1.13 ha for the next 16 years (to the end of the Local Plan period, 2028). However the Borough should, based on accepted practice for employment land studies, have a buffer of five years supply to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the Plan period. Based on the historic take-up trend this would increase land supply need to 23.73 ha.

9.9 At March 31 2012 the headline supply of available land in the Borough (from Section 6.0) was 20.00 ha, which suggests there is a small surplus of 1.92 ha, based on historic trends – and before allowance for any buffer. As noted in Section 6.0, the supply position has reduced as a consequence of an alternative use planning consent, to create a realistic supply figure of 15.68 ha. This suggests a shortfall in supply of 2.40 ha against the historic trend.

9.10 Notwithstanding the short term trend which has seen an increased annual take-up average during a period of economic recession, it is prudent to apply longer period trends in considering forecasts for the Local Plan period. The average take-up for the last fourteen years has been 1.13 ha. Applying this rate, Ribble Valley would require 18.08 ha to the end of the Local Plan period, plus a five year buffer of 6.65 ha. The resulting total of 24.73 ha suggests the Borough has a shortfall of 4.73 ha compared to the headline supply and 9.05 ha against the realistic supply figure.

Model 2: 'Policy Off' – Employment Based Forecast

9.11 This scenario uses as its base the Oxford Economics Forecasts referred to above. The forecasts project employment change through to 2028 and include annual employment figures for the Borough from 1991.

9.12 The forecasts break down employment to the level of 19 industry sectors, although not all are relevant to this Employment Land review. It should be noted that for this model the forecasts reflect a non-intervention scenario, in that no account is taken of any planned or emerging investment programmes or strategies in the Ribble Valley.

9.13 Oxford Economics' baseline indicates that whilst Ribble Valley's employment was initially impacted by the recent recession, with a fall in numbers in 2007 and 2008, there has since been a sharp recovery. Job numbers in 2012 (34,500) were well above those of 2007 (28,700). The forecasts suggest a year on year growth from 2013, albeit at a low level, right through to the end of the Plan period.

9.14 As a result, over the Plan period total employment is forecast to increase by 1,600 jobs, equivalent to a rise of 4.6 percent from 2012, when the total figure was 34,500. However, this is significantly less than the UK growth figure of 8.1 percent for the same period, and is also below the 6.2 percent increase rate projected for the North West.

9.15 The figures suggest that Ribble Valley is aligned to the general trend of the UK of a decline in manufacturing employment and growth in services. At 2012 manufacturing employment represented over one fifth of the Borough's total, 20.6 percent, almost two and a half times the UK average (8.3 percent) and more than double that for the

North West (9.2 percent). Although manufacturing employment in the Borough is forecast to reduce to 15.8 percent by 2028, it remains a very significant share of the local economy and employment provision due to the presence of BAE Systems site at Samlesbury. This reduced share is still very substantially above the North West (7.0 percent) and UK (6.3 percent) projections for 2028.

9.16 Although services sector employment is forecast to grow in Ribble Valley over the Plan period, the rate of growth is well below that for either the North West or the UK. As Table 45 illustrates for most of the services sectors Ribble Valley's share of employment is less than half the national or regional rates. This is the case for both private and public sector services employment.

Table 45 – Employment Share For Service Sectors, 2028
Ribble Valley, North West, UK

Service Sector	Percentage Share 2028 of Total Employment		
	Ribble Valley	North West	UK
Information & Communications	1.7	2.6	4.1
Financial & Insurance	0.8	3.0	3.2
Professional, Scientific & Technical	4.4	8.7	9.4
Administration & Support	4.7	9.2	9.3
Public Administration	1.9	3.8	3.9
Other Services	2.2	2.9	3.0

Source: Oxford Economics Forecasts 2013

9.17 Reflecting its rural and tourism characteristics the forecasts show Ribble Valley's employment shares for agriculture (2.2 percent) and accommodation and food services (10.5 percent) well above the regional and national averages at the end of the Plan Period. Collectively they represent 12.7 percent of Ribble Valley's total employment, compared to 8.2 percent for the North West, and only 7.9 percent for the UK.

9.18 In terms of future employment land requirements this model is likely to be affected by three key factors:

- The future mix of activities in respect of office, manufacturing and warehousing employment within different sectors. It is not possible to predict the impact of evolving technical change over the Local Plan period, and we have therefore assumed the current split is maintained

- The average space each employee occupiers – the employment density. We have assumed no variation in the density rates through to 2028 and as stated earlier have used those identified in the 2010 published Employment Densities Guide 2nd Edition
- The average development floorspace per hectare for office, manufacturing and warehousing activities. We have applied the uniform amount of 3,900 sqm per ha.

9.19 Table 46 provides a breakdown of the projected sector changes. It should be noted that the figures include non-B use class sectors such as retailing, hotel and catering, to acknowledge their reference as economic activity. Total employment is forecast to increase by 1,600 between 2012 and 2028, despite the decline in manufacturing.

Table 46 – Projected Employment Change by Industry Sector 2012-2028

Industry Sector	**Workforce Change Numbers of Employees**	**Percentage Workforce Change**
Agriculture	(100)	-11.1
Utilities	-	-
Manufacturing	(1,400)	-19.7
Construction	-	-
Transportation & Storage	-	-
Wholesale & Retail	1,400	+15.2
Hotels & Catering	400	+11.8
Information & Communications	100	+20.0
Real Estate	-	-
Finance & Insurance	100	+50.0
Professional, Scientific & Technical Services	300	+18.8
Administrative & Support Services	500	+41.7
Public Administration	(100)	-12.5
Education	100	+2.8
Health & Social Work	100	-
Arts, Entertainment, Research	100	+25.0
Other Services	100	+14.3
TOTAL	**1,600**	

Source: Oxford Economics/BE Group 2013

9.20 In calculating the employment land requirement arising from forecast employment changes, the following assumptions have been used (Table 47):

- The proportion of people in each industry sector that occupy B1, B2 or B8 space conforms to those ratios used in other studies and accepted in comparable locations and are sourced from the South East Regional Planning Conference's 'The Use of Business Space'
- Employment Densities for each B Use Class are those set out in the 2010 Employment Densities Guide 2nd Edition published by HCA and OFFPAT
- The development per hectare of land is uniform across all B Use Class functions – 3,900 sqm per hectare, the accepted industry norm.

Table 47 – Model Assumptions for Industry Sectors – Employment Percentage Occupying B Use Class Floorspace and Floorspace Allocations

Industry Sector	Employees		
	Percentage Occupying B1, B2, B8 Floorspace,	B1,B2,B8 Floorspace per person, sqm	Other Comments
Agriculture	5	12	Managerial, admin
Utilities	5	12	
Manufacturing	100	36-47	Higher density reflects B2; Lower density B1 light industry
Construction	26	12	Managerial, admin
Distribution	48	70	Warehouses, offices-non large scale/high bay facilities
Transport	48	70	Warehouses, offices-non large scale/high bay facilities
Financial & Business	100	12	
Government & Other Services	22	12	Local Government, Public Administration

Source: SERPLAN and Employment Densities Guide 2nd Edition, 2010

9.21 Application of these assumptions suggests the following in terms of future employment land provision:

- From sectors predicted to grow, the need for a further 12.00 ha
- From those sectors where employment is forecast to reduce there will be a reduction in the requirement of between 12.99 and 16.94 ha less land. This range reflects the variance in employment densities between light and general manufacturing.

9.22 The net result of this suggests Ribble Valley would have an excess of between 1.0 and 4.9 ha of employment land by 2028, before taking into account the current baseline supply. The detailed calculation is provided at Appendix 8.

9.23 In reality the employment land provision situation will be reliant upon two issues. Firstly, how far the growth in office employment takes place in a town centre location, at higher densities, rather than in low-density business parks. Secondly, whether the decline in some manufacturing sub-sectors will actually lead to the release of land that could then be regenerated for other employment uses.

9.24 It is probable that these land requirements' calculations represent a false position. Irrespective of changes to employment densities, whilst growth sectors seek to expand by taking additional space, declining sectors may actually not release land in line with the above assumptions. Were this to be the case this model's outcome would change to a position where around three quarters of the current realistic supply would be required to meet the forecast need.

9.25 It is possible the Local Plan period will see further changes in employment densities. For office employment this could be the result of trends towards remote working, hot desking, increased use of ICT and smaller businesses. Densities in manufacturing and distribution may well continue to fall as a result of automation. However, it is impossible to project what the percentage change in densities might be and thus what the impact on future land requirements might be.

Model 3: 'Policy Off' Labour Supply Forecast

9.26 This scenario is based upon Oxford Economics Population Forecasts. The projections indicate a rise in population numbers for the Borough to 64,000 by 2028. This represents a 10.3 percent increase from the 2012 figure of 58,000. Reflecting a trend of an ageing population, the working age population figure would increase by a lesser amount, from 33,000 to 35,000.

9.27 The forecast is based on the assumption that the current resident employment rate of 83 percent will marginally increase to 84 percent by 2028. This suggests a 1,600 increase in the number of residents working by 2028. To calculate what the increase means in terms of impact on employment land need we have converted the effect of the 1,600 growth into an equivalent land area. We have applied the Oxford

Economics' forecasts for the percentage shares of the different industry sectors to the 1,600 figure to establish the number of jobs applicable to each sector. We have also assumed that the relationship between employment densities and land requirements within industry sectors is the same as projected in Model 2 – the employment based analysis. This translates to an increased need of between 3.40 and 4.11 ha. As with Model 2 the range of need reflects high and low densities for manufacturing employment. However the model indicates there would be a significant oversupply of employment land when measured against the current baseline position.

Model 4: 'Policy On' Scenario, Employment Based Forecast

9.28 The 'policy on' scenario is based on the information contained within the Lancashire Advanced Engineering and Manufacturing Enterprise Zone bid application, approved by the Department of Communities and Local Government in August 2011, referenced elsewhere in this report. The scenario reflects the following:

- 701 direct jobs are to be created at the Enterprise Zone by 2015 and 2,461 in total by 2037 (end of Enterprise Zone status)
- 1,204 indirect jobs are to be generated through the supply chain and local services sector by 2015
- Development of 35,000 sqm of B1,B2 and B8 space by 2015 and 6,000 sqm of D1 space for a Regional Skills Academy
- The Enterprise Zone will focus on upper tier high value companies in aerospace, general aviation services, high end automotive, computing systems engineering and autonomous systems, nuclear, advanced flexible materials and renewable energy.

9.29 The 'policy on' scenario identifies a number of differences from the 'policy off' forecasts. These are:

- The overall jobs total forecast will increase by 4,900 over the Local Plan period (compared to 1,600 in the policy off scenario) as a consequence of the Enterprise Zone's introduction
- There will be a increase of 3,000 in the number of residents working, rather than an increase of 1,600 –again as a result of the Enterprise Zone's introduction
- The resident employment rate increases to 86 percent in 2028, compared to 84 percent in the 'policy off' forecast

- Reflecting the nature of Enterprise Zone the manufacturing, transportation, and administrative and support services sectors see enhanced levels of employment growth, compared to the 'policy off' forecast.

9.30 Applying the 'policy on' scenario to the employment based model indicates that growth sectors would generate a further need of between 23.02 and 24.71 ha. Taking account of reduced employment in other sectors would result in a minimal reduction in need to between 22.95 and 24.66 ha. As explained previously, the variance reflects the different employment densities applicable to light and general industry in that there would therefore be a need of 5.5 ha based on the lower floorspace per job ratio, which increases to 7.2 ha at the higher floorspace ratio. This model suggests an additional need of between 20 and 22 ha compared to Model 2 'Policy Off' Employment Based Forecast. This would be substantially accommodated by the Enterprise Zone, which as stated in the Borough's Core Strategy does not form part of the general employment land supply.

Model 5: 'Policy On' Labour Supply Forecast

9.31 For the labour supply model the 'policy on' scenario indicates there would be an increase in working residents of 3,000, over the Local Plan period. Assuming this increase aligns to the percentage share of each industry sector in accordance with the forecast employment by sector, then this suggests a need of between 14.10 and 15.75 ha. However set against the headline supply position of 20.00 ha this suggests that as much as 30 percent of the supply could be considered surplus.

9.32 The detailed calculations for the 'policy on' scenarios are set out in Appendix 8.

Land Needs of Non-B Class Uses

9.33 The NPPF provides a broad definition of 'economic development' which extends beyond B-class employment to include *"public and community uses and main town centre uses (but excluding housing development)."* No further definition of 'public and community uses' or 'main town centre uses' is provided. However, based on BE Group's past experience and earlier definitions provided in the (now revoked) Planning Policy Statement 4, relevant non-B class sectors will include:

- Retail trade (excluding wholesale and motor trade)
- Accommodation and food service activities
- Education

- Human health and social work activities
- Arts, entertainment and recreation.

9.34 All these non-B class employment uses can be accommodated within town centres, while education and human health and social work activities are the main 'community' uses which generate employment (i.e. employment in schools, higher/further education facilities, hospitals and associated medical centres).

9.35 At present, these sectors are estimated to account for around a third of all jobs in Ribble Valley. This is expected to increase slightly to 34.9 percent by 2028, according to Oxford Economics' job forecasts.

9.36 It must be recognised that the job and space requirements associated with these sectors are estimated and planned for in a different way to B class uses. For example, health facilities will have quite specific land needs that are not linked directly to job numbers; education facilities are planned based on forecasts for pupil roll numbers and capacity in existing schools/colleges. Retail or leisure operators will locate in town centres, within mixed-use schemes or in locations of their choice, rather than on specifically allocated sites.

Retail Trade

9.37 The Retail Trade (except of motor vehicles and motorcycles) sector provided 2,100 jobs in Ribble Valley in 2012 (Oxford Economics forecast). This equates to some 6.1 percent of the total number of jobs. Oxford Economics forecast the sector to see growth of 300 jobs by 2028. By the end of the Local Plan period the sector's share of total jobs in the Borough will have risen to 6.6 percent.

9.38 Most new retail floorspace can be expected to be located primarily within or adjoining the Borough's main centres. It is possible, as has already been explained, that some retail warehousing and convenience superstores may seek to locate on existing industrial land because their floorplate and site requirements cannot be accommodated elsewhere. It is difficult to estimate as part of this study how much industrial land might be needed for retail uses (particularly non-food retail) over the Local Plan period. However it is suggested a relatively modest amount of say 1-2 ha, could come under pressure for warehousing/superstore uses, primarily in the Clitheroe area.

Accommodation and Food Service Activities

9.39 The Accommodation and Food Services Activities sector provided 3,400 jobs in Ribble Valley in 2012 (9.9 percent of the total). Growth of some 400 jobs is predicted by 2028. By the end of the Local Plan period the sector's share of total jobs in the Borough will have risen to 10.5 percent.

9.40 The sector covers employment generated by hotel, bed and breakfast self-catering accommodation, as well as bars and restaurants.

9.41 Demand for this sector is generated from both domestic, and to a lesser extent overseas tourism (hotels and restaurants), as well as spend by the Borough's residents (most likely to be restaurants and other catering). Future growth depends on visitor numbers to Ribble Valley and business activity. For example many business parks now include 3 or 4 star hotels as part of their offer of support services for occupiers. As Barrow Business Park continues to grow then provision might be required for such a hotel, linked to the existing roadside services.

9.42 Of the uses included in this sector it is only likely to be hotels (especially if they want co-located bar/restaurant facilities) that will have significant new land needs. Most other bars, restaurants, pubs etc are likely to occupy existing retail properties or rural premises. Consequently it seems appropriate to make some provision for land for new hotel facilities. Based on the typical current site requirements of 3 star budget chain hotels, this would mean in the order of 1 ha.

Education

9.43 This sector incorporates primary and secondary schools, further education colleges as well as commercial nurseries. In 2012 the sector comprised 2,100 jobs in the Borough which Oxford Economics forecast will rise to 2,200 by the end of the Local Plan period.

9.44 The scale and location of new facilities is heavily interrelated with the level of population and housing growth in the Borough. It is likely any new school provision will be accommodated within the gross area of larger housing/settlement developments, such as that proposed at Standen.

Human Health and Social Work Activities

9.45 Included within this sector are hospitals, medical centres, GP and dental surgeries, private or specialist healthcare (e.g. physiotherapy), veterinary practices and residential care homes. Oxford Economics estimate that in 2012, 3,600 jobs were provided in this sector within Ribble Valley. At just over 10 percent of the total jobs in the Borough, the sector is the third largest source of employment behind manufacturing and wholesale trade. Oxford Economics' jobs forecasts expect to see the sector experience only a modest rise of 100 jobs between 2012 and 2028.

9.46 Despite a slowdown in Government spending on health, the increasing numbers and longevity of the elderly population and possible growth in demand for private health care may lead to further provision of residential care homes. Nevertheless in general employment sites are inappropriate locations for care homes, due to amenity considerations. However, some smaller rural sites might be of interest for such use.

9.47 There is evidence elsewhere of veterinary practices, GP and private or specialist healthcare operations being accommodated on employment sites, or through a change of use of existing office buildings. The informal health sector, with its many micro-business practitioners, tends to operate from dwellings, converted retail premises or community buildings. Whilst they can contribute to local job growth, they do not require significant amounts of floorspace.

9.48 Consequently it is considered the growth in employment from this sector will be limited in terms of requirements for new space (more probably existing buildings will be occupied through changes of use) and there will be very little requirement for additional land.

Arts Entertainment and Leisure

9.49 This sector includes amongst other activities forms of commercial leisure such as cinemas, theatres, bowling alleys, bingo halls and nightclubs. Overall the relative proximity of major leisure facilities in surrounding Districts (particularly Preston and Blackburn with Darwen) constrains the catchment area and potential for sizeable growth in commercial leisure facilities in Ribble Valley. There could be some expansion of provision in bars and nightclubs, but these activities would mainly be located within town centres, using former retail properties or forming part of new mixed-use development. They would not require additional land of any significant scale.

Summary

9.50 Five alternative forecast options have been produced and considered for the Plan period. The calculations for each are summarised in Table 48, which illustrates the net land need for each model when the existing headline baseline supply of 20.00 ha is taken into account. The calculations show varied outcomes, with the land take-up trend models and the two 'Policy On' scenarios suggesting a range of shortfalls. The 'Policy Off' employment and labour supply models indicate a surplus, ranging from a low of 10.06 ha to a high of 24.66 ha.

Table 48 – Land Forecast Models – Summary

Model	Land Stock 2012[1], ha	Land Need 2012-2028, ha	Buffer (5 years take-up rate), ha	Surplus (shortfall), ha	Assumptions
Long Term Land Take-up	20.00	18.08	5.65	(3.73)	Based on historic (14 years) take-up of 1.13 ha/pa
Short Term Land Take-up	20.00	20.16	6.30	(6.46)	Based on last five years take up of 1.26 ha/pa
Policy 'Off' Employment Based	20.00	-0.99/-4.94	5.65	19.29/24.66	Based on projected growth/reduction of employment in industry sectors and inclusion of historic take up buffer
Policy 'Off' Labour Supply	20.00	3.40/4.11	5.65	10.24/10.95	Based on population projections and industry sector changes (growth/reduction) and impact on floorspace (and thus land) need, and inclusion of historic take up buffer.
Policy 'On' (linked to Enterprise Zone) Employment Based	20.00	22.95/24.64	5.65	(8.60/10.29)	As per employment based policy of model but reflects Enterprise Zone forecasts
Policy 'On' (linked to Enterprise Zone) Labour Supply	20.00	14.10/15.75	5.65	0.25(1.40)	As per labour supply policy off model but reflects Enterprise Zone forecasts

Source: BE Group 2013

[1] *N.B. Headline supply at 31 March 2012*

9.51 The employment based model suggests that the Borough might eliminate all of the current baseline available supply, even after allowing for a five years buffer. The labour supply model suggests around 10 ha of the baseline land supply would be surplus, though this reduces to between 5 and 6 ha when assessed against the realistic supply figure of 15.68 ha.

9.52 The ‘policy off’ forecasts indicate the Borough needs significantly less employment land than predicted by either the long or short term take-up rates. Indeed both ‘policy off’ models suggest that at best only half of the currently allocated or consented but undeveloped employment land in Ribble Valley is required.

9.53 Common sense suggests this argument is flawed. The two models cannot account for the vagaries of the property market. They assume the property market is perfect and not rife with market failures as is reality. For example, neither model makes allowances for companies modernising or relocating into different sized properties; that land is not used totally efficiently; that some brownfield land may remain undeveloped due to the costs of remediation; that some companies occupy more space than they need or will hold land long term for their own possible future expansion; or that there needs to be a range of sites and locations to provide companies with choice.

9.54 The ‘policy on’ forecast scenarios generate outcomes that suggest Ribble Valley would have a shortfall of land – although somewhat lesser in scale for the labour supply based model compared to the employment based scenario. The latter could see a shortfall equivalent to as much as half the current baseline supply. However, it should be noted the Enterprise Zone land allocation is excluded from the Employment Land supply, and it must be anticipated that the demand generated would be accommodated within the Enterprise Zone.

9.55 In other local authority areas where similar studies have been completed, the use of employment and labour supply models has also generated comparable results. In all instances where BE Group has been involved these models have been discounted in favour of long term land take-up trends. The latter have been considered a better yardstick for future land supply requirements and have been accepted as such by local authorities and planning inspectors examining these studies.

9.56 Furthermore the figures in Table 48 relate to the 2012 headline land supply. They take no account of the potential loss to this supply, identified in Section 6.0, which generates a realistic supply figure reduced to 15.68 ha.

9.57 The non B Uses could provide some 1,000 more jobs in Ribble Valley by 2028, a 7.9 percent increase on the 2012 employment level.

9.58 In terms of future land needs for these sectors the analyses suggest land requirements for more are likely to be at best modest (see Table 49). This is largely because many will use land already held by the relevant provider, or because the use can be incorporated within mixed-use developments, often town centre based.

Table 49 – Non-B Class Sectors Job Growth and Land Requirements

Sector	Employment Nos 2012	Employment Forecast Growth (Decline) to 2028	Additional Land Requirement	Implications for B Class Land
Retail Trade	2,100	+300	1-2 ha	Potential, for modest employment land losses to warehousing/superstore uses, primarily in the Clitheroe area.
Accommodation & Food Services	3,400	+400	1 ha (for hotel)	Potentially a hotel could occupy Business Park location
Education	2,100	+100	Possible	None. New facilities likely to be associated with housing developments
Health & Social Work	3,600	+100	Likely to be limited in scale	Potential for some activities e.g. vets practice, informal health activities to locate on B Class sites or occupy existing office / industrial buildings, based on trend evidence elsewhere. Residential care homes might pursue stand alone industrial sites where location is considered appropriate from market perspective
Arts, Entertainment & Leisure	400	+100	Likely to be limited in scale	None. Activities associated mainly with town centres uses and will occupy either retail properties or be part of new mixed-use schemes

Source: Oxford Economics / BE Group 2013

10.0 CONCLUSIONS

10.1 This study has included a wide-ranging look at the factors affecting the Ribble Valley's economy, with particular reference to those that are likely to affect the future need for land and property within the Borough. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in Section 11.0.

Planning Policy Position

10.2 The National Planning Policy Framework (NPPF) places a strong emphasis on delivering sustainable development through the planning system. This includes reviewing employment land allocations to ensure supply meets identified objectively assessed needs; proactively supporting sustainable economic development to deliver business and industrial units, and encouraging the effective use of land by reusing brownfield land.

10.3 The Government's planning policy approach sees responsibility resting with Ribble Valley Borough Council to set employment land requirement figures for the Local Plan. Land targets will be tested through the Local Plan process and the Council therefore needs to collect and use reliable information to justify employment land supply policies. This report provides this information.

10.4 The economic role that the planning system must perform incorporates contributing to the building of a strong, responsive and competitive economy, by ensuring sufficient land of the right type is available in the right locations, at the right time, to support growth and innovation.

10.5 The NPPF states that 'significant weight' should be placed on the need to support economic growth through the planning system. To help achieve this growth, Local Plans should set criteria, or identify strategic sites, for local and inward investment and to meet anticipated needs over the Local Plan period. For Ribble Valley this means to 2028.

10.6 In addition, during the course of this study the Secretary of State for Communities and Local Government has announced the intention to increase the scope of permitted development rights in order to facilitate growth. These will allow change of use from B1 (a) offices to C3 residential. The policy change will be reviewed after three years to determine whether the policy should be extended indefinitely.

10.7 The NPPF also highlights that allocated employment sites for which there is no reasonable prospect of development should not be protected in the long term. Proposals for alternative uses on such sites should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.

10.8 The NPPF states that local planning authorities should apply sequential testing to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. This sequential testing applies to office development – but not to small scale rural offices or other small scale rural development. As NPPF stays silent on the definition of "*small scale rural offices"* and no established precedent is known, it is considered Ribble Valley should have regard to this through its planning policies. This will avoid any doubt as to what is meant. It is believed the intent of NPPF is to facilitate and encourage the economic re-use of former agricultural properties, which by and large are small scale in size.

10.9 It is suggested that Ribble Valley define small scale rural offices as individual premises of no more than 200 sqm in size created either by conversion or new build and a maximum of 1,000 sqm of development on a single site. This therefore does not preclude the provision of more than one property at a single location but it would ensure the avoidance of large scale office development by stealth i.e. an attempt to circumvent the sequential test requirement for schemes not in town centres.

Economic Profile

10.10 The socio-economic profile of Ribble Valley reveals over 66.9 percent of the working age population to be in employment, which is above both the North West (59.6 percent) and national (62.1 percent) averages. Unemployment, at 2.1 percent is less than half the national and regional figures of 4.4 percent and 4.7 percent respectively. Ribble Valley has an economically active and skilled workforce. High proportions work in professional occupations, compared to the rest of Lancashire and the North West. It is an affluent location, being the least deprived local authority area in the county. Average earnings of people both living and working in Ribble Valley are also higher that elsewhere in Lancashire.

10.11 2011 Census data regarding contemporary commuting patterns is still awaited. Historically the Borough has been a net exporter of labour (the 2001 Census revealed a net outflow of over 4,600 people), with the main destinations being Blackburn, Burnley, Hyndburn and Preston. The Borough also has a role as a supplier of labour to employment centres in Greater Manchester, with these accounting for almost two thirds of the net outflow.

10.12 The manufacturing sector continues to employ a significant proportion (13.1 percent) of people in Ribble Valley – a reflection of the presence of BAE Systems. As a consequence the percentage share is 50 percent higher than the national average and more than a quarter higher that the North West average. It is also marginally above the county figure of 12.2 percent. However, private sector services activities, ICT, finance and insurance, administrative and support service activities represent a much lower share of employment (7.6 percent) than either the county, regional or national picture. The national average is 13.4 percent.

10.13 The number of VAT registered businesses (3,260 in 2011) is the product of continuing growth during the recession. There has been a 20 percent increase in the number of businesses in the borough since the 2007 figure of 2,720 used in the 2008 Employment Land and Retail Study. Almost 89 percent of companies are micro-businesses (less than 10 employees). A further 9.1 percent employ up to 49 people (small businesses). Homeworking accounts for 14.6 percent of the working age population in employment in 2011. This is a higher level than the county, regional and national averages. It is a characteristic of the rural north east areas of the Borough.

10.14 The current structure of premises in Ribble Valley is strongly industrial. Across the Borough the number of industrial and warehousing units is more than double the number of offices. Spatially the bulk of the business space is located in the south of the Borough (close to the Burnley and Hyndburn borders) and in north and east Clitheroe.

Property Market Assessment

10.15 The A59 corridor through the Borough, particularly around north Clitheroe and Barrow, dominates the existing supply of premises. To a lesser extent Longridge and Simonstone represent other concentrations of supply. The latter location connects to the M65 corridor. The A59 is seen as an axis between the M6 at Preston and

Yorkshire, and is a focus of demand because of the proximity to the Ribble Valley's main population centre.

10.16 Office market demand is very much locally sourced, and is of small scale (for premises of less than 100 sqm). Most large space users tend to look to either the motorway related office parks associated with the M6 or M65, to meet their needs. Modern office space provision is mainly limited to Barrow Brook Business Park.

10.17 Across the Borough demand indications are for industrial premises of up to 1,000 sqm. There is no particular preference towards either freehold or leasehold property.

Industrial Market

10.18 Companies already established in Ribble Valley are mainly looking for budget or moderate quality accommodation of up to 500 sqm. There is no particular preference towards either freehold or leasehold accommodation.

10.19 Around 26,000 sqm of industrial space is currently vacant – 6.8 percent of the total floorspace and 6.4 percent by premises numbers. Comparison against a market equilibrium average rate of 7.5 percent suggests Ribble Valley is marginally undersupplied. The overwhelming majority of the available properties are at either Time Technology Park, Simonstone or Salthill Industrial Estate, Clitheroe. Together these locations represent 87 percent of the available premises and 95 percent of the floorspace.

Office Market

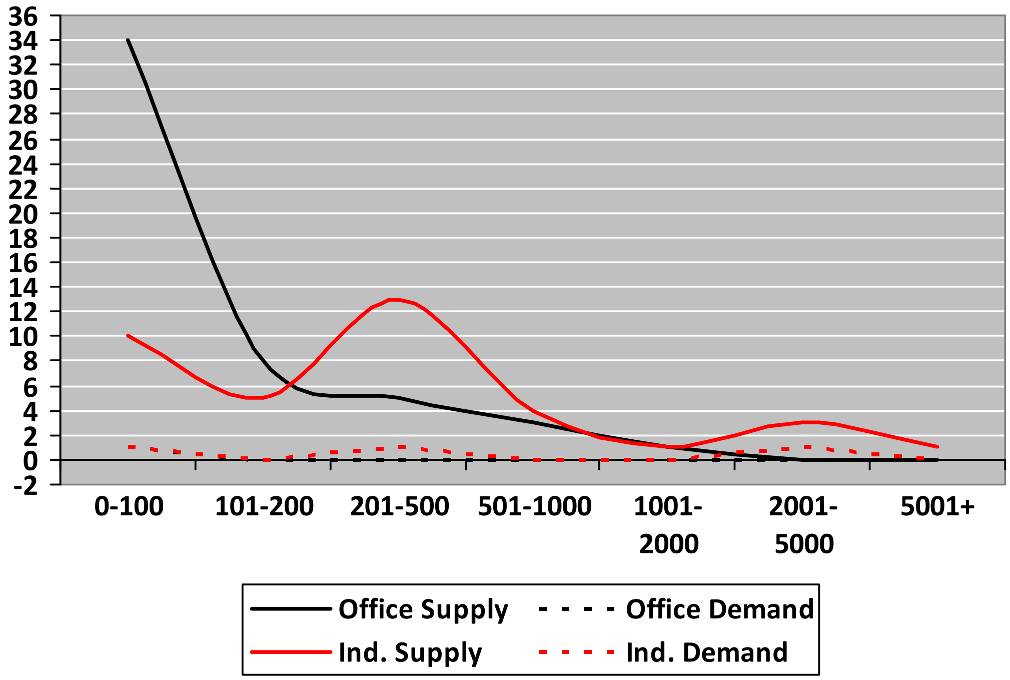
10.20 The Borough's office market is small. According to ONS data half the existing supply stock is located in Clitheroe with the remainder mostly split between smaller settlements in the south and north east of the Ribble Valley. Paradoxically ONS data indicates there is no office floorspace in Simonstone, despite this being the location of most current availability. It is presumed this reflects Time Technology Park's former industrial use prior to conversion to offices. Demand evidence affirms the limited level of interest and that this is weighted towards premises of less than 100 sqm.

10.21 There is 7,055 sqm of vacant office floorspace, which equates to vacancy rates of 28.2 percent by floorspace and 22.4 percent by number of premises. Measured against the 7.5 percent market equilibrium average rate this would suggest Ribble

Valley is substantially oversupplied. However this must be caveated by the fact that analysis of the vacant supply shows half of the premises (69 percent of the available floorspace) is located within one development; there is no freehold property available; two thirds of the supply is focussed in premises of less than 100 sqm, with only four properties available with floorspace in excess of 500 sqm.

10.22 Table 50 balances the requirements identified in the company survey undertaken as part of this study against the premises supply identified by this research.

Table 50 – Ribble Valley Property Supply and Demand



Source: BE Group 2013

Current Land Availability

10.23 Ribble Valley's current potential employment land resource (at 31 March 2012) amounts to 20.00 ha, located across 12 sites. These sites represent unimplemented and partially implemented planning permissions. The majority of the sites are small; with almost two-thirds being less than 1.2 ha, and indeed over one third are less than 1 ha.

10.24 The land supply is dominated by just two locations, Barrow Brook Business Park and Samlesbury Aerodrome. They comprise 86.7 percent of the resource.

10.25 The market suitability of most of the available supply is applicable to either offices or industrial and warehousing activity. Only two sites totalling 3.57 ha are available exclusively for office use. And only three sites, totalling 1.83 ha are exclusively for industrial use.

10.26 Around 22 percent of the existing headline land supply is no longer available for employment use as the owners have been granted planning (on appeal) for residential development.

10.27 Over 53 percent of the Borough's land supply is immediately available. Another 44 percent could be brought forward within the medium term (up to five years).

Employment Areas

10.28 The Borough's main Employment Areas have been appraised in order to provide guidance as to their continued viability.

10.29 They have been grouped within a site hierarchy structure to reflect their ranking one against another. These are graded in the context of Ribble Valley, not at a sub-regional or wider level. One employment area, because of its functions, is included in more than one category. Table 51 summarises the hierarchy and rankings.

Table 51 – Employment Areas – Sites Hierarchy

Employment Area	Flagship	Narrow Band	Key Employment	Key Local	Key Rural
Barrow Brook Business Park	✓				
Samlesbury Enterprise Zone	✓	✓			
Link 59 Business Park			✓		
Salthill Industrial Estate			✓		
Shay Lane Industrial Estate			✓		
Time Technology Park			✓		
Bee Mill, Ribchester				✓	
De Lacy Business				✓	

Employment Area	Flagship	Narrow Band	Key Employment	Key Local	Key Rural
Centre					
Fern Court Business Centre				✓	
Pendle Trading Estate				✓	
Primrose Studies				✓	
The Sidings				✓	
Asturian House					✓
Fairfield Business Park					✓
Gisburn Business Park					✓
Manor Court, Salesbury Hall					✓
Mill Lane Industrial Estate					✓
Poors'land Barn					✓
Brockhall Business Centre					✓
Root Hill Estate Yard					✓
Whalley Industrial Park					✓

Source: BE Group 2013

Impact of Neighbouring Areas

10.30 Ribble Valley shares boundaries with nine local authorities – Lancaster, Craven, Wyre, Preston, South Ribble, Blackburn with Darwen, Hyndburn, Burnley and Pendle. All have been consulted.

10.31 All of the local authority areas that adjoin Ribble Valley indicate they are able to meet their employment land needs through a mixture of existing and proposed additional land allocations. As a consequence none expect to have to look to Ribble Valley to meet any shortfalls in employment land or premises supply. Most consider there have few direct links with Ribble Valley. Pendle, for example sees its connections along the M65 corridor to Burnley or east into Yorkshire. Craven is part of the West Yorkshire economic market.

10.32 Burnley has the fully developed Shuttleworth Mead Business Park close to Simonstone. There is no scope for further expansion. However, should the findings of its own current Employment Land Review study show a supply shortfall then new allocations will be focused at the Borough's strategic employment sites in Burnley or at Junction 9, M65.

10.33 Hyndburn's adopted Core Strategy seeks to allocate 58 ha of additional employment land through to 2026. Major allocations include a strategic regional employment site at Junction 6, M65. Its closest existing site to Ribble Valley, Altham Business Park, is fully developed, although the Core Strategy allows a small greenfield extension.

10.34 Preston's large existing land supply and comparatively modest future requirements mean that the city is self sufficient for employment land. Much of the supply is to the east of the city, geared to the M6 motorway. In terms of linkages with Ribble Valley, Central Lancashire Core Strategy Policy One 'Locating Growth' identifies Longridge as a key service centre, and notes land within Central Lancashire (i.e. Preston) may be required to support its development. The City Council's emerging Sites Allocation and Development Management Policies DPD proposes a 19 ha site at Whittingham Road, Longridge for mixed use including B Class employment, though the current planning application for the site restricts this to only 515 sqm of B1(a) offices.

10.35 South Ribble shares the Samlesbury Enterprise Zone with Ribble Valley. It has allocations or proposals that will deliver its identified employment land need to 2026. These include the Cuerden strategic site adjacent to the M65/M6 intersection.

10.36 The neighbouring authorities are supportive of the Samlesbury Enterprise Zone proposals, acknowledging the economic benefit to the wider sub-region, including scope to draw in supply chain functions that do not meet the Enterprise Zone qualification criteria. It is considered the latter may be attracted to sites associated with the M6 or M65 corridors, rather than look to local solutions within Ribble Valley.

10.37 Only two of the Ribble Valley's Parish and Town Councils have identified need for more local employment premises. Clitheroe Town Council suggest land at the Clitheroe Community Hospital might be used for medical services facilities. Longridge Town Council consider there is a strong need for further employment provision in the town, especially in view of its growth role for new housing. Whilst extension of Shay Lane would be appropriate in market terms, the physical challenges of delivery are acknowledged. As such other sites are suggested, some of which are within Preston City Council's boundaries. These are referenced later in this section.

Future Land Requirements

10.38 It is a responsibility of local government to support and encourage economic growth. This includes the provision, initially through planning policy of sufficient employment land and premises. Provision must be of the right scale, type, location and be readily available for, and capable of, development. The allocated land must be in sustainable locations and comprise a portfolio that is balanced, to adequately cater to all sectors of the economy i.e. small and large companies, offices and industrial, high and low quality operations.

10.39 Since the Borough's previous Employment Land Study was completed in 2008 there have been changes to the planning policy and strategy landscape. Government has now formally approved the NPPF, which provides the framework for the production of local and neighbourhood plans. The NPPF replaces all the previous Planning Policy Statements and Guidance Notes. In addition Government has announced changes regarding permitted development rights, which will allow blanket change of use from B1 (a) offices to C3 residential for existing office buildings – although there is limited scope to argue for local exemptions.

10.40 This study is primarily concerned with those uses included within the planning Use Class B (B1, offices, research and development and light industrial; B2, general industrial; B8, storage and distribution) and appropriate sui generis uses including recycling and the environmental industry. It considers a number of different employment land scenarios. All look at the situation as it stands now. As such the land supply required is balanced against what is currently available. Furthermore it sets forecasts for a sixteen year period (to 2028).

10.41 There is no definitive model for forecasting future employment land needs. Three 'policy off' based models have been used to assess future employment land provision. These are the projection forward of historic land take-up (based on both long and short term trends); a forecast based on employment sector change and one of labour supply projections. A further two 'policy on' models (employment sector change and labour supply) have been used, reflecting the Enterprise Zone status awarded to part of BAE Systems' site at Samlesbury.

10.42 From data provided it has been possible to establish long term (14 years) and short term (5 years) trends that can be used in the projection forward of historic take-up rates achieved in Ribble Valley. This trend based forecast merely reflects and perpetuates the economic circumstances of the past two decades. It takes no account of the changes in economic activity that may arise from the implementation of sub-regional initiatives, such as the recently announced Enterprise Zone.

10.43 The take-up evidence shows a fluctuating picture. The long term annual average is 1.13 ha. This is marginally above the 1.07 ha figure reported in the 2008 study. This is because the last five years' take-up has been higher at 1.26 ha. This is somewhat surprising as this has been a period of economic recession, but is testimony to the resilience of the Ribble Valley local economy.

10.44 The long term take-up forecast suggests a need for 18.08 ha for the period 2012-2028. Incorporating a five year take-up buffer to provide a choice and range of sites and a continuum of supply beyond the Plan period, indicates a shortfall of 3.73 ha against the current headline supply. However when potential loss from the headline supply is taken into account, this suggests an increased shortfall of 8.05 ha.

10.45 The short term (5 years) take-up trend generates a greater need of 20.16 ha. When allowance is made for a five years buffer at the same rate, the shortfall against the current headline supply figure becomes 6.46 ha. After taking into account the potential loss from the headline supply then a shortfall of 10.78 ha is identified.

10.46 The employment based forecast indicates that over the Plan period there would be need for between 1.0 and 4.9 ha less land before taking into account the current headline supply. Even after the inclusion of the five years buffer figure to allow for a range and choice of sites (based on the long term take up rate) this model suggests there is a surplus of between 8.5 and 12.2 ha against the current headline supply (in other words the worst case is that as much as 60 percent of the current supply could be de-allocated). This reduces to between 4.2 and 8.0 ha when the potentially unavailable land is removed from the supply figure.

10.47 For the labour supply forecast there is also a suggested surplus of between 9.2 and 10.2 ha. This reduces to 4.9 to 5.7 ha when the headline figure is adjusted to take account of potential losses.

10.48 However the employment and labour supply methods make no allowance for companies modernising or relocating into different sized property; that land is not used totally efficiently; that some companies occupy more space than they need or will hold land long term for their own possible future expansion; or that there needs to be a range of sites and locations to provide companies with choice. Therefore common sense suggests the assessments based on the forecasts are flawed, even though their principles of limited job growth and higher density land use are correct.

10.49 'Policy on' forecasts to take account of the Samlesbury Enterprise Zone generate contrasting outcomes. The 'policy on' employment based forecast generates an additional need of between 20 and 22 ha compared to the 'policy off' employment based scenario. However it is presumed this would be substantially accommodated by the Enterprise Zone, which does not form part of the general employment land supply.

10.50 The 'policy on' labour supply forecast suggests a need of between 14 and 16 ha. Set against the headline supply position this suggests as much as 30 percent of the current supply could be considered surplus. However even this represents a minimum case position as some of the employment will be associated with the Enterprise Zone and would not therefore relate to the general employment land supply.

10.51 A summary of the various forecast scenarios is set out in Table 52. They relate solely to the Plan period 2012-2028 and illustrate the effect of a five year buffer as proposed in Section 9.0, to facilitate an ongoing range and choice of sites to accommodate the anticipated structural change in employment sectors and a continuum of available supply beyond 2028.

Table 52 – Land Forecast Models –Summary

Model	Land Stock 2012[1], ha	Land Need 2012-2028, ha	Buffer (5 years take-up rate), ha	Surplus (shortfall), ha[2]	Assumptions
Long Term Land Take-up	20.00	18.08	5.65	(3.73)	Based on historic (14 years) take-up of1.13 ha/pa
Short Term Land Take-up	20.00	20.16	6.30	(6.46)	Based on last five years take up of 1.26 ha/pa
Employment Based	20.00	-0.99/-4.94	5.65	15.34/19.29	Based on projected growth/reduction of employment in

Model	Land Stock 2012[1], ha	Land Need 2012-2028, ha	Buffer (5 years take-up rate), ha	Surplus (shortfall), ha[2]	Assumptions
					industry sectors and inclusion of historic take up buffer
Labour Supply	20.00	3.40/4.11	5.65	10.24/10.95	Based on population projections and industry sector changes (growth/reduction) and impact on floorspace (and thus land) need, and inclusion of historic take up buffer.
Policy 'On' (linked to Enterprise Zone) Employment Based	20.00	22.95/24.64	5.65	(8.60/10.29)	As per employment based policy of model but reflects Enterprise Zone forecasts
Policy 'On' (linked to Enterprise Zone) Labour Supply	20.00	14.10/15.75	5.65	0.25/(1.40)	As per labour supply policy off model but reflects Enterprise Zone forecasts

Source: BE Group, 2012

[1] N.B. Headline supply at 31 March 2012

[2] N.B. Where alternative figures are shown this reflects the different job densities for different job types

10.52 The variation in the outcome figures demonstrates the uncertainty of forecasting. The long and short term land take-up scenarios suggest there would be a shortfall against the headline supply of as much as 6.5 ha. The 'policy on' models also indicate shortfalls of up to 10.3 ha. However as these relate to the introduction of the Enterprise Zone there is need to acknowledge that generated land requirements will to some extent be met within the Enterprise Zone and this is not part of the general employment land supply for Ribble Valley. The 'policy off' employment and labour supply forecasts provide contrary conclusions, suggesting there is an over-provision of employment land based against the headline supply figure, varying from 10.2 to 19.3 ha.

10.53 However, 4.32 ha of the headline supply is now unlikely to be available due to an alternative use planning consent secured on appeal. The effect of this would, for the historic trend take-up models increase the shortfall in supply to between 8.0 and 10.75 ha. It would also raise the shortfall associated with the 'policy on' models to be between 4 and 14.5 ha. For the 'policy off' models there would be a deduction in the forecast level of over-provision – but in the context of Ribble Valley this would still be sizeable.

10.54 Table 53 compares the forecast employment land need and the projected shortfall/surplus for both the headline (perceived) available supply (20.00 ha) and the realistic supply (15.68 ha).

Table 53 – Land Forecast Models Reflecting Perceived & Residual Supply

Model	Land Need, ha 2012-2028 (including 5 years Buffer)	Perceived Surplus (Shortfall) to 2028 Headline Supply (20.00 ha)	Predicted Surplus (Shortfall) to 2028 Realistic Supply (15.68 ha)
Long Term Land Take-up	23.73	(3.73)	(8.05)
Short Term Land Take-up	26.46	(6.46)	(10.78)
Employment Based	6.75/10.55	9.45/13.25	5.13/8.93
Labour Supply	9.05/10.55	10.25/10.95	5.93/6.63
Policy 'On' (linked to Enterprise Zone) Employment Based	28.60/30.31	(8.60/10.31)	(12.92/14.63)
Policy 'On' (linked to Enterprise Zone) Labour Supply	19.75/21.40	0.25/(1.40)	(4.07/5.72)

Source: BE Group 2013

10.55 The application of 'policy off' economic forecasts indicates the Borough needs less employment land than already exists. At best they suggest only half of the currently allocated or consented but undeveloped land in Ribble Valley is required. However, they do refer to a net need, taking no account of requirements for the recycling or renewal of property. Nor do they reflect that the headline supply is overwhelmingly concentrated at just two locations – Barrow Brook Business Park and Samlesbury Aerodrome.

10.56 Consequently these forecasts should be seen as a 'direction of travel' rather than as specific targets to be set to be met. The inference therefore is to lower the need for land using the rolling forward of historic employment land take-up experience.

10.57 In terms of future land needs from non B-class employment sectors, this study suggests land requirements for more are likely to be at best modest (less than 3 ha). This is largely because many will use land already held by the relevant provider, or because the use can be incorporated within mixed-use developments, often town centre based.

Providing for Structural Change

10.58 The complexities of structural change make it difficult to be confident about the true scale or nature of future employment land needs through to 2028, especially when what is actually happening on the ground – where industrial demand continues to outpace office demand – is contrary to expected forecasts. The differential between 'policy off' and 'policy on' will require careful monitoring over the Plan period, alongside the need to recognise the redundancy of poor quality employment sites and premises and to encourage the recycling of less suitable older stock to make way for premises better suited to meet modern requirements. In practice, this can only be realistically addressed by ensuring that a good range of suitable sites is maintained throughout the Plan period to stimulate local company growth, inward investment and emerging industries including supply chain opportunities associated with the Enterprise Zone occupiers, as well as to provide for choice and for 'room to manoeuvre', to enable any necessary structural change to occur.

10.59 Structural change will also have implications for the type of land required. Notwithstanding manufacturing will continue to be important to Ribble Valley (but largely associated with BAE Systems), there is need to ensure that future sites and premises provision is suited to the requirements of the service industry sector. To attract and retain these occupiers, environmental setting, accessibility and provision of support facilities for the workforce, are expected to assume much greater importance as part of the wider need to directly address the quality of the land supply.

Potential Future Allocations

10.60 The draft Core Strategy states a further 9 ha of employment land will be allocated over the plan period to 2028. As noted above this study has indicated a shortfall in the current headline supply of just under 4 ha, when assessed against the long term take-up trend. This increases to 8 ha, when land now unlikely to be brought forward for employment use is excluded. The two figures are therefore closely aligned.

10.61 In view of the identified shortfall of land provision, and the spatial distribution of the current supply, consideration has been given to potential employment sites that might form part of any future allocations.

10.62 The 2008 study identified a number of potential new employment sites, some of which have since been developed for other uses, principally housing. One, Barrow Brook Business Park extension, now forms part of the headline employment land supply. Two sites, Salthill Industrial Estate Extension and Sidings Business Park Extension remain as potential future opportunities.

10.63 The draft Core Strategy indicates that employment should be directed to Clitheroe, Longridge, Whalley and sites associated with the A59 corridor. At present there is no available employment land provision within Longridge or Whalley. For Whalley this situation could be addressed by Sidings Business Park Extension – an area of approximately 2 ha.

10.64 Longridge is planned to accommodate substantial housing growth, with some of this taking place within the adjoining Preston City Council area. The City Council wishes to see mixed use development on the former TDG site on Whittingham Lane, which would deliver some level of employment use. The current planning application for the site does however only allow for a small amount of B1 office space. With all currently allocated employment land in use in Longridge, it is considered the Borough Council should pursue some new allocation in order to address sustainability issues for what is acknowledged as a key service centre.

10.65 The 2008 Study – suggested land south of Chapel Hill remains the subject of constraint due to ground contamination. As such two possible other options have been identified. One is at the eastern edge of Longridge, at College Farm, Blackburn Road. This is well connected in that access back to Preston and the M6 motorway would not necessitate road traffic passing through the town. The second option is land to the rear of Sainsbury's store to the north of the town centre. This adjoins what was historically an employment site, but would require traffic passing through the town's built up are in order to access the route to Preston.

10.66 For Clitheroe there are also two opportunities, both of which meet the criteria for proximity to existing development and to the A59. One, Salthill Industrial Estate extension was identified as part of the 2008 study as potentially of a size up to 26 ha, capable of accommodating B1, B2 and B8 uses. The second is identified in the draft Core Strategy, at Standen, south east Clitheroe. This is a proposed mixed use scheme that would include B1 development. The development scale is not known. The draft Core Strategy notes the development area is to be addressed in the Development Plan and Supplementary Planning Documents.

10.67 BE Group conclude that these opportunities identified for Clitheroe, Longridge and Whalley provide sufficient scope to meet the employment land needs of Ribble Valley through to 2028.

11.0 RECOMMENDATIONS

Introduction

11.1 This section sets out the consultants' recommendations arising from the Employment Land and Premises Review. The recommendations in this report have had full regard to the requirements of the NPPF to encourage and deliver growth through the planning system. The recommendations are grouped around four aspects:

- Employment Land Supply
- Spatial Implications
- Provision of Premises
- External Influences.

Employment Land Supply

Recommendation 1 – Employment Land Provision Definition

11.2 The NPPF does not define employment land provision within the main document. However Annex 2 defines economic development as "*development, including those uses within the B use classes, public and community uses and main town centre uses (but excluding housing development)*".

11.3 For the purpose of this study the current available land supply in Ribble Valley is defined as the twelve sites with unimplemented or partially implemented planning consents as at 31 March 2012. These total 20.00 ha and are identified in Section 6.0 Table 29.

Recommendation 2 – Employment Sites and Areas to be Retained

11.4 As is discussed in Section 10.0, existing sites and premises provide valuable opportunities for employment close to where people live. They benefit the local economy, and the loss of employment uses can negatively impact on local access to jobs and the economic competitiveness of local areas. Ultimately this challenges the Borough's economic growth.

11.5 The relative scarcity of a range and choice of available developable employment land, due to the domination of the supply by just two locations, alongside the issues outlined above, means there is strong economic justification for the ongoing protection of employment land in Ribble Valley.

11.6 The NPPF provides the opportunity for Ribble Valley Borough Council to identify 'key employment sites' that are considered to significantly contribute to the Borough's land supply for B class uses. It enables these to be safeguarded for B class uses and other employment uses which achieve economic enhancement without detrimental impact to either the site or the wider area.

11.7 The Employment Areas' assessment (Section 6.0) determines a hierarchy of sites/ locations. From these a small number are identified of being of a scale or of local economic value that aligns to the NPPF 'key employment sites' designation. It is recommended that Ribble Valley Borough Council therefore designates the following as key employment sites to be safeguarded for B Class uses and other employment uses which achieve economic enhancement without detrimental impact to either the site or the wider area:

- Barrow Brook Business Park, Barrow
- Samlesbury Aerodrome
- The Sidings, Whalley
- Salthill Industrial Estate, Clitheroe
- Shay Lane Industrial Estate, Longridge
- Time Technology Park, Simonstone.

11.8 Within these 'key employment sites' as a rule only applications for B class use should be permitted. Non- B Class uses should only be allowed within these sites if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses. The use for employment purposes other than B class uses may be appropriate but only if it can be shown that the use provides on-site support facilities or demonstrates an economic enhancement over and above B class uses. Such development should however not prejudice the efficient and effective uses of the remainder of the employment area.

11.9 Retail uses should not generally be supported on employment sites. Exceptionally, uses which have trade links with employment uses or are un-neighbourly in character (such as car showrooms, tyre and exhaust centres, or trade counters) may be permitted on employment sites which have good access to a range of sustainable transport options.

11.10 Where non-B Class uses are proposed for, or within, those sites then Ribble Valley Borough Council should require the applicants to demonstrate that:

- the site/premises are no longer suitable or reasonably capable of being redeveloped for employment purposes, and
- the site/premises has been proactively marketed for employment purposes for a reasonable period of time (a minimum of twelve months) at a reasonable market rate (i.e. rent or capital value) as supported through a documented formal marketing strategy and campaign, or
- there will be a significant community benefit which outweighs the impact of losing the employment site/premises.

11.11 At Appendix 9 Developer Marketing Standards are set out that provide the template for delivering the evidence that premises or sites have been appropriately marketed without success. Whilst these are primarily directed at B Use Class situations they are equally applicable to other property types e.g. public houses, retail outlets.

11.12 For Ribble Valley's remaining employment areas, a more flexible approach could be taken to help facilitate a broad range of economic development, which is vital for the future sustainability and development of the local area's economy. In some cases, the size, location and characteristics of a site may mean that a more intensive mixed-use development could provide greater benefit to the local community, in terms of addressing local needs, than if the site was retained solely in employment use. However, Ribble Valley Borough Council should look to ensure that any proposal for mixed-use redevelopment (incorporating both employment and non-employment uses) must retain an equivalent amount of jobs on the site. Where a site is vacant or underused then consideration should be given to its potential for job creation rather than the existing number of jobs. The Council should also ensure that any such use (for example a noise sensitive use such as residential) does not prejudice the future operation of adjacent or adjoining employment uses.

11.13 Ribble Valley Borough Council should also recognise the increasing level of precedents of non-B use employment activity provision within employment areas across the UK. Sui generis uses, such as vets practices, and D1 non-residential institutions including training centres, nurseries/children's play facilities and activity centres do generate employment opportunities. Such applications within the

Borough should be treated on their individual merits, including employment outputs, but should be restricted to the non- 'key employment sites'.

11.14 It is suggested that in terms of protecting employment sites that do not sit within Employment Areas, the redevelopment of employment land and premises for non-employment uses be allowed in the following circumstances:

- The present (or previous, if vacant or derelict) use causes significant harm to the character or amenities of the surrounding area, and it is demonstrated that no other appropriate viable alternative employment uses could be attracted to the site, or
- Mixed-use redevelopment would provide important community and/or regeneration benefits with no significant loss of jobs, potential jobs, and the proposed mix of uses accords with other planning policies.

11.15 This advice is offered without consideration of other planning, traffic/highways issues, etc. which might render some uses or mixed use developments inappropriate on particular employment sites. It is clearly for Ribble Valley Borough Council to judge proposals on their merits taking account of these factors.

11.16 If land within employment areas or employment sites (allocations) outside employment areas is lost to other uses, – then an equivalent amount of land should be identified elsewhere to ensure a sufficient overall land supply in the Borough is maintained.

Recommendation 3 – Future Employment Land Provision

11.17 The perceived land supply of 20.00 ha, at April 2012, suggests a shortfall of 3.73 ha when measured against a roll forward of the long term land take-up experience. The shortfall increases to 8.0 ha when land unlikely to be brought forward is excluded.

11.18 The forecasts of future population (labour supply) and industry sector activity (jobs), suggest there will be a substantial surplus of employment land, so much so that at least half the currently available land would be surplus to requirements. There would still be a surplus when measured against the residual supply following the exclusion of land that is unlikely to be brought forward.

11.19 The 'policy on' model forecasts, reflecting the Samlesbury Enterprise Zone, also suggest the current land supply would be insufficient to meet future needs. The employment based model suggests a larger shortfall (of almost 15 ha) than the labour supply (up to 5.75 ha), though the Enterprise Zone will deliver land that is excluded from the general supply that is addressed by this study.

11.20 However, BE Group does not recommend that the economic forecasts be the basis for defining employment land provision for the Local Plan period. This is because the forecasts represent the absolute minimum amount of land required to accommodate the activities of different industry sectors. Furthermore they take no account:

- that within sectors expected to decline (particularly manufacturing) there will still be businesses that will grow and expand
- that there will be local market churn
- that there will be need to maintain a choice of supply by size, type, location and quality of sites and premises for businesses at differing levels of their maturity
- that there should be a continuing forward supply to accommodate site development beyond the end of the Local Plan period
- of reference to the level and nature of the existing employment land supply at April 2012
- of addressing the fact the Borough is a net exporter of labour
- that one fifth of the headline land supply at April 2012 is now likely to be lost to non-employment use.

11.21 **It is therefore recommended that Ribble Valley Borough Council use the roll forward of long term take-up experience as the main measure of the Borough's future land needs, to 2028.**

11.22 **It is also recommended that the Council seeks to identify further land allocations for B1 (a, b and c uses), B2 and B uses in the order of 8 ha to meet the shortfall generated by the application of long term take-up performance.**

11.23 Increasing office use will lead to a reduced scale of employment land demand. However, getting there is a different proposition. Therefore it is recommended that Ribble Valley maintains a buffer zone of at least five years historic land take-up. This should be maintained as a five year rolling supply at all times to provide range and choice as well as 'room-to-manoeuvre' to enable the forecast structural change to occur.

11.24 To be safe, Ribble Valley Borough Council should adopt the scenario that the reduced baseline/realistic figure of 15.68 ha identified in Section 6.0, Table 33 actually occurs and that, notwithstanding the recommendations of this study, some land is lost to alternative uses. Where employment sites are lost to other uses, this will need to be re-provided elsewhere in the Borough to ensure a sufficient supply. If it is not possible to identify alternative land under these circumstances, then this should be monitored and addressed at subsequent Employment Land Reviews.

11.25 In recommending the allocation of further employment land BE Group has had regard not just to forecast need levels but also the structure of the existing employment land portfolio. At April 2012 just two locations, made up almost 87 percent of the supply. Two of three main settlements, Longridge and Whalley, have no available land allocations but this is a greater issue for Longridge.

11.26 The draft Core Strategy also identifies Standen, south east of Clitheroe, for new employment land as part of a larger mixed-use development area. However this would be limited to B1 space, whilst demand continues for B2 and B8 uses. The latter two could be accommodated through the Salthill Industrial Estate extension opportunity, identified as part of the 2008 Employment Land and Retail Study.

11.27 **It is recommended that Ribble Valley gives priority to identifying new land allocations in Longridge, and that the possible sites at College Farm and to the rear of Sainsbury's be examined for their suitability.**

11.28 **It is also recommended that Ribble Valley explores the feasibility of bringing forward new allocations at Standen and Salthill that meet the full spectrum of B1 and B2 industrial, and B8 warehousing uses to serve as a continuum of supply for the Clitheroe area.**

Recommendation 4 – Employment Development outside Employment Areas

11.29 This study has not surveyed B use class employment activities associated with solus sites outside current employment land allocations. However, it is accepted that these are activities that make a contribution to local employment activity and jobs. It is also recognised that there may be competing pressures for other non-employment uses on some of these sites, but any consideration of future non-employment use should be addressed in the same way as non 'key employment' sites.

Recommendation 5 – Future Reviews

11.30 BE Group has recommended that allocation of further land to meet forecast need and also to address the structure of the existing employment land portfolio. It has recommended potential locations whose feasibility should be tested to determine their viability and deliverability as components of the future land supply. In view of this Ribble Valley Borough Council should review its employment land portfolio at intervals of around three years. This is broadly in accordance with the NPPF which recommends regular monitoring and review of the local land supply to ensure a robust evidence base.

External Influences

Recommendation 6 – Maintain Awareness of External Influences

11.31 Ribble Valley Borough Council must recognise its role, together with the other Lancashire authorities, in developing the county's economy. In this respect they are interconnected, to varying degrees, on a number of levels.

11.32 Discussions with the nine local authorities whose boundaries abut Ribble Valley indicate that they all have, or expect to have, sufficient land allocations (both existing and proposed) to meet their projected needs. There is therefore no immediate need for them to look to Ribble Valley for support in land provision.

11.33 However, there are still a number of issues and opportunities in which some of the wider area local authorities' interests will overlap, and where joint working is advisable. For example, capitalising on the supplier chain and production spin off opportunities generated by the Samlesbury Enterprise Zone. Or the recognition of Longridge as a key service centre in Central Lancashire, and the potential contribution of development within Preston City Council's boundaries to generate local employment for the town.

Rural Area Development

Recommendation 7 – Definition of Small Scale Rural Offices

11.34 Ribble Valley is characterised as a rural area. As NPPF paragraph 25 references 'small scale rural offices', but does not provide a definition, it is recommended that Ribble Valley takes responsibility for this in order to avoid future debate around individual applications.

11.35 **Our recommendation is that a development threshold be set for small scale rural offices of no more than 1,000 sqm on a single site and that no individual premises should exceed 200 sqm.**

Appendix 1 – Consultees

Admiral Taverns
Aighton, Bailey & Chaigley Parish Council
BAE Systems
Banister Bros & Co Limited
Blackburn with Darwen Borough Council
Burnley Borough Council
Clitheroe Town Council
Craven District Council
Fairfield Business Park
Fern Court Business Centre
Fort Vale Engineering
Hyndburn Borough Council
Julian Hindle
Lancashire County Council
Lancashire Local Enterprise Partnership
Lancaster City Council
Lea Hough & Co
Longridge Town Council
Pendle Borough Council
Preston City Council
Primrose Studios
Robert Pinkus & Co
Smiths Gore
South Ribble Borough Council
Taylor Weaver
Whalley Parish Council
Wyre Borough Council

Appendix 2 – Ribble Valley Vacant Property Schedules

Schedule of Industrial Premises				
Property	**Settlement**	**Tenure**	**Quality**	**Size, Sqm**
Unit 3, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	6,875
Unit 4, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	4,088
Unit 7, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	2,601
Unit 5, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	2,323
Unit 6, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	1,672
Building A, Ajax Business Park, Lincoln Way, Salthill Industrial Estate	Clitheroe	Leasehold	Moderate	900
Unit 0D/E, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	731
Units 7-9, Hawthorne Industrial Estate, Lincoln Way, Salthill Industrial Estate	Clitheroe	Leasehold	Good	587
Unit 22, Deanfield Court, Link 59 Business Park,	Clitheroe	Either	Moderate	511
Unit 0B, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	465
Main Garage/Workshop, Kendal Street Garage, Salthill Road, Salthill Industrial Estate	Clitheroe	Either	Moderate	436
Unit 12, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	381
Unit, Pendle Trading Estate	Chatburn	Freehold	Moderate	355
Unit 4, Hawthorne Industrial Estate, Lincoln Way	Clitheroe	Leasehold	Good	330
Building C, Ajax Business Park, Lincoln Way, Salthill Industrial Estate	Clitheroe	Leasehold	Moderate	300
Building D, Ajax Business Park, Lincoln Way, Salthill Industrial Estate	Clitheroe	Leasehold	Moderate	300
Unit 5D, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	297
Unit 34, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	293
Middle Workshop/Mezzanine, Kendal Street Garage, Salthill Road, Salthill Industrial Estate	Clitheroe	Either	Moderate	258
Unit 7, Hawthorne Industrial Estate, Lincoln Way, Salthill Industrial Estate	Clitheroe	Leasehold	Good	247

Schedule of Industrial Premises				
Property	**Settlement**	**Tenure**	**Quality**	**Size, Sqm**
Unit 32, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	240
Unit 33, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	233
Unit 3, Hawthorne Industrial Estate, Lincoln Way, Salthill Industrial Estate	Clitheroe	Leasehold	Good	227
Unit 2, Hawthorne Industrial Estate, Lincoln Way, Salthill Industrial Estate	Clitheroe	Leasehold	Good	200
End Workshop, Kendal Street Garage, Salthill Road	Clitheroe	Either	Moderate	156
Unit A, Hall Street	Clitheroe	Leasehold	Good	132
Unit B, Hall Street	Clitheroe	Leasehold	Good	132
Unit 7A, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	104
Warwick Street	Longridge	Leasehold	Budget	97
Unit 30, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	91
Unit 23, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	66
Unit 25, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	66
Unit 28, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	64
Unit 27, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	56
Unit 24, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	42
Unit 29, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	42
Unit 31, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	42
Unit 26, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	19

Source: BE Group, 2013

Schedule of Office Premises				
Property	**Settlement**	**Tenure**	**Quality**	**Size, Sqm**
Suite 109, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	1,129
Suite 215, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	743
Suite 109, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	736
First Floor, Enterprise Works, Salthill Road, Salthill Industrial Estate	Clitheroe	Leasehold	Moderate	616
Suite 129, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	260
Suite 132, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	251
Suite 133, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	244
Suite 134, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	241
Suite 108, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	233
Suite 130, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	189
Suite 110, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	179
Suite 110, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	179
Suite 1, Gisburn Business Park, Gisburn Road	Gisburn	Leasehold	Moderate	174
First and Second Floors, Bank House, King Street	Clitheroe	Leasehold	Moderate	170
Suite 9, The Courtyard, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	132
Suite 131, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	116
Suite 4, De Lacy Business Centre, Second Floor, De Lacy House, Station Road	Clitheroe	Leasehold	Moderate	110
Suite 3, Ground Floor, Brockhall Business Centre	Brockhall Village	Leasehold	Moderate	89
Suite 4, First Floor, Brockhall Business Centre	Brockhall Village	Leasehold	Moderate	87
Unit 22, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	72
Suite 32/33, First Floor, Business	Ribchester	Leasehold	Moderate	72

Schedule of Office Premises				
Property	**Settlement**	**Tenure**	**Quality**	**Size, Sqm**
Centre, Manor Court, Salesbury Hall				
Suite 28, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	71
Suite 4, Bellman Mill, Salthill Industrial Estate	Clitheroe	Leasehold	Moderate	69
Suite 2, Bellman Mill, Salthill Industrial Estate	Clitheroe	Leasehold	Moderate	52
Suite 29, First Floor, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	52
Suite 2, The Printworks, Whalley Road	Barrow	Leasehold	Moderate	50
Suite 2, De Lacy Business Centre, Second Floor, De Lacy House, Station Road	Clitheroe	Leasehold	Moderate	46
Suite 201, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	40
Ground Floor, Asturian House	Ribchester	Leasehold	Moderate	40
Suite 22, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	39
Suite 135, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	38
Suite 136, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	38
Suite 137, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	38
Suite 34, First Floor, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	35
Suite 36, First Floor, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	35
Ground Floor, The Business Centre, Stanley Street	Longridge	Leasehold	Moderate	34
Suite 3, De Lacy Business Centre, Second Floor, De Lacy House, Station Road	Clitheroe	Leasehold	Moderate	33
Suite 35, First Floor, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	30
Suite 24, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	28
Suite 25, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	28
Suite 37, First Floor, Business Centre, Manor Court, Salesbury Hall	Ribchester	Leasehold	Moderate	26
Suite 208, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	23

Schedule of Office Premises				
Property	**Settlement**	**Tenure**	**Quality**	**Size, Sqm**
Suite 209, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	23
Suite 212, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	23
Suite 215, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	23
Suite 118, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	23
Suite 1, De Lacy Business Centre, Second Floor, De Lacy House, Station Road	Clitheroe	Leasehold	Moderate	22
Suite 204, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	20
Suite 203, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	19
Suite 211, Time Technology Park, Blackburn Road	Simonstone	Leasehold	Moderate	19
Office 4, Primrose Studios, Primrose Road	Clitheroe	Leasehold	Moderate	16

Source: BE Group, 2013

Appendix 3 – Potential Employment Sites Monitoring Appraisal

The Council track a large number of sites as part of its annual monitoring. However an assessment of them indicates that most are to be excluded on the basis that they are below the 0.25 ha threshold (contained in ODPM Employment Land Review Guidance), or refer to building conversions/rebuilds rather than being sites. In most cases the proposed employment floorspace has been given an equivalent employment land figure using a multiplier of 3,900 sqm/ha. This equates to a typical industrial estate/business park development density for both office and industrial schemes. This appendix outlines the assumptions made about sites included in the Council's monitoring records, explaining why certain sites have been deleted or why revised site areas have been used.

Employment Sites Monitoring Appraisal*

Category	Address	Original Size, ha	Revised Size, ha	Comment
Employment site	Papillion Site (2), Barrow Brook Business Park, Barrow	0.875	4.32	8,746 sqm of B1(a) office floorspace is proposed (with a further 2,486 sqm in future phases) This will require 2.88 ha at a development density of 3,900 sqm/ha However, both the planning application and previous Employment Land and Retail Study suggest a larger size of 4.32 ha
Employment site	Land North of Barrow Brook Business Village, Barrow	1.300	3.33	12,975 sqm of B1/B2/B8 office/industrial floorspace is proposed This will require 3.33 ha at a development density of 3,900 sqm/ha
Employment site	BAE Systems. Samlesbury Aerodrome, Myerscough Road, Balderstone	1.979	2.69	Outline permission for 57,884 sqm of B2 premises and 39,048sqm of B1(a), of which 8,000 sqm of industrial and 11,789 sqm of offices remains undeveloped (less 9,300 sqm of offices which is included as a reserved matters permission (Building 611 site) below) = 10,489 sqm of undeveloped floorspace This will require 2.69 ha at a development density of 3,900 sqm/ha
Employment site	Land off Hey Road, Barrow Brook Business Village	5.760	2.43	Outline permission for B1, B2, B8 uses on a 5.76 ha site. Site size is as stated in the

Category	Address	Original Size, ha	Revised Size, ha	Comment
	Barrow			planning application, the amount of floorspace to be delivered is not known at this stage However, the planning permission also extends to include the 3.33 ha 'Land North of Barrow Brook Business Village' site (above). 3.33 ha has therefore been removed to avoid double counting.
Employment site	Building 611, Samlesbury Aerodrome, Myerscough Road, Balderstone	0.930	2.38	Reserved matters permission for a 9,300 sqm B1(a) office building (links to the above outline permission) This will require 2.38 ha at a development density of 3,900 sqm/ha
Building conversion	Roefield Reach, Edisford Road, Clitheroe	0.659	1.69	Converting buildings into 6,594 sqm of B1(a) office space Excluded as building conversion
Employment site	Hindle and Schofield Site, Barrow Brook Business Park, Barrow	0.227	1.19	2,271 sqm of B1(a) office floorspace is proposed, with a further 2,382 sqm suggested over the long term This will require 1.19 ha at a development density of 3,900 sqm/ha
Employment site	Casting Foundry Site, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	0.341	0.87	3,412 sqm of B2 industrial floorspace is proposed This will require 0.87ha at a development density of 3,900 sqm/ha
Building extension/ employment site	Rear of Building S, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	0.194	0.50	Building extension/new development to deliver 1,950 sqm of B1(c)/B2 industrial floorspace This will require 0.50 ha at a development density of 3,900 sqm/ha
Employment site	Land at Salthill Industrial Estate, Lincoln Way, Clitheroe	0.15	0.46	Outline planning permission for 1,508 sqm of B1(c)/B8 industrial/trade floorspace, plus full planning permission for a further 294 sqm of B8 trade floorspace This will require 0.39 ha at a development density of 3,900 sqm/ha

Category	Address	Original Size, ha	Revised Size, ha	Comment
Employment site	Land Adj. to Simonstone Lane, Time Technology Park, Simonstone	0.177	0.45	1,769 sqm of B1/B2/B8 floorspace is proposed This will require 0.45 ha at a development density of 3,900 sqm/ha
Rebuild/ employment site	B Dugdale and Son, Bellman Mill, Salthill, Clitheroe	0.148	0.38	Rebuild of existing office building, plus seven new industrial units. 1,476 sqm of B1(a and c) office/industrial floorspace is proposed This will require 0.38 ha at a development density of 3,900 sqm/ha
Employment site	Land adjacent to The Spinney, Grindleton	0.073	0.19	738 sqm of B1(a) office floorspace is proposed This will require 0.19 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Building extension/ employment site	Altham Pumping Station, Burnley Road, Simonstone	0.069	0.18	Building extension/new development to deliver 697 sqm of B1(c) industrial floorspace This will require 0.18 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Employment site	Land adjacent to Myerscough Road, Mellor Brook	0.071	0.18	716 sqm of B1(a) office floorspace is proposed This will require 0.18 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Employment site	Monks Contractors, Myerscough Smithy Road, Mellor Brook	0.066	0.17	660 sqm B1(c) workshop is proposed This will require 0.17 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Rebuild/ employment site	Jones Stroud Insulations, Queen Street, Longridge	0.061	0.16	Demolition and rebuild of an enlarged B2 industrial unit Below 0.25 ha threshold Excluded
Building conversion	18 Castle Gate, Clitheroe	0.007	0.12	Converting buildings to provide 72 sqm upper floor office space Excluded as change of use
Employment site	Clitheroe Auction Mart,	0.030	0.08	300 sqm of B1(c)/B2/B8 (or A1 retail) industrial/warehouse

Category	Address	Original Size, ha	Revised Size, ha	Comment
	Ribblesdale Centre, Lincoln Way, Clitheroe			floorspace is proposed This will require 0.08 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Employment site	Mitton Hall Kennels, 2 Mitton Hall Cottages, Mitton	0.024	0.06	246 sqm of B1(c) industrial floorspace is proposed This will require 0.06 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Building conversion	Mill adjacent Primrose House, Primrose Road, Clitheroe	0.024	0.06	Converting buildings into 240 sqm of B1(b) design workshop accommodation Excluded as building conversion
Building conversion	Fishes and Peggy Hill Farm, Henthorne Road, Clitheroe	0.042	0.04	Converting farm buildings into 428 sqm of B1(c)/B2 industrial space Excluded as building conversion
Building conversion	The Village Hall, Franklin Hill, Brockhall Village	0.015	0.04	Converting a 154 sqm D1 village hall into B1(a) Excluded as building conversion
Rebuild	Mill Lane Depot, Mill Lane, Hesketh Lane, Chipping	0.013	0.03	Demolition and rebuild of B1(c) maintenance sheds with a B1(c)/B1(a) workshop/office Below 0.25 ha threshold Excluded
Rebuild/ building extension	Empress Fencing, Clitheroe Road, Chatburn	0.018	0.03	Rebuild and enlargement of a retail, sales and storage facility Below 0.25 ha threshold Excluded
Employment site	Laythams Farm, Back Lane, Slaidburn	0.013	0.03	131 sqm of A1/B1(c)/B2/B8 retail/industrial/warehouse floorspace is proposed This will require 0.03 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Building conversion	Utilities White Bull WTW, Preston Road, Longridge	0.012	0.03	Converting buildings into 125 sqm of B1(b) lab space Excluded as building conversion
Building conversion	Unit 5, Friendship Mill, Whalley Road, Read	0.011	0.03	Converting buildings into 116 sqm of B1(a)/B8 office/storage space Excluded as building conversion

Category	Address	Original Size, ha	Revised Size, ha	Comment
Building extension	Bolton Fold Farm, Alston Lane, Alston	0.009	0.02	Minor building remodelling/extension to an existing B1(c) farm building, delivering only 97 sqm of additional floorspace This will require 0.02 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Change of use/ building extension	Tom Croft, Back Lowergate, Clitheroe	0.007	0.02	Minor building extension to an existing B8 warehouse, delivering only 72 sqm of additional floorspace This will require 0.02 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Employment site	Mill Farm, Preston Road, Longridge	0.007	0.02	74 sqm of B1(a) office floorspace is proposed This will require 0.02 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Building extension	Land to rear of 90 Berry Lane, Longridge	0.007	0.02	Minor building extension to link to existing B1(c) industrial buildings, delivering only 75 sqm of additional floorspace This will require 0.02 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Building conversion	Ashwood, Brockhall Village, Old Langho	0.008	0.02	Converting buildings into 84 sqm of B1(a) office space Excluded as building conversion
Employment site	Fairfield Business Park, Longsight Road, Clayton-Le-Dale	0.004	0.01	40 sqm of B1(c)/B8 industrial/warehouse floorspace is proposed This will require 0.01 ha at a development density of 3,900 sqm/ha Below 0.25 ha threshold Excluded
Building extension	Building 201, Samlesbury Aerodrome, Myerscough Road, Balderstone	0.003	0.007	Minor building remodelling/extension to existing B2 unit, delivering only 26 sqm of additional floorspace This will require 0.007 ha at a development density of 3,900 sqm/ha

Category	Address	Original Size, ha	Revised Size, ha	Comment
				Below 0.25 ha threshold Excluded

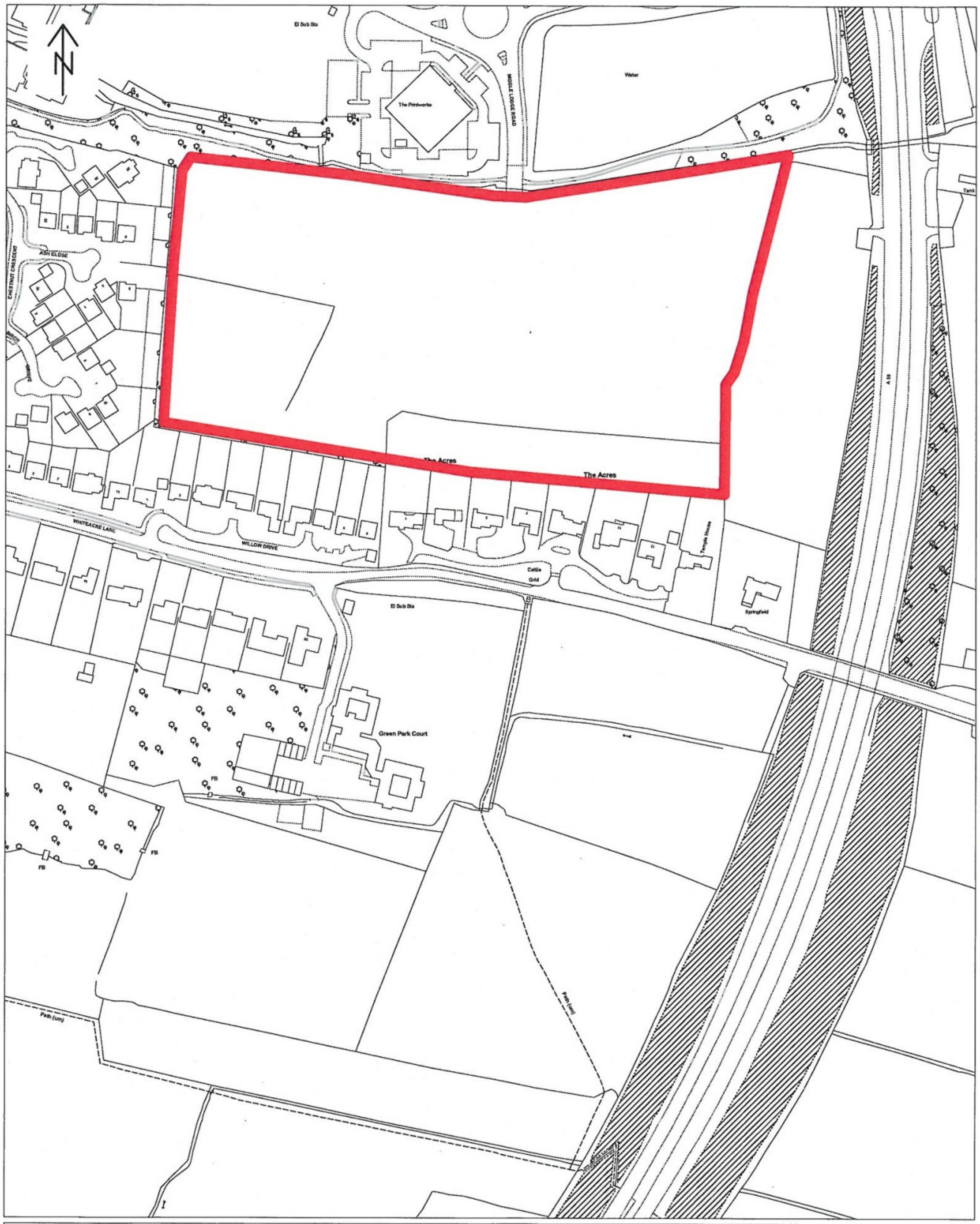
Source: BE Group/RVBC, 2013

** The Papillion Site (1), Barrow Brook Business Park, Barrow (1 ha) was not included in Council Monitoring, but remains an available employment site in Ribble Valley. It is therefore included in the baseline land supply*.

Appendix 4 – Employment Site Proformas

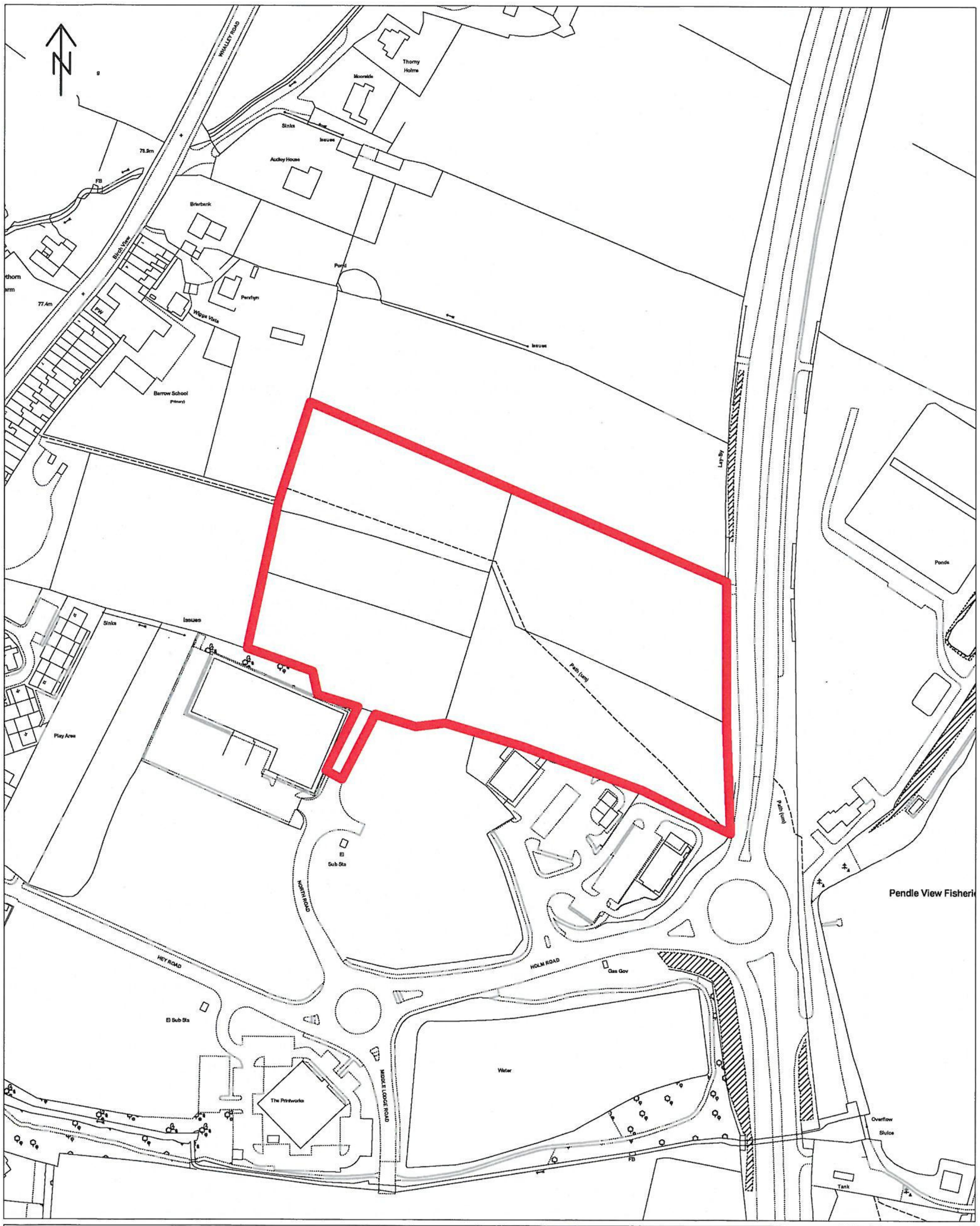
Please note double-sided printing used therefore:
odd numbered pages = site description
even numbered pages = corresponding map

Site Name	Papillion Site (2), Barrow Brook Business Park, Barrow	
Owner	Former owner (Papillion Properties) is now in receivership	
Agent(s)	Taylor Weaver	
Size, ha	4.32	
Market Availability	Not available	
Planning	A previous full planning permission for 8,746 sqm of B1(a) office floorspace (2007/0964) has now lapsed. 2012/0158 – Outline permission for 104 dwellings (allowed at appeal).	
Proposal	Land will be developed for housing. Sale of the land to a (confidential) housebuilder is underway	
Constraints	Trees on site	
Comments	It is assumed the site will shortly be lost from Ribble Valley's employment land supply.	
Likely Development Potential	Industrial/office	
Potential ODPM ELR guidance market segment uses	Established or Potential Office Locations High Quality Business Parks	Incubator/SME Cluster Sites Sites for Specific Occupiers
Serviced	No	
Availability, years	0-1	



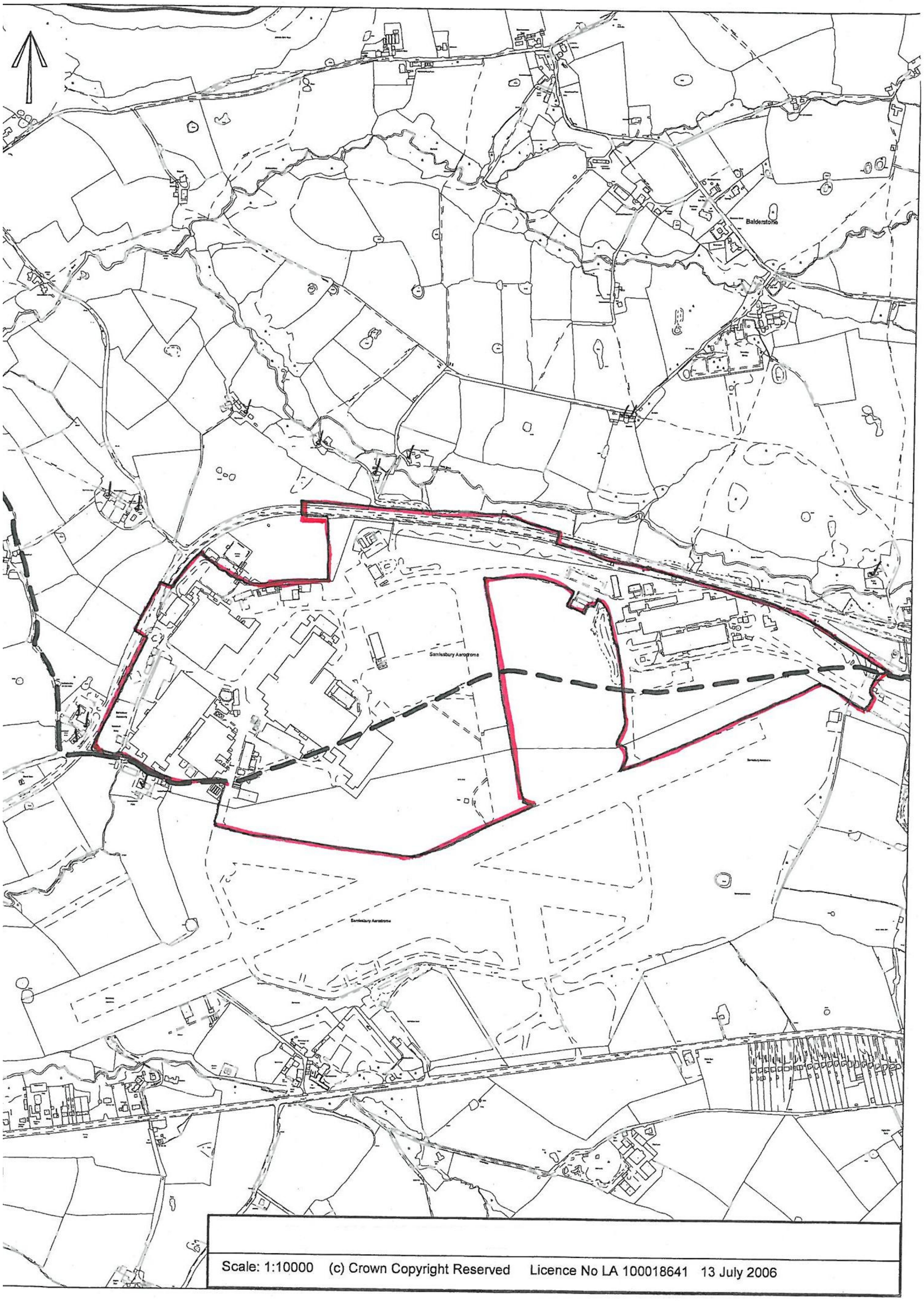
Scale 1:2500   15 May 2013

<table>
<tr><td>Site Name</td><td colspan="2">Land North of Barrow Brook Business Village, Barrow</td></tr>
<tr><td>Owner</td><td colspan="2">Admiral Taverns</td></tr>
<tr><td>Agent(s)</td><td colspan="2">Caldecotte Consultants</td></tr>
<tr><td>Size, ha</td><td colspan="2">3.33</td></tr>
<tr><td>Market Availability</td><td colspan="2">Not available</td></tr>
<tr><td>Planning</td><td colspan="2">2012/0739 – Outline planning permission for 12,975 sqm of B1/B2/B8 office/industrial floorspace</td></tr>
<tr><td>Proposal</td><td colspan="2">The owner is now considering next steps, which may include a sale to, or joint venture with, a developer
The owner has aspirations for housing on land to the west, fronting Whalley Road, and may wish further housing developed on the site</td></tr>
<tr><td>Constraints</td><td colspan="2">A public footpath crosses the northern edge of the site
Trees on site
Ransom strip</td></tr>
<tr><td>Comments</td><td colspan="2">Competes with an additional application by Newclose Properties for B1, B2, B8 uses, on the same land. Newclose hold a ransom strip which is required to connect this land with the existing business park</td></tr>
<tr><td>Likely Development Potential</td><td colspan="2">Industrial/office</td></tr>
<tr><td>Potential ODPM ELR guidance market segment uses</td><td>Established or Potential Office Locations
High Quality Business Parks</td><td>Incubator/SME Cluster Sites
Sites for Specific Occupiers</td></tr>
<tr><td>Serviced</td><td colspan="2">No</td></tr>
<tr><td>Availability, years</td><td colspan="2">1-3</td></tr>
</table>



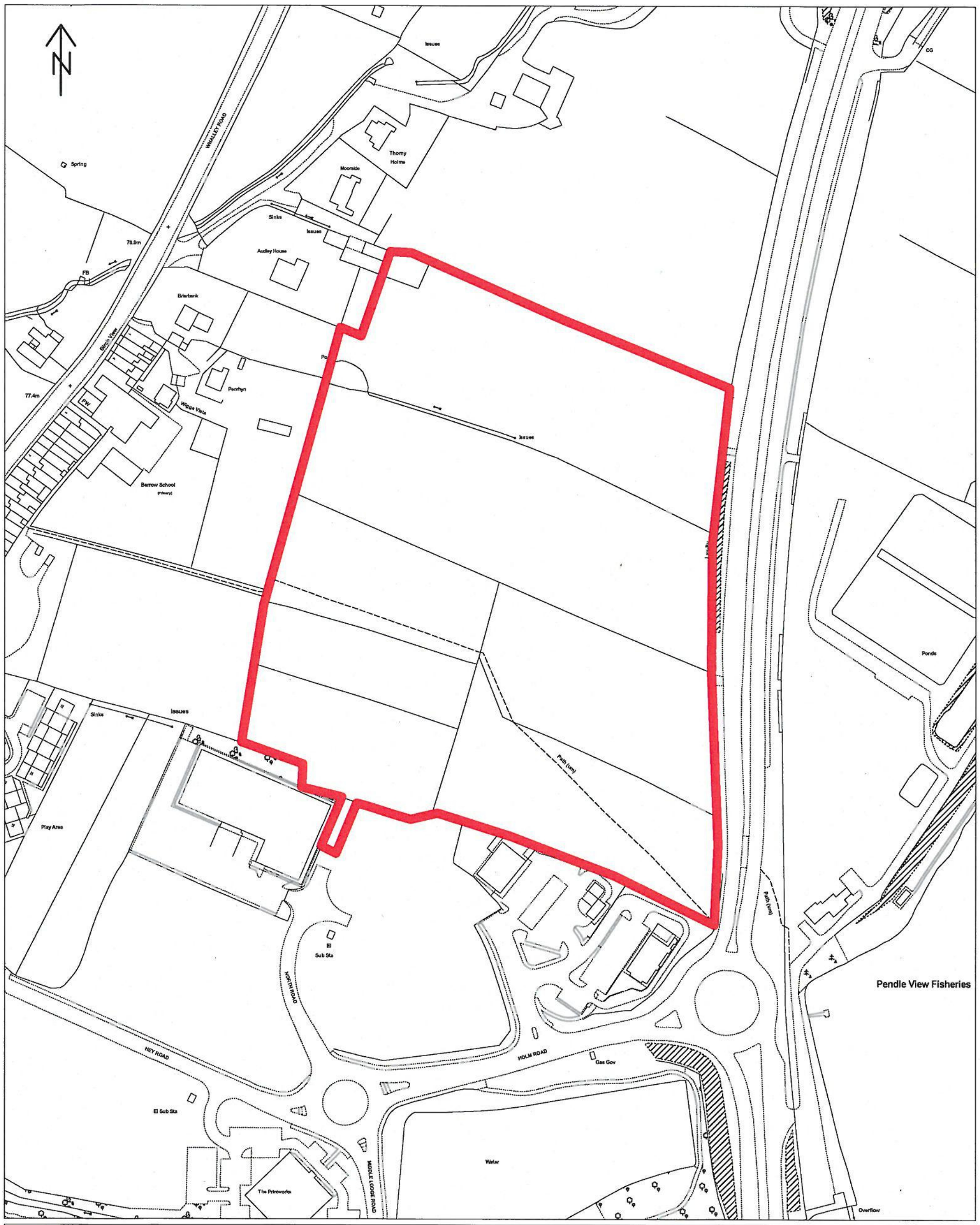
Scale 1:2500   17 April 2013

Site Name	BAE Systems, Samlesbury Aerodrome, Myerscough Road, Balderstone	
Owner	BAE Systems	
Agent(s)	GVA Grimley	
Size, ha	2.69	
Market Availability	Not available	
Planning	2006/0583 – Outline permission for 10,489 sqm of B1(a) office and B2 industrial premises	
Proposal	Development of these premises, for BAE's own use, has now been completed	
Constraints	None	
Comments	Within the secure BAE site, but not related to the Enterprise Zone	
Likely Development Potential	Industrial/office	
Potential ODPM ELR guidance market segment uses	Sites for Specific Occupiers	
Serviced	Yes	
Availability, years	0-1	



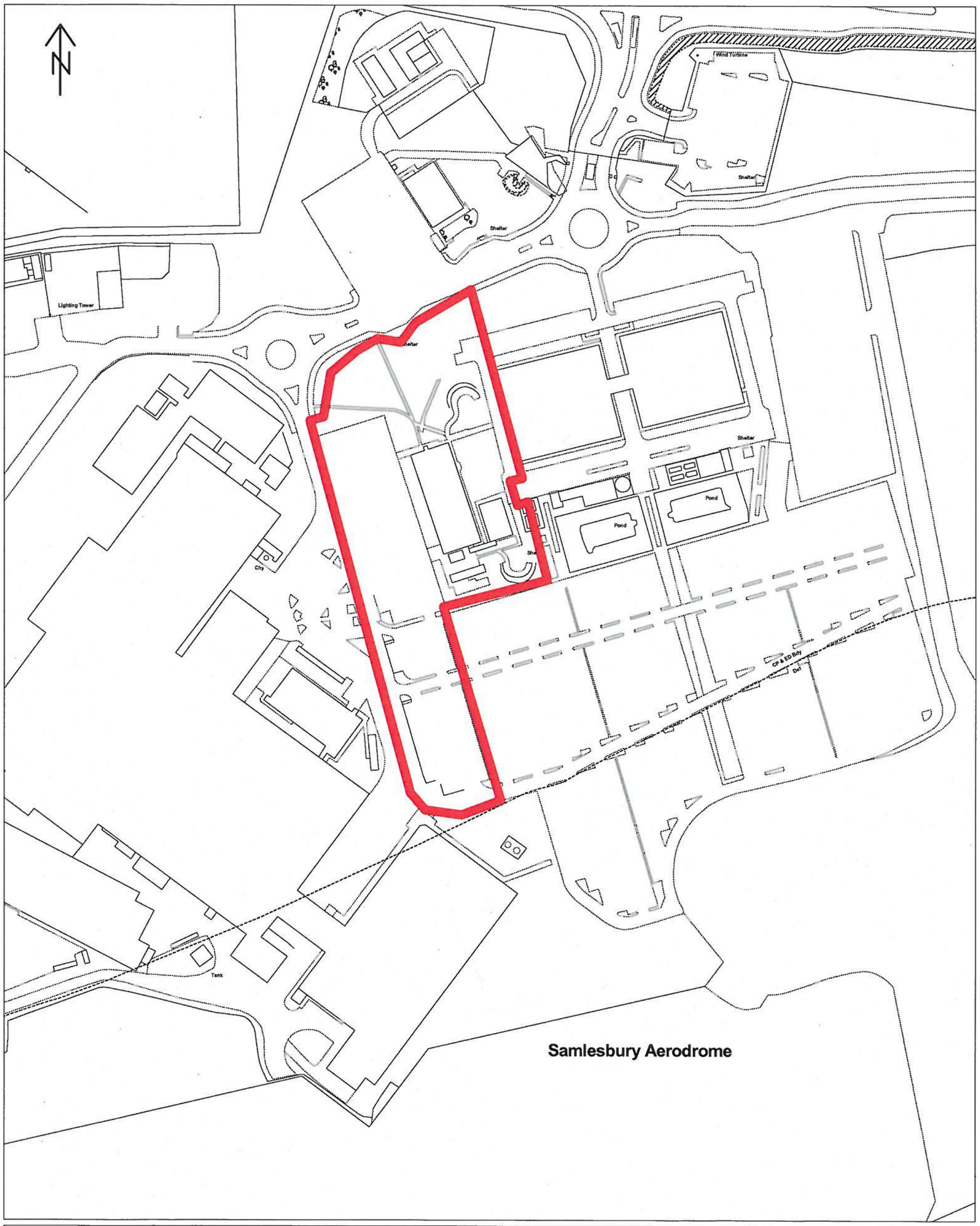
Scale: 1:10000 (c) Crown Copyright Reserved Licence No LA 100018641 13 July 2006

Site Name	Land off Hey Road, Barrow Brook Business Village, Barrow	
Owner	Newclose Properties and Athertons	
Agent(s)	Avalon Town Planning	
Size, ha	2.43	
Market Availability	Not available	
Planning	2012/0346 – Outline planning permission for B1/B2/B8 office/industrial floorspace	
Proposal	B1/B2/B8 office/industrial development	
Constraints	A public footpath crosses the site, trees on site	
Comments	Competes with an additional application by Admiral Taverns for 12,975 sqm of B1, B2, B8 uses, on the same land	
Likely Development Potential	Industrial/office	
Potential ODPM ELR guidance market segment uses	Established or Potential Office Locations High Quality Business Parks	Incubator/SME Cluster Sites Sites for Specific Occupiers
Serviced	No	
Availability, years	1-3	



Scale 1:2500 17 April 2013

Site Name	Building 611, Samlesbury Aerodrome, Myerscough Road, Balderstone	
Owner	BAE Systems	
Agent(s)	GVA Grimley	
Size, ha	2.38	
Market Availability	Not available	
Planning	2009/0432– Full permission for a 9,300 sqm B1(a) office building	
Proposal	Development of these premises, for BAE's own use, has now been completed	
Constraints	None	
Comments	Within the secure BAE site, but not related to the Enterprise Zone	
Likely Development Potential	Office	
Potential ODPM ELR guidance market segment uses	Sites for Specific Occupiers	
Serviced	Yes	
Availability, years	0-1	

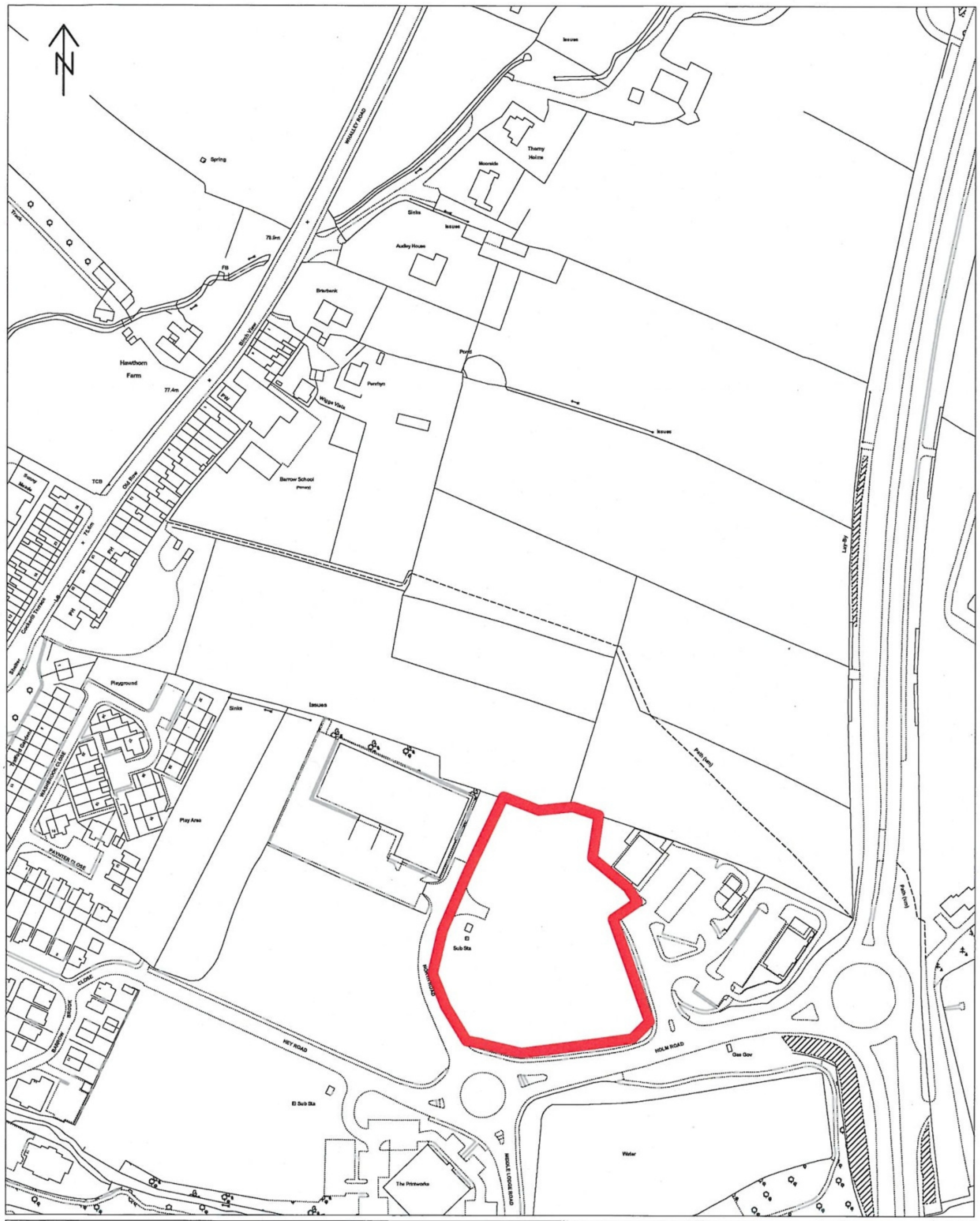


Scale 1:2500   17 April 2013

Site Name	Hindle and Schofield Site, Barrow Brook Business Park, Barrow	
Owner	Private individual	
Agent(s)	Lea, Hough and Co.	
Size, ha	1.19	
Market Availability	On the market for offices, available as managed suites or long leaseholds, of 93-2,044 sqm	
Planning	Previous planning permission for 2,271 sqm of B1(a) offices(2007/1065) has now lapsed	
Proposal	The owner lacks the finance to develop the above office scheme speculatively. Has considered a mixed-use scheme, including housing, but has been unable to find a development partner	
Constraints	-	
Comments	Agent reports no interest in this land over the last five years The view of both the Owner and the agent view is that this site cannot be brought forward without an element of higher value uses to kick-start development.	
Likely Development Potential	Office	
Potential ODPM ELR guidance market segment uses	Established or Potential Office Locations High Quality Business Parks	Incubator/SME Cluster Sites Sites for Specific Occupiers
Serviced	No	
Availability, years	3-5	

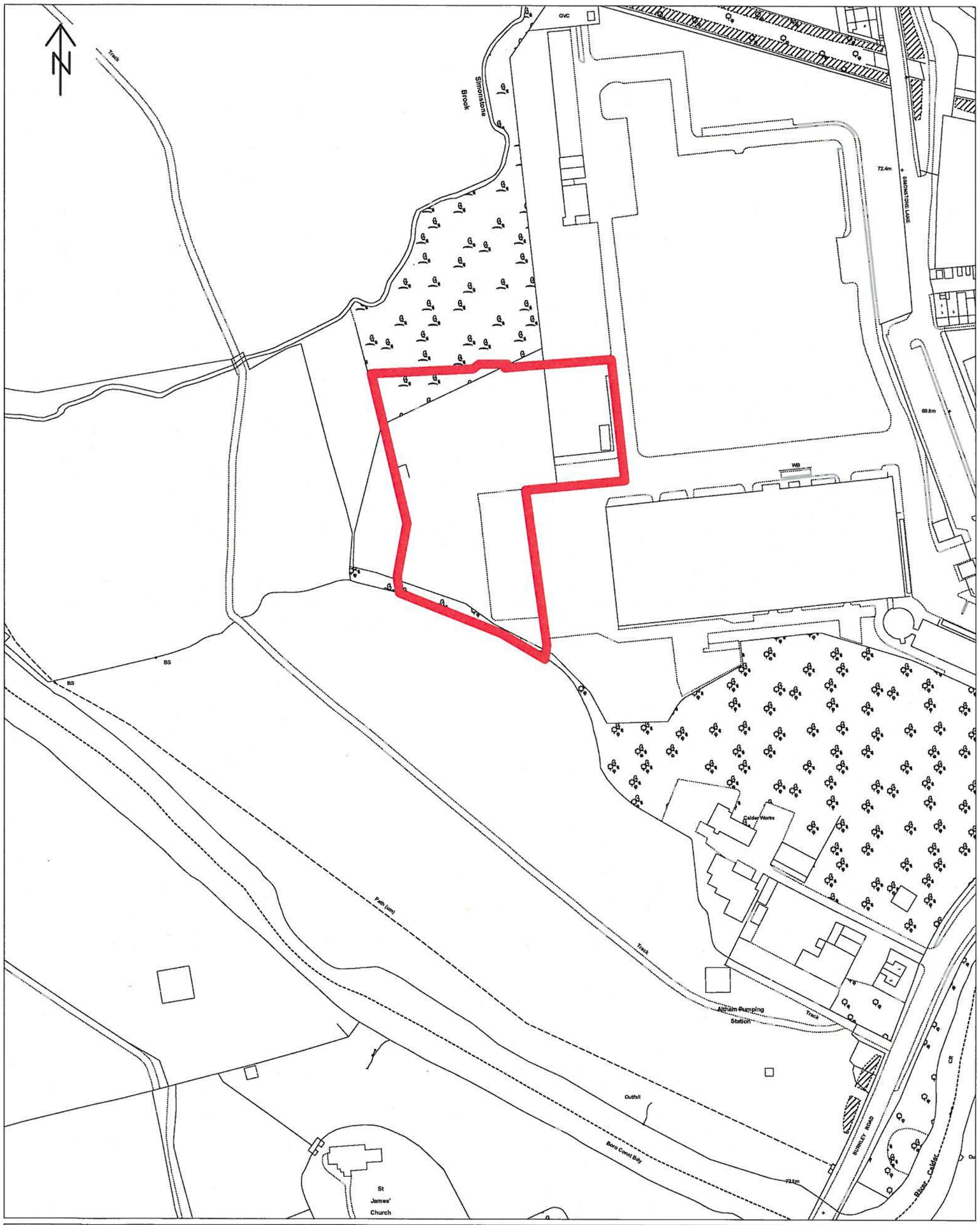
Scale 1:2500 17 April 2013

Site Name	Papillion Site (1), Barrow Brook Business Park, Barrow	
Owner	Former owner (Papillion Properties) is now in receivership	
Agent(s)	Taylor Weaver	
Size, ha	1.00	
Market Availability	On the market, for a freehold sale, as a commercial development site.	
Planning	A previous full planning permission for B1/B2/B8 floorspace has now lapsed.	
Proposal	Marketed as suitable for a range of uses, subject to planning, including offices, health care, child care, hotel, restaurant and leisure. The land is available as a single development site or as plots of 0.2 ha or more.	
Constraints	-	
Comments	-	
Likely Development Potential	Industrial/office	
Potential ODPM ELR guidance market segment uses	Established or Potential Office Locations High Quality Business Parks	Incubator/SME Cluster Sites Sites for Specific Occupiers
Serviced	No	
Availability, years	1-3	



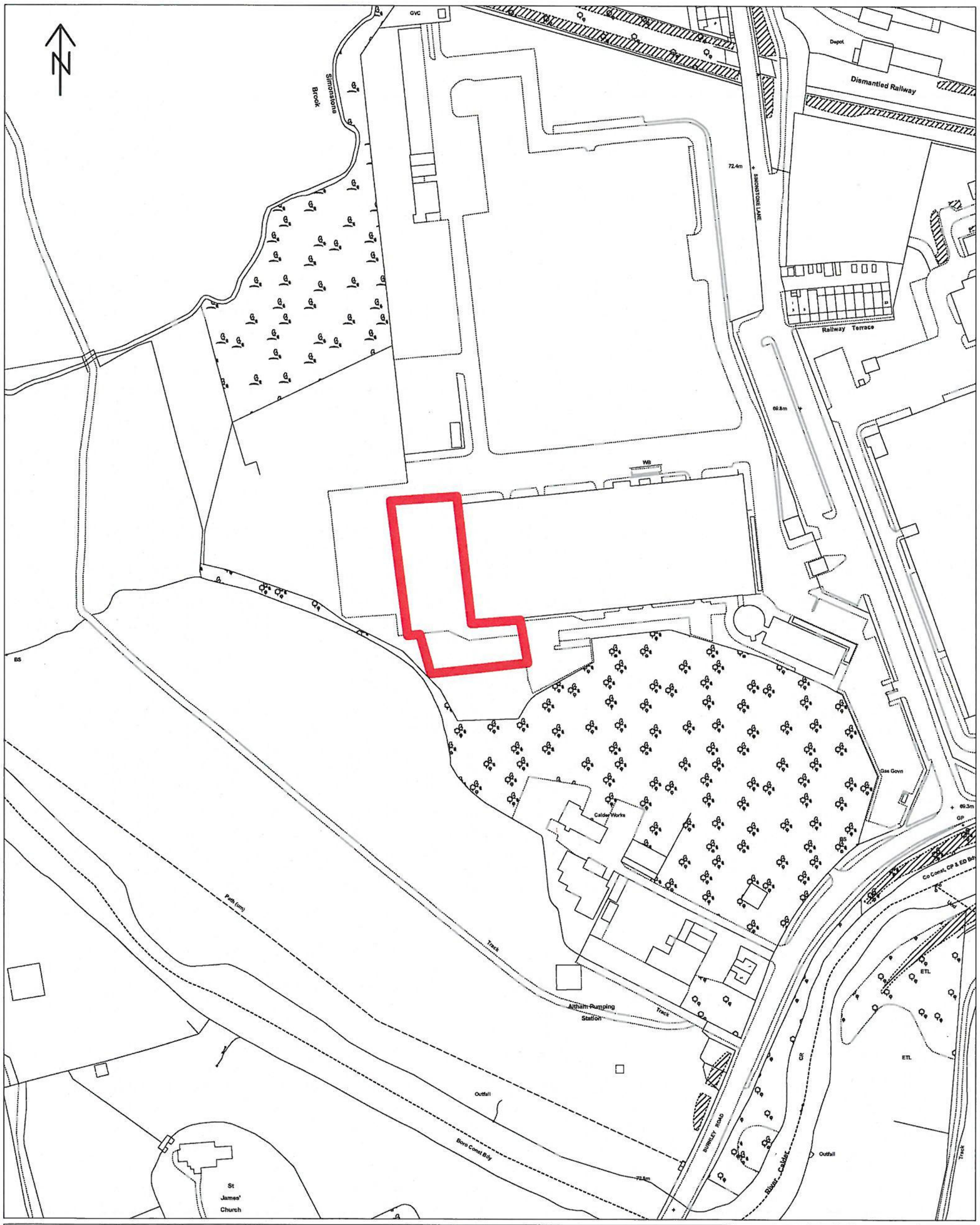
Scale 1:2500   15 May 2013

Site Name	Casting Foundry Site, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	
Owner	Fort Vale Engineering	
Agent(s)	JWPC	
Size, ha	0.87	
Market Availability	Not available	
Planning	2011/0537 – Full planning permission for 3,412 sqm B2 Investment Casting Foundry	
Proposal	Fort Vale expect that development of this Casting Foundry, for Fort Vale's own use, will commence after completion of the extension to Building S (discussed below).	
Constraints	-	
Comments	-	
Likely Development Potential	Industrial	
Potential ODPM ELR guidance market segment uses	Sites for Specific Occupiers	
Serviced	Yes	
Availability, years	0-1	



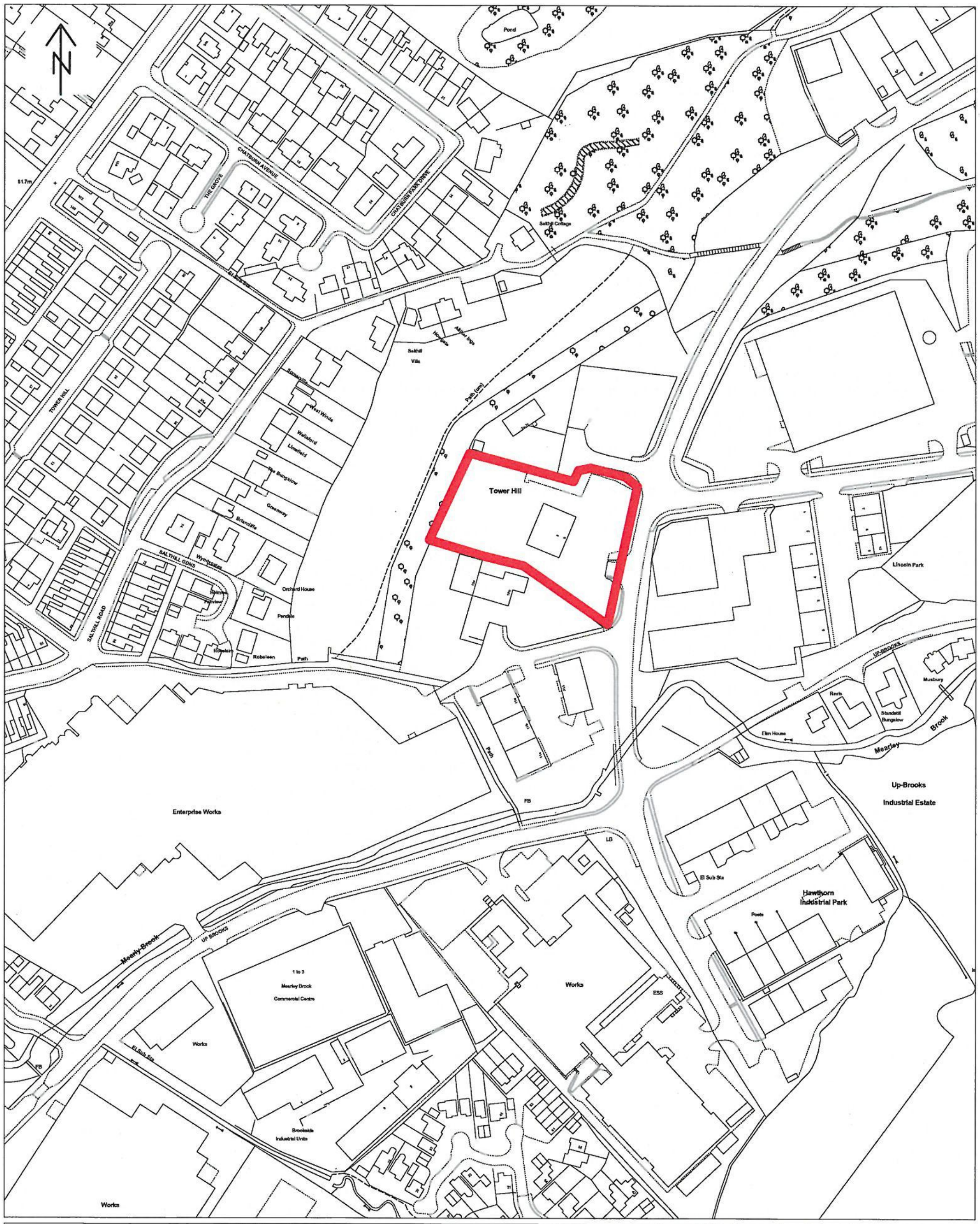
Scale 1:2500 17 April 2013

Site Name	Rear of Building S, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	
Owner	Fort Vale Engineering	
Agent(s)	JWPC	
Size, ha	0.50	
Market Availability	Not available	
Planning	2011/0222 – Full planning permission for a 1,951 sqm B1(c)/ B2 extension to an existing building (Building 'S')	
Proposal	Fort Vale expect that development of this extension, for Fort Vale's own use, will commence within 4 months	
Constraints	-	
Comments	-	
Likely Development Potential	Industrial	
Potential ODPM ELR guidance market segment uses	Sites for Specific Occupiers	
Serviced	Yes	
Availability, years	0-1	



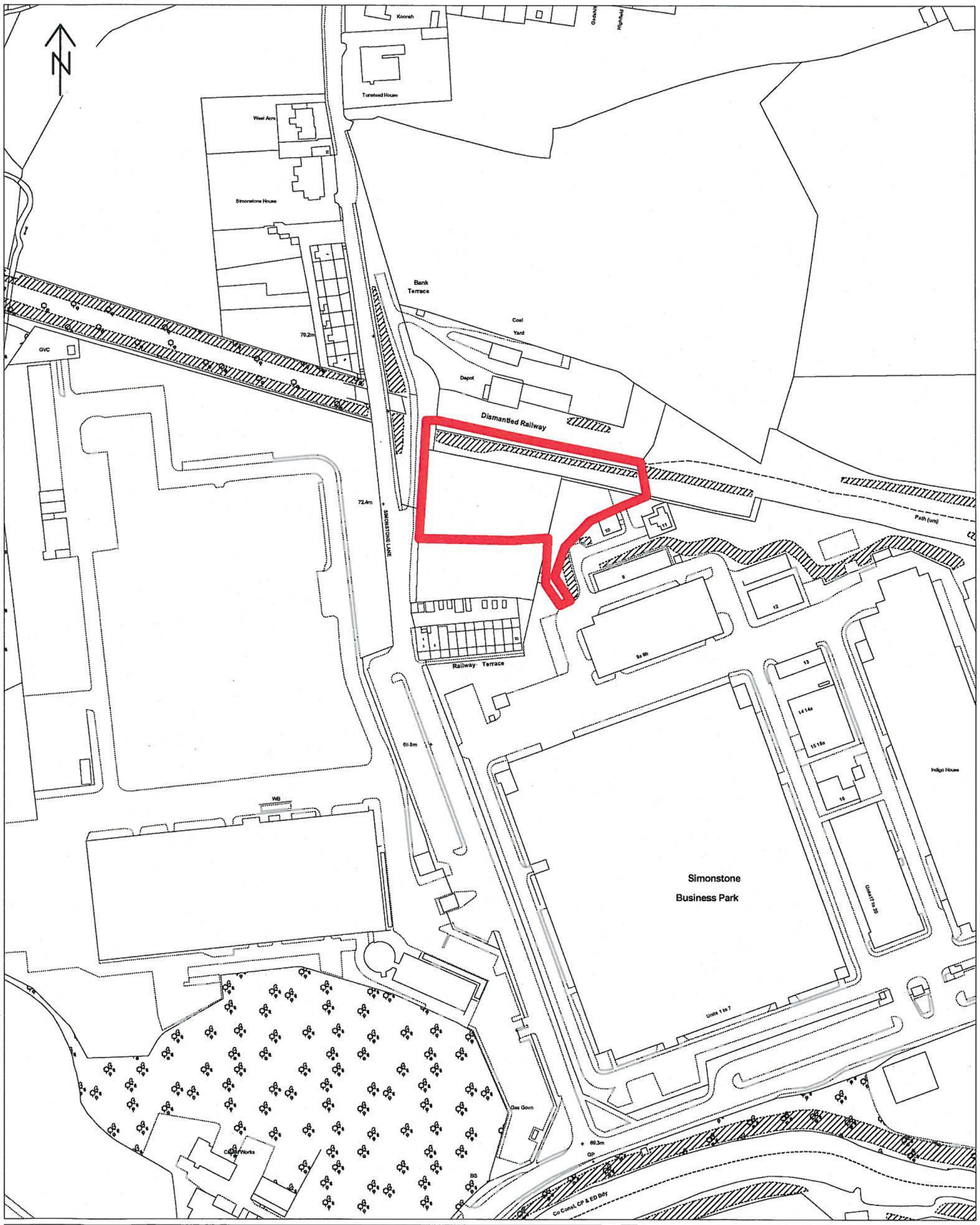
Scale 1:2500 17 April 2013

Site Name	Land at Salthill Industrial Estate, Lincoln Way, Clitheroe	
Owner	Jacksons Haulage	
Agent(s)	Petty Chartered Surveyors	
Size, ha	0.46	
Market Availability	On the market, to let (or long leasehold), as Ajax Business Park. Offered as four trade counter units. One unit is let to date	
Planning	2010/0010 – Outline planning permission for 1,508 sqm of B1(c)/B8 industrial/trade floorspace 2011/1075 – Full planning permission for a further 294 sqm of B8 trade floorspace	
Proposal	One unit will be retained for Jacksons Haulage's own use. A further four buildings, 300-900 sqm in size, will be delivered as design and build options.	
Constraints	-	
Comments	Presently an active haulage yard with a 470 sqm B8 warehouse on the site.	
Likely Development Potential	Industrial	
Potential ODPM ELR guidance market segment uses	General Industrial/Business Areas	Sites for Specific Occupiers
Serviced	Yes	
Availability, years	1-3	



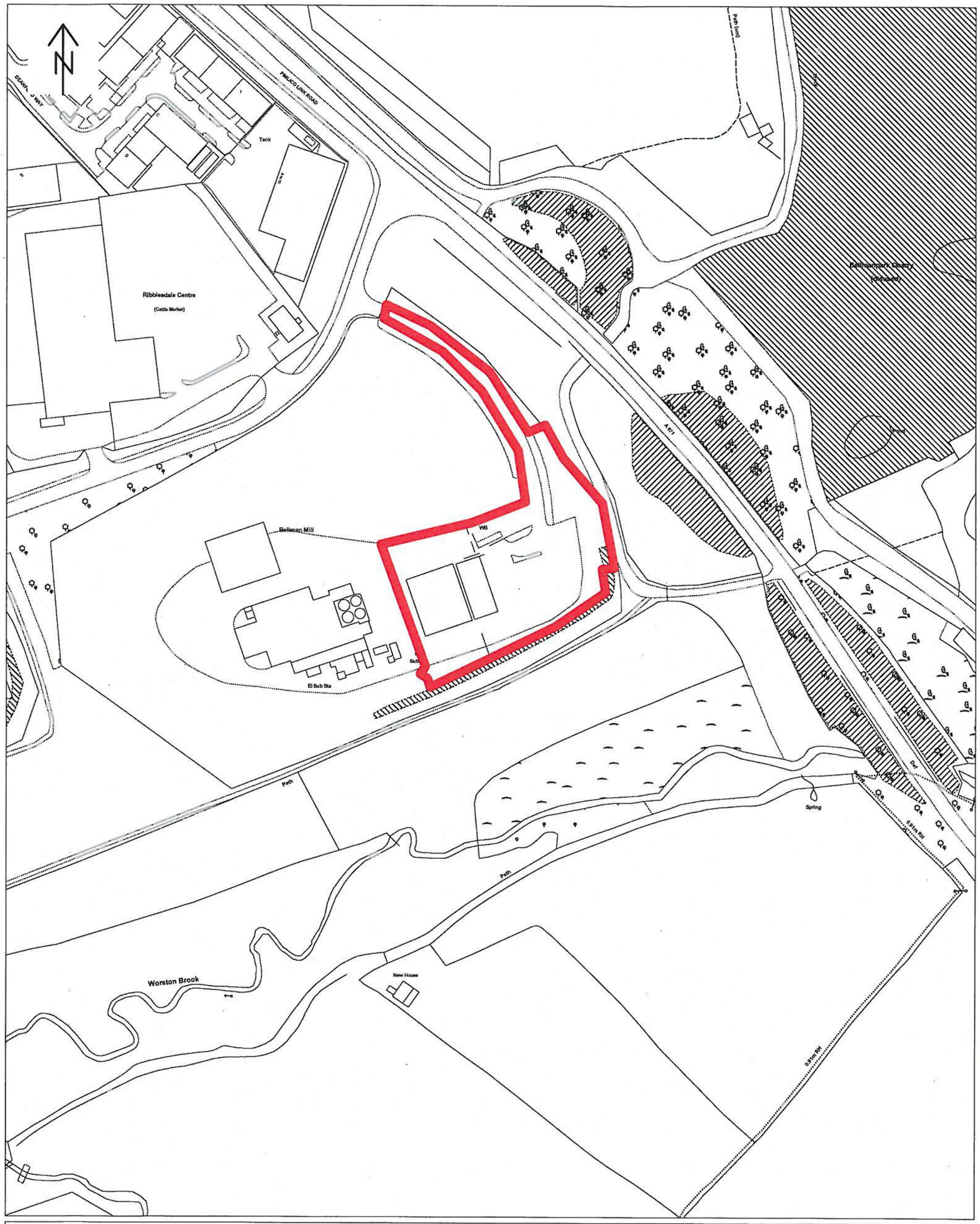
Scale 1:2500 17 April 2013

Site Name	Land Adj. to Simonstone Lane, Time Technology Park, Simonstone	
Owner	GET	
Agent(s)	Wheatley, Springs, Baron	
Size, ha	0.45	
Market Availability	Not available	
Planning	Previous outline permission 1,769 sqm of office and industrial floorspace (2008/0284) has now lapsed	
Proposal	Landowner retains a general aspiration to develop this site	
Constraints	Buildings and former rail line on site	
Comments	Adjacent to former coal yard and housing	
Likely Development Potential	Industrial/office	
Potential ODPM ELR guidance market segment uses	Established or Potential Office Locations High Quality Business Parks Research and Technology/Science Parks	General Industrial/Business Areas Incubator/SME Cluster Sites Sites for Specific Occupiers
Serviced	No	
Availability, years	5+	



Scale 1:2500   17 April 2013

Site Name	B Dugdale and Son, Bellman Mill, Salthill, Clitheroe	
Owner	B Dugdale and Son (Dugdale Nutrition)	
Agent(s)	Trevor Dawson	
Size, ha	0.38	
Market Availability	Not available (although 121 sqm of space in the completed office building is on the market, to let).	
Planning	2007/0619 – Full planning permission to demolish existing offices and develop a new office, plus seven B1(c) light industrial units (1,476 sqm in total)	
Proposal	The office building, which includes space for Dugdale Nutrition, is now complete. The industrial units will be developed as a separate phase	
Constraints	Site includes existing buildings and hardstanding within the Dugdale Nutrition facility, trees onsite	
Comments	A further five industrial units are also being considered, on a site presently occupied by a pet food warehouse	
Likely Development Potential	Industrial/office	
Potential ODPM ELR guidance market segment uses	Established or Potential Office Locations General Industrial/Business Areas	Incubator/SME Cluster Sites Sites for Specific Occupiers
Serviced	Yes	
Availability, years	1-3	



Scale 1:2500 17 April 2013

Appendix 5 – Site Scoring System

Site Location and Access	Proximity to strategic highway network	• Site adjacent to primary route A59/A671/A666 junction – score 10 • Site 0.5 km from primary route A59/A671/A666 junction – score 9 • Site 1.0 km from primary route A59/A671/A666 junction – score 8 • For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary route A59/A671/A666 junction scores zero.
	Proximity to motorway network	Proximity to motorway network (M6/M65): • Site within 1.0 km from M6/M65 motorway junction – score 10 • Site within 5.0 km from M6/M65 motorway junction – score 6 • Site within 10.0 km from M6/M65 motorway junction – score 3 • Site more than 10.0 km from M6/M65 motorway junction – score 0.
	Prominence	• Site adjacent to, and visible from A59/A671/A666 – score 10/9 • Site adjacent to, and visible from other dual carriageway – score 8/7 • Site adjacent to, and visible from other A road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
Planning Status		• If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	• If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0

Continued overleaf….

<table>
<tr><th></th><th></th><th></th></tr>
<tr><td rowspan="3"></td><td>Constraints</td><td>May be physical (including access). planning, or legal
Reduce score by 2 for each constraint
If there are none – score 10</td></tr>
<tr><td>Environmental Setting</td><td>Subjective, score 0 to 10, examples:
• Good quality business park/greenfield location – score 10
• Moderate quality industrial estate – score 5
• Poor quality industrial estate/in-fill location – score 2</td></tr>
<tr><td>Flexibility</td><td>Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers
Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.</td></tr>
<tr><td colspan="2">Site availability</td><td>• Site available to develop within 0-1 year – score 10
• Site available to develop within 1-3 years – score 6
• Site available to develop 3-5 years – score 3
• Site available to develop 5+ years – score 0</td></tr>
</table>

Appendix 6 – site scoring

Site Name	Type	Size (ha)	Site Location and Access				Planning Status	Site Conditions				Site availability	Total	Market -led Sub-total	Likely Use	Constraints
			Road Proximity	Motorway Proximity	Prominence	Public Transport		Services Availability	Constraints	Environmental Setting	Flexibility					
BAE Systems, Samlesbury Aerodrome, Myerscough Road, Balderstone	Brownfield	2.69	10	6	10	5	10	10	10	8	10	10	89	44	Industrial/office	None
Building 611, Samlesbury Aerodrome, Myerscough Road, Balderstone	Brownfield	2.38	10	6	10	5	10	10	10	8	9	10	88	43	Office	None
Papillion Site (2), Barrow Brook Business Park, Barrow	Greenfield	4.32	10	3	10	5	8	7	6	10	10	10	79	43	Industrial/office	Trees on site, non-employment aspirations
Casting Foundry Site, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	Brownfield	0.87	6	6	5	5	10	10	10	8	6	10	76	31	Industrial	None
Rear of Building S, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone	Brownfield	0.50	6	6	6	5	10	10	10	8	5	10	76	31	Industrial	None
Land off Hey Road, Barrow Brook Business Village, Barrow	Brownfield	2.43	10	3	10	5	8	7	6	10	10	6	75	43	Industrial/office	A public footpath crosses the site, trees on site
Papillion Site (1), Barrow Brook Business Park, Barrow	Brownfield	1.00	10	3	10	5	4	7	10	10	10	6	75	43	Industrial/office	None
Land North of Barrow Brook Business Village, Barrow	Greenfield	3.33	10	3	10	5	8	7	4	10	10	6	73	43	Industrial/office	A public footpath crosses the northern edge of the site, trees on site, ransom strip
Hindle and Schofield Site, Barrow Brook Business Park, Barrow	Brownfield	1.19	10	3	10	5	4	7	8	10	8	3	68	41	Office	None

Land at Salthill Industrial Estate, Lincoln Way, Clitheroe	Brownfield	0.46	8	0	4	10	10	10	8	6	5	6	67	23	Industrial	Presently an active haulage yard with a 470 sqm B8 warehouse on the site
B Dugdale and Son, Bellman Mill, Salthill, Clitheroe	Brownfield	0.38	10	0	9	5	10	10	4	4	3	6	61	26	Industrial/office	Site includes existing buildings and hardstanding within the Dugdale Nutrition facility, trees onsite
Land Adj. to Simonstone Lane, Time Technology Park, Simonstone	Brownfield	0.45	6	6	5	5	4	7	6	6	5	0	50	28	Industrial/office	Buildings and former rail line on site

Ribble Valley Borough Business Survey 2013

Company Details

Company Name	
Contact Name	
Position	
Address	
Email Address	
Tel No	
Business Activity	

Employees

1. Number of: **full-time** employees ___________ and/or **part-time** employees ___________

2. Did your business start up in your present location?

Yes ☐ If **Yes**, what year was the business registered? _________________

No ☐ If **No**, what year did you relocate to Ribble Valley? _________________

And (*if no*) where were you previously located? _________________

3. How do you expect your business to grow within the next 0-5 years?

Moderate growth	☐	Significant growth	☐	Closure	☐
Same	☐	Reduced operation	☐		

Current Accommodation

4. Type of accommodation (please tick main type/use)

Office	☐	Serviced office	☐
Industrial	☐	Warehouse	☐
High-tech/lab	☐	Barn conversion/Farm location	☐
Site (undeveloped land)	☐		

5. Is the property:

Owned	☐	Rented	☐

6. Size of unit:

0-100 sqm *(0-1076 sqft)*	☐	101-200 sqm *(1077-2152 sqft)*	☐	201-500 sqm *(2153-5382 sqft)*	☐
501-1000 sqm *(5383-10,764 sqft)*	☐	1001-2000 sqm *(10,765-21,529 sqft)*	☐	2001-5000 sqm *(21,530-53,821 sqft)*	☐

Larger, sqm ______________________________________

Site size, hectares/acres ______________________________________

7. How satisfied are you with your current accommodation?

Very satisfied	☐	Satisfied	☐
Unsatisfied	☐	Very unsatisfied	☐

8. If you are unsatisfied or very unsatisfied, please state your reasons.

____

____

Future Accommodation

9. Are you considering moving premises within the next:

12 months?	Yes	☐	No	☐	2-3 Years?	Yes	☐	No	☐

If yes to either of the above, please respond to questions 10a – 10i, otherwise go directly to question 11.

10a. What type of accommodation will you be looking for? (Please tick main type/use)

Office	☐	Industrial	☐	Serviced office	☐
Warehouse	☐	Site (undeveloped land)	☐	Barn conversion/Farm location	☐
High-tech/Lab	☐				

10b. Tenure required?

Freehold	☐	Leasehold	☐	No Preference	☐

10c. Quality of premises preferred?

Prestigious/New	☐	Moderate	☐
Basic/Budget	☐	No Preference	☐

10d. Will this be **additional** ☐ or **alternative** ☐ to existing property?

10e. What size of unit/site will you be looking for?

0-100 sqm *(0-1076 sqft)*	☐	101-200 sqm *(1077-2152 sqft)*	☐	201-500 sqm *(2153-5382 sqft)*	☐
501-1000 sqm *(5383-10,764 sqft)*	☐	1001-2000 sqm *(10,765-21,529 sqft)*	☐	2001-5000 sqm *(21,530-53,821 sqft)*	☐

Larger, sqm ____

Site size, hectares/acres ____

10f. General location – please indicate preferred areas(s) below:

Clitheroe	☐	Longridge	☐	Whalley	☐
Barrow Brook Business Village	☐	Salthill	☐	M65 Corridor	☐
Anywhere in Ribble Valley	☐	Elsewhere in Lancashire	☐		

Other (please specify): ____

10g. Location type preferred:

Town Centre	☐	Industrial Estate	☐
Business Park	☐	Rural	☐

10h. What do you consider to be the most important factor when seeking alternative accommodation? Please state below.

____

____

____

10i. Will the move result in additional jobs being created?

Yes ☐ No ☐

If yes, how many? ___________________

Additional Comments

11. If you have any additional comments affecting your choice of premises please use the space below. Topics might include:

- **Road Infrastructure** **Public Transport** **Staff Availability/Skills**
- **Business Support** **Broadband Provision** **Property Availability**

____

____

____

____

Please indicate if you are happy to be contacted for further research YES / NO

Thank you for your assistance.
All responses will be treated in confidence.
If you would like any further information on this survey please contact Christopher Wilson at

BE Group on 01925 822112.

Please return the questionnaire by the 15th March 2013 using the enclosed pre-paid reply envelope or fax back to 01925 822113. If you prefer, you can complete an online version of this questionnaire by visiting: www.begroup.uk.com

Appendix 8 – Economic Forecast Models Detailed Calculations

Policy Off

Model 2 – Employment Based Forecast 2012-2028

Sector/Jobs	Workforce Growth	Workforce Proportion (%) Occupying B1/2/8 Space	Net Number of Jobs	Floorspace per job, sqm	Floorspace Required, sqm
Distribution	1,000	48	480	70	33,600
Financial & Insurance	100	100	100	12	1,200
Information & Communications	100	100	100	12	1,200
Administrative & Support Services	500	100	500	12	6,000
Professional Services	300	100	300	12	3,600
Other Business Services	100	100	100	12	1,200
Total Floorspace sqm					**46,800**
Divided by Development Floorspace per ha					**3,900**
Equivalent Employment Land Needed ha					**12.00**

Source: BE Group 2013

Sector/Jobs	Workforce Losses	Workforce Proportion (%) Occupying B1/2/8 Space	Net Number of Jobs	Floorspace per job, sqm	Floorspace Reduction, sqm
Manufacturing	1,400	100	1,400	36-47	50,400-65,800
Public Administration	100	22	22	12	264
Total Floorspace sqm					**50,664-66,064**
Divided by Development Floorspace per ha					**3,900**
Equivalent Employment Land Reduction ha					**12.99-16.94**

Source: BE Group 2013

Therefore employment land requirement:

- From growth 12.00 ha
- From losses -12.99 to -16.94 ha
- Total needed -0.99 to -4.94 ha

Policy Off

Model 3 – Population Based Forecast 2012-2028

Oxford Economics' projections suggest an increase of 2,000 to the level of the working population between 2012 and 2028 (rising from 33,000 to 35,000). This takes no account of planned changes to retirement ages, and thus presents a probably worst case position. Nevertheless Oxford Economics are forecasting a slight increase in the resident employment rate, from 83 percent in 2012 to 84 percent in 2028. The consequence of this is a further 1,600 residents projected to be working by 2028.

The following calculation shows the percentage split of employment by all business sectors at 2028, applied to the 1,600 figure. Where relevant, job:floorspace density rates (Employment Densities Guide 2nd Edition 2010) and the proportion of people in each industry sector that occupy B Use Class space (The Use of Business Space, South East Region Planning Conference) have been applied.

Sector/Jobs	Sector Proportion of Total Workforce, percent	Workforce Increase	Workforce Proportion Occupying B1/2/8 space	Floorspace per job, sqm	Floorspace Increase, sqm
Agriculture	2.22	35	5	12	21
Manufacturing	15.79	252	100	36-47	9,072-11,844
Utilities	0.55	9	5	12	-
Construction	4.99	80	26	12	252
Wholesale & Retailing	29.36	470	-	-	-
Transportation & Storage	2.22	35	48	70	1,190
Hotels and Catering	10.53	168	-	-	-
Information & Communications	1.66	27	100	12	324
Finance & Insurance	0.83	13	100	12	156
Real Estate	0.83	13	-	-	-
Professional, Scientific & Technical Services	4.43	71	100	12	852
Administrative & Support Services	4.71	75	100	12	900
Public Administration	1.94	31	7	12	84
Education	6.09	97	-	-	-

Sector/Jobs	Sector Proportion of Total Workforce, percent	Workforce Increase	Workforce Proportion Occupying B1/2/8 space	Floorspace per job, sqm	Floorspace Increase, sqm
Health & Social Work	10.25	164	-	-	-
Arts, Entertainment & Research	1.39	19	-	-	-
Other Services	2.22	35	100	12	420
Total Floorspace sqm					**13,271-16,043**
Divided by Development Floorspace per ha					**3,900**
Equivalent Employment Land Needed ha					**3.58-4.29**

Source: BE Group 2013

Therefore employment land provision required would be between 3.40 and 4.11ha. This is substantially less than the current available supply.

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Model 4 – Employment Based Forecast 2012 – 2028

Sector/Jobs	Workforce Growth	Workforce Proportion Occupying B1/2/8 Space	Net Number of Jobs	Floorspace per job, sqm	Floorspace Required, sqm
Manufacturing	600	100	600	36-47	21,600-28,200
Distribution	1,500	48	720	70	50,400
Transport and Communications	100	48	48	70	3,360
Information & Communication	100	100	100	12	1,200
Professional, Scientific, Technical Services	300	100	300	12	3,600
Administration & Support Services	600	100	600	12	7,200
Financial & Insurance	100	100	100	12	1,200
Other Business Services	100	100	300	12	1,200
Total Floorspace					**89,760-96,360**
Divided by Development Floorspace per ha					**3,900**
Equivalent Employment Land Needed, ha					**23.02-24.71**

Source: BE Group 2013

Sector/Jobs	Workforce Losses	Workforce Proportion Occupying B1/2/8 Space	Net Number of Jobs	Floorspace per job, sqm	Floorspace Reduction, sqm
Public Administration	100	22	22	12	264
					264
Divided by Development Floorspace per ha					**3,900**
Equivalent Employment Land Reduction, ha					**-0.07**

Source: BE Group 2013

Therefore employment land requirement:

- From Growth 23.02 to 24.71 ha
- From Losses -0.07 ha
- Total Needed 22.95 to 24.64 ha

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Model 5 – Population Based Forecast 2012 – 2028

Oxford Economics Population Forecast suggests an increase of 3,000 in the number of residents working by 2028. The following calculation shows the percentage split of employment by all business sectors, at 2028 applied to the 3,000 figure. Where relevant, job:floorspace density rates (Employment Densities Guide, 2nd Edition 2010) and the proportion of people in each industry sector that occupy B Use Class space (The Use of Business Space, SERPLAN), have been applied.

Sector/Jobs	Sector, Proportion of Total Workforce, percent	Workforce Growth	Workforce Proportion Occupying B1/2/8 Space	Floorspace per job, sqm	Floorspace Required, sqm
Agriculture	2.3	69	5	12	41
Manufacturing	19.5	585	100	36-47	21,060-27,495
Utilities	0.5	15	5	12	-
Construction	4.6	138	26	12	430
Wholesale	28.2	846	48	70	28,425
Transport	2.3	69	48	70	397
Accommodation & Food Services	10.4	312	-	-	-
Information & Communications	1.5	45	100	12	540
Financial & Insurance Services	0.8	24	100	12	288
Professional, Scientific, Technical Services	4.1	123	100	12	1,476
Administration & Support Services	4.5	135	100	12	1,620
Public Administration	1.8	54	22	12	144
Education	5.6	168	22	12	443
Health	9.4	282	-	-	-
Arts	1.3	39	-	-	-
Other Services	2.0	60	22	12	158
Real Estate Services	1.0	30	-	-	-
TOTAL	**100.0**	**3,000**	**n/a**	**n/a**	**55,002-61,437**

Source: BE Group 2013

Divided by 3,900 sqm per developable hectare, floorspace requirement equates to between 14.10 and 15.75 ha.

Appendix 9 – Developer Marketing Standards

Where a sites' or premises' owner is applying to a Local Authority for change of use from employment to an alternative use, they have to prove there is a lack of demand for that site or premises.

This table itemises the various marketing tools that should typically be used to market the interest.

Should these tools fail to identify potential purchasers or occupiers then it may be considered that there is a lack of employment demand for the site or premises in question.

Marketing Tool	Premises	Site, 0-5 acres	Site, 5+ acres
On-site Marketing Board in prominent position	✓	✓	✓
Local Property Agent	✓	✓	✓
Regional Property Agent (joint or sole)	✓		✓
Liaise with RVBC	✓	✓	✓
Produce Marketing Particulars (in hard copy/PDF)	✓	✓	✓
Targeted mailing to Local/Regional Property Agents (Internet)	✓	✓	✓
Targeted mailing to Local/Regional Property Developers/Investors (Internet)	✓	✓	✓
Targeted mailing to National Property Agents/Developer/Investors (Internet/postal)			✓
Targeted mailing to selected potential occupiers (large local companies) (Postal)	✓	✓	✓
Advertise in Regional Business Press		✓	✓

Marketing Tool	Premises	Site, 0-5 acres	Site, 5+ acres
Advertise in National Property Press			✓
Website	✓	✓	✓
Internet Mailing to Targeted Business Sectors (e-shot type mailing)	✓	✓	✓
Marketing Period, months	6-12	6-12	9-18