

# **Ribble Valley Economic and Employment Land Needs Study**

Ribble Valley Borough Council

17 December 2021

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# Contents

<b>1.0</b>	<b>Introduction</b>	<b>1</b>
	Study Scope	1
<b>2.0</b>	<b>Policy Context</b>	<b>4</b>
	Introduction	4
	National	4
	Sub-Regional Evidence Base	9
	Local Evidence Base	16
<b>3.0</b>	<b>Socio-Economic Context</b>	<b>21</b>
	Introduction	21
	Functional Economic Market Area	31
<b>4.0</b>	<b>Implications of Covid-19 on Future Growth scenarios</b>	<b>36</b>
	Implications of Covid-19 on Future Growth and new Ways of Working	39
<b>5.0</b>	<b>Commercial Market Property Signals</b>	<b>40</b>
	Employment Space	40
	Development Rates	42
	Losses	43
	Development Pipeline	44
<b>6.0</b>	<b>Business Survey and Stakeholder Consultation</b>	<b>45</b>
	Introduction	45
	Business Survey Results	45
	Responses of Adjoining LPAs	50
<b>7.0</b>	<b>Review of Employment Sites</b>	<b>53</b>
	Approach	54
	Overview of Committed and Existing Employment Sites	55
	Existing and Allocated Employment Sites	56
	Conclusions	61
<b>8.0</b>	<b>Future Employment Land Requirements</b>	<b>62</b>
	Introduction	62
	Methodology	62
	A. Econometric Job Forecasting	63

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B.	Labour Supply	71
C.	Estimating the Land Requirement	74
D.	Past Development Rates	74
	Flexibility Factor	78
	Planning Requirements	79
	Reality Check	83
<b>9.0</b>	<b>Demand Supply Balance</b>	<b>85</b>
	Introduction	85
	The Need for Employment Land in Ribble Valley	85
	Forward Supply	88
	Qualitative Factors	91
	The Need for Additional Land	93
	Potential Additional Supply	93
	Conclusions	96
<b>10.0</b>	<b>Conclusions and Policy Recommendations</b>	<b>97</b>
	Context	97
	Demand / Supply Results	98

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## 1.0 Introduction

1.1 Lichfields has been commissioned to undertake an Economic and Employment Land Needs Study [EELNS] by Ribble Valley Borough Council [the Council]. The EELNS will form a critical part of the economic evidence base informing the preparation of the Council's Local Plan Review. The study will establish land requirements and policy imperatives in relation to employment land classes E(g)(i) offices, E(g)(ii) R&D, E(g)(iii) light industrial, B2 and B8, other key economic matters arising from the study and to provide growth options to consider with their workforce implications and associated impact on housing requirements.

1.2 The EELNS is also critical to enabling the Council to promote sufficient employment opportunities to help sustain and support major new housing development. In this context, Lichfields has approached the methodology to the EELNS based on the requirements of the National Planning Policy Framework [NPPF] and Planning Practice Guidance [PPG] and, where appropriate, combined work stages to create efficiencies.

### Study Scope

1.3 As required by paragraph 33 of the NPPF, the Council has begun to prepare its Local Plan Review as its Core Strategy has now passed its 5-year review date. In due course, the authority will be required to produce a new style Local Plan in light of the Government's proposed changes to the planning system outlined in the recent White Paper and forthcoming Planning Bill.

1.4 In this context, the Council is therefore seeking to update its evidence base to feed into the production of a Reg 18 options consultation by the end of the year. This EELNS forms a critical part of the evidence base informing the preparation of the Local Plan Review and draws on previous work undertaken; namely: the Housing and Economic Development Plan Document [DPD] (2019), the Longridge Neighbourhood Plan, the Strategic Housing and Economic Needs Assessment [SHENA] (2019); the Ribble Valley Economic Evidence Base – Baseline Report (2018); the Ribble Valley Economic Plan 2019-2022 and the previous Ribble Valley Employment Land Study Refresh (2013).

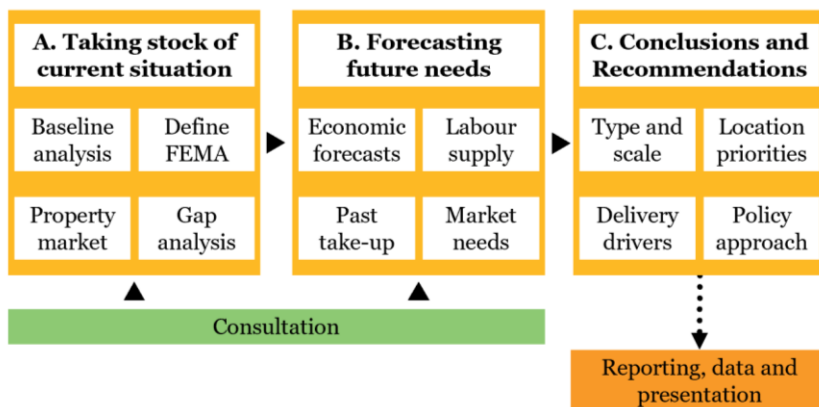
1.5 In preparing the Local Plan review the Council needs to update its evidence on employment issues. The Council has already published work on an economic baseline that also defines the Functional Economic Market Area [FEMA] for Ribble Valley as well as setting a starting point for understanding the make-up and operation of the local economy, areas of weakness and opportunities to maintain and support growth. This EELNS assists the Council in understanding the economic picture of Ribble Valley, the implications of employment growth on workforce and housing requirements and the related need for employment land to address those requirements as best we can at present given the ongoing uncertainty arising from the Covid-19 Pandemic.

1.6 The scope of this EELNS includes consideration of economic development based upon the typologies set out in the Former 'B' Use Classes as outlined below, but drawing on other evidence base information that is available to ensure that there is consideration of other (non B-use) industries insofar as they form economic and employment growth opportunities:

- **Office:** including offices in E(g)(i)– former B1(a) - Use Class and research & development in E(g)(ii) – former B1(b) - Use Class.
- **Industrial:** including light industrial in E(g)(iii)– former B1(c) - Use Class and industrial and manufacturing space in B2 Use Class.

- **Distribution:** including storage and distribution, warehousing and wholesale uses typically in B8 Use Class.
- 1.7 References to ‘employment space/uses’ and ‘employment-based sectors’ refer to all the above uses.
- 1.8 It should be noted that there are a variety of factors and drivers to consider when objectively assessing the business context and needs for a local economy. The study uses a combination of quantitative and qualitative analysis to examine these issues in the context of Ribble Valley and synthesises this analysis to draw overall conclusions and policy implications for long-term planning across Ribble Valley.
- 1.9 The EELNS aligns with current and emerging planned housing growth, as well as other economic policy documents and employment-related development on the fringes of the FEMA, to ensure the evidence dovetails together.
- 1.10 To this end, the study:
- Refreshes the baseline evidence and commentary on the local economy including emerging issues that the Council should have regard to in relation to employment land, workforce and business needs in preparing the Local Plan review;
  - Provides an NPPF-compliant employment needs study indicating anticipated land requirements over the plan period for employment land uses;
  - Reviews the suitability and availability of existing and allocated sites;
  - Appraise the current Office market and advises on key policy considerations in the light of the findings of the appraisal;
  - Reports the findings of a Business Survey of local employers to assess likely needs and emerging policy issues to address in the plan period; and,
  - Engages with all relevant stakeholders including the local business and business groups, the Chamber of Commerce, developers, land promoters, and local property agents.
- 1.11 This study’s methodology conforms to the requirements of the NPPF and the updated PPG and is summarised in Figure 1.1.

Figure 1.1 Employment Land Methodology



Source: Lichfields

## Report Structure

1.12 The report is structured as follows:

- **Section 2 sets out the latest policy context**, including a review of relevant national and local policy documents, employment studies and economic development strategies;
- **Section 3 outlines the socio-economic context** including current economic conditions and trends that may affect future needs for employment space.
- **Section 4 outlines the commercial property market.** This comprises a review of the local commercial property market, including the supply of and demand for different types of employment space within Ribble Valley and the needs of the different market segments. It summarises the findings of the Baseline study on the scope of the FEMA and also provides an overview of employment space across Ribble Valley, including the mix of uses, development rates, completions and losses, supply and demand and the needs of different market segments
- **Section 5 reports the key findings from the online Business Survey;**
- **Section 6 reviews the existing portfolio of employment land and premises** in Ribble Valley against defined criteria including market attractiveness and the ability to meet future needs;
- **Section 7 assesses the future requirement for Employment Space** including estimates of future employment space requirements for office, industrial and distribution sectors in quantitative terms, drawing on employment forecasts and other factors;
- **Section 8 assesses the balance between current land supply and future needs**, an assessment of the balance between existing land supply and future requirements in both quantitative and qualitative terms; and,
- **Section 9 summarises the key conclusions** of the study along with policy recommendations to support the existing and future site portfolio and maximise future economic growth in Ribble Valley.

## 2.0 Policy Context

### Introduction

- 2.1 This section provides a summary of the relevant policies relating to employment land and economic development within Ribble Valley.

### National

#### National Planning Policy Framework

- 2.2 The revised July 2021 NPPF sets out the Government's economic, environmental and social planning policies for England. It states that the purpose of the planning system is to contribute to the achievement of sustainable development [§7]. It states in paragraph 8 that achieving sustainable development means that the planning system has three over-arching objectives, which are interdependent and need to be pursued in mutually supportive ways: economic, social and environmental. The economic objective is to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure.
- 2.3 The NPPF [§20] states that strategic policies should set out an overall strategy for the pattern, scale and quality of development and make sufficient provision for a range of uses, including employment and other commercial development.
- 2.4 Paragraph 31 requires that all policies should be underpinned by relevant and up-to-date evidence, stating that:
- “This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and take into account relevant market signals.”*
- 2.5 Section 6 of the NPPF summarises how the planning system should help build a strong competitive economy:
- “Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. **Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.** The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation, and in areas with high levels of productivity, which should be able to capitalise on their performance and potential.” [§81] (Lichfields’ emphasis)*
- 2.6 The NPPF [§82] indicates that local planning authorities [LPAs] are required to ensure that Local Plan policies set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies [LIS] and other local policies for economic development and regeneration. They should set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period, and seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment. The NPPF also requires planning policies to be sufficiently flexible to accommodate needs not anticipated in the plan, allow for new and flexible working practices (such as live-work accommodation), and to enable a rapid response to changes in economic circumstances.



- 2.7 Furthermore, planning policies and decisions should recognise and address the specific locational requirements of different sectors:

*“This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries; **and for storage and distribution operations** at a variety of scales and in suitably accessible locations.”* [§83] (Lichfields’ emphasis).

- 2.8 The NPPF states that LPAs should ensure an integrated approach to considering the location of housing, economic uses and community facilities and services [§93 (e)].

### **National Planning Practice Guidance**

- 2.9 On 6<sup>th</sup> March 2014 CLG launched the Planning Practice Guidance [PPG] web-based resource<sup>1</sup>. This website brings together many areas of English planning guidance into a new format, linked to the NPPF and replaces the previous Office of the Deputy Prime Minister [ODPM] *Employment Land Reviews: Guidance Note* from 2004 (although this arguably remains a source of good practice).

- 2.10 The PPG has two much-shortened sections in ‘Plan Making’:

#### ***“What are the steps in gathering evidence to plan for business?”***

*Strategic policy-making authorities will need a clear understanding of business requirements in their area. The steps in building up this evidence include:*

- *working together with county and neighbouring authorities, Mayors, combined authorities and with Local Enterprise Partnerships to define the most appropriate geography to prepare policies for employment;*
- *preparing and maintaining a robust evidence base to understand both existing business needs and likely changes in the market, with reference to local industrial strategies where relevant; and*
- *engaging with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability.*<sup>2</sup>

#### ***How can authorities use this evidence base to plan for business?***

*Authorities can use this evidence to assess:*

- *the need for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;*
- *the existing and future supply of land available for economic development and its suitability to meet the identified needs. This should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land.*
- *the likely availability and achievability of employment-led development, taking into account market signals;*
- *the role, capacity and function of town centres and the relationship between them, including any trends in the performance of centres;*
- *locations of deprivation which may benefit from planned remedial action; and*

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<sup>1</sup> <http://planningguidance.planningportal.gov.uk/>

<sup>2</sup> 61-040-20190315

- *the needs of the farming and food production industries, including the location and extent of the best and most versatile agricultural land, and the ways in which planning could support investment in those industries<sup>3</sup>.*

2.11 The PPG has updated its guidance on the assessment of housing and economic development. It states that plan makers should liaise closely with the business community to understand their current and potential future requirements<sup>4</sup>.

2.12 Plan-makers should also assess:

- the best fit FEMA;
- the existing stock of land for employment uses within the area;
- the recent pattern of employment land supply and loss – for example based on extant planning permissions and planning applications (or losses to permitted development);
- evidence of market demand (including the locational and premises requirements of particular types of business) - sourced from local data and market intelligence, such as recent surveys of business needs, discussions with developers and property agents and engagement with business and economic forums;
- wider market signals relating to economic growth, diversification and innovation; and,
- any evidence of market failure – such as physical or ownership constraints that prevent the employment site being used effectively.

2.13 In terms of using market signals to help forecast future needs, the PPG<sup>5</sup> advises that a range of data which is current and robust should be used, such as:

- sectoral and employment forecasts and projections which take account of likely changes in skills needed (labour demand);
- demographically derived assessments of current and future local labour supply (labour supply techniques);
- analysis based on the past take-up of employment land and property and/or future property market requirements; and,
- consultation with relevant organisations, studies of business trends, an understanding of innovative and changing business models, particularly those which make use of online platforms to respond to consumer demand and monitoring of business, economic and employment statistics.

2.14 Regarding how market demand can be analysed, the PPG<sup>6</sup> advises that plan makers should note that:

*“The available stock of land can be compared with the particular requirements of the area so that ‘gaps’ in local employment land provision can be identified.*

*It is important to consider recent employment land take up and projections (based on past trends) and forecasts (based on future scenarios), and to identify instances where sites have been developed or sought for specialist economic uses. This will help to provide an understanding of the underlying requirements for office, general business and distribution space, and (when compared with the overall stock of employment sites) can form the context for appraising individual sites.*

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<sup>3</sup>Practice Guidance Reference 61-041-20190315

<sup>4</sup> Practice Guidance Reference 2a-026-20190220

<sup>5</sup> Practice Guidance Reference 2a-027-20190220

<sup>6</sup> Practice Guidance Reference 2a-029-20190220

*Analysing supply and demand will allow policy makers to identify whether there is a mismatch between quantitative and qualitative supply of and demand for employment sites. This will enable an understanding of which market segments are over-supplied to be derived and those which are undersupplied.”*

2.15 In order to derive employment land requirements, the PPG<sup>7</sup> states that when translating employment and output forecasts into land requirements there are four key relationships which need to be quantified:

- Standard Industrial Classification sectors to use classes;
- Standard Industrial Classification sectors to type of property;
- Employment to floorspace (employment density); and,
- Floorspace to site area (plot ratio based on industry proxies).

2.16 The PPG has also added in two new sections on how authorities can assess need and allocate space for logistics<sup>8</sup> and how specific locational requirements of specialist or new sectors be addressed<sup>9</sup>.

2.17 Regarding the former, the PPG recognises that the logistics industry plays a critical role in enabling an efficient, sustainable and effective supply of goods for consumers and businesses, as well as contributing to local employment opportunities, and has distinct locational requirements that need to be considered in formulating planning policies (separately from those relating to general industrial land). To address this, the PPG states that:

*“Strategic facilities serving national or regional markets are likely to require significant amounts of land, good access to strategic transport networks, sufficient power capacity and access to appropriately skilled local labour. Where a need for such facilities may exist, strategic policy-making authorities should collaborate with other authorities, infrastructure providers and other interests to identify the scale of need across the relevant market areas. This can be informed by:*

- *engagement with logistics developers and occupiers to understand the changing nature of requirements in terms of the type, size and location of facilities, including the impact of new and emerging technologies;*
- *analysis of market signals, including trends in take up and the availability of logistics land and floorspace across the relevant market geographies;*
- *analysis of economic forecasts to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities, or which require support from the sector; and*
- *engagement with Local Enterprise Partnerships and review of their plans and strategies, including economic priorities within Local Industrial Strategies.*

*Strategic policy-making authorities will then need to consider the most appropriate locations for meeting these identified needs (whether through the expansion of existing sites or development of new ones).”*

2.18 Regarding the former, the PPG states that when assessing what land and policy support may be needed for different employment uses, it will be important to understand whether there are specific requirements in the local market which affect the types of land or premises needed:

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<sup>7</sup> Practice Guidance Reference 2a-030-20190220

<sup>8</sup> Practice Guidance Reference 2a-031-20190722

<sup>9</sup> Practice Guidance Reference 2a-032-20190722

*“Clustering of certain industries (such as some high tech, engineering, digital, creative and logistics activities) can play an important role in supporting collaboration, innovation, productivity, and sustainability, as well as in driving the economic prospects of the areas in which they locate. Strategic policy-making authorities will need to develop a clear understanding of such needs and how they might be addressed taking account of relevant evidence and policy within Local Industrial Strategies. For example, this might include the need for greater studio capacity, co-working spaces or research facilities.*

*These needs are often more qualitative in nature and will have to be informed by engagement with businesses and occupiers within relevant sectors.”*

### **Build Back Better – Our Plan for Growth**

- 2.19 The March 2021 Budget was accompanied by the publication of “*Build Back Better: our plan for growth*”, a policy paper which sets out the Government’s plans to support economic growth through investment in infrastructure, skills and innovation. It provides a new framework that supersedes the 2017 Industrial Strategy as a central policy reference point.
- 2.20 The plan for growth focuses on three pillars of investment to act as the foundation on which to build the economic recovery, uniting and levelling up the country:
- 1 *“High quality **infrastructure** is crucial for economic growth, boosting productivity and competitiveness. The UK has historically underinvested in infrastructure, but we are fixing that, starting with £100 billion of capital investment in 2021-22.*
  - 2 *The best way to improve people’s life chances is to give them the **skills** to succeed. The UK has a strong foundation of advanced skills, but lags behind international comparators on technical and basic adult skills. The government is transforming Further Education, encouraging lifelong learning through the Lifetime Skills Guarantee, and building an apprenticeships revolution.*
  - 3 ***Innovation** drives economic growth and creates jobs. The UK has a world-leading research base, which will be boosted by the government’s significant uplift in R&D investment and the creation of the Advanced Research & Invention Agency to fund high-risk, high-reward research. However, too few businesses are able to access the tools they need to translate new ideas into new products and services and to challenge established businesses. We will make the UK the best ecosystem in the world for starting and growing a business. That means having the best access to capital, skills and ideas, as well as a smart and stable regulatory framework.”*
- 2.21 The paper details a series of new funding arrangements and confirms that the long-awaited UK Shared Prosperity Fund will arrive in 2022 to replace European Union structural funds as they expire after 2022-23.
- 2.22 The Infrastructure Core Pillar will be supported by the following interventions:
- Stimulate short-term economic activity and drive long-term productivity improvements via record investment in broadband, roads, rail and cities, as part of capital spending plans worth £100 billion next year.
  - Connect people to opportunity via the UK-wide Levelling Up Fund and UK Shared Prosperity Fund, as well as the Towns Fund and High Street Fund, to invest in local areas.
  - Help achieve net zero via £12 billion of funding for projects through the Ten Point Plan for a Green Industrial Revolution.
  - Support investment through the new UK Infrastructure Bank which will ‘crowd-in’ private investment to accelerate progress to net zero, helping to level up the UK. This will invest in

local authority and private sector infrastructure projects, as well as providing an advisory function to help with the development and delivery of projects.

2.23 The growth is focused on driving the Government's levelling up agenda, which aims to regenerate struggling towns in all parts of the UK via the UK Shared Prosperity Fund and the UK-wide Levelling Up Fund, with Freeports across the country.

2.24 The Plan goes on to set out the Government's long-term vision for every region and nation to have at least one globally competitive city at its heart to help drive prosperity. This includes City and Growth Deals, £4.2 billion in intra-city transport settlements from 2022-23, and continued Transforming Cities Fund investment to 2022-23. It also aims to catalyse centres of excellence, supporting individuals across the country to access jobs and opportunities by ensuring digital and transport connectivity, by establishing a new UK Infrastructure Bank in the North of England and by relocating 22,000 Civil Service roles out of London.

## **Sub-Regional Evidence Base**

### **Lancashire Strategic Economic Plan (2014)**

2.25 The Lancashire Strategic Economic Plan [SEP], developed by the Lancashire Enterprise Partnership [LEP], sets out the growth ambitions of the sub-region to 2024, providing the framework for the Growth Deal with government and directing resources within the agreed European Structural Investment Fund [ESIF] strategy. It states that:

*“The overarching purpose of the SEP and Growth Deal is to re-establish Lancashire as an economic powerhouse and a national centre of excellence in advanced manufacturing by maximising its clear competitive strengths and capabilities in the aerospace, automotive, energy and health science related sectors.”*

2.26 The SEP outlines a number of key objectives including:

- *“Establishing Lancashire as the natural home for high growth companies, with a clear focus on maximising our competitive economic strengths, and a strong private sector business-base to underpin the future prosperity Lancashire; and,*
- *Reclaiming Lancashire's role as a national centre for advanced manufacturing by realising the potential of the area's strengths and capabilities in aerospace, automotive and energy supply chain sectors, which are amongst the strongest in the UK;”*

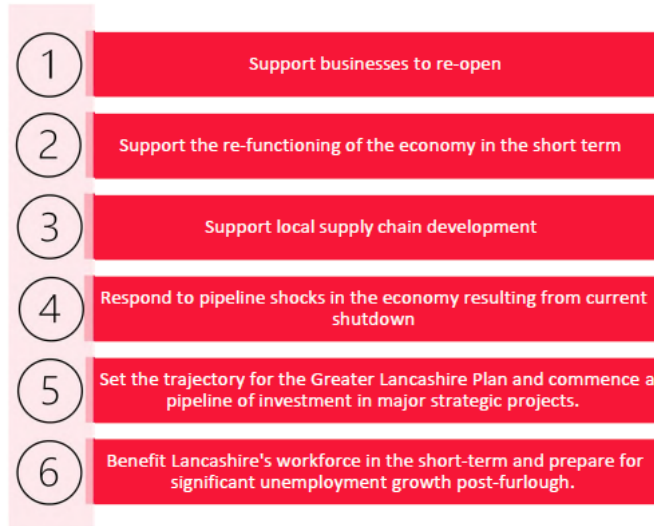
2.27 By concentrating focus on Lancashire's competitive strengths and capabilities, tackling major infrastructure constraints, boosting the business base, and refocusing the approach to skills, the LEP hopes to establish new economic opportunities that can deliver 50,000 new jobs, 40,000 new house and £3 billion in additional economic activity.

### **Redefining Lancashire: Our Approach to Recovery (June 2020)**

2.28 This document sets out the first steps of a Covid-19 Recovery Plan, setting out Lancashire's economic priorities. It includes a series of projects and programmes designed to support the refunctioning of the Lancashire economy over the next 12 months. The programmes identified for support have been designed to bridge the gap between direct short-term support provided to reopen town centres and restart public transport, and the longer term strategic ambition for Lancashire and the associated infrastructure and capital investment projects.

2.29 The Recovery Plan’s key objectives to kickstart the economic recovery in Lancashire are set out below:

**Objectives**



2.30 As part of the propositions for immediate action, the Plan sets out that an Aerospace Task Force has been created for the North of England with membership from BAE Systems, Rolls Royce, Safran Nacelles, Addison Precision, Senior Aerospace Westons, Kaman, ELE Technologies, Hycrome Aerospace, Gardner Aerospace, Airbus and Paradigm Precision amongst others.

2.31 This Task Force is expected to appraise and rapidly set out the actions necessary to mitigate the loss of jobs and make representation to government on the route-map to recovery. It identifies that immediate support is required in the form of maintaining dialogue with all parties to enable:

- Tracking other countries' critical issues and support programmes with a view to working together;
- Onshore / support incentives through competitiveness and better cost positioning;
- Support to SME’s through start-up programmes (e.g. selected Supply Chain 21 modules);
- Assess and act on consolidation, support the ‘right’ acquisitions;
- Invest in technology - product and process to drive efficiency;
- Invest in research, marketing, engineering, tooling; and
- Increase engagement with Defence, including, for example, shared supply initiatives, improvement, transparency, fragility and mitigation.

2.32 A further ‘urgent and immediate’ proposition involves Lancashire’s beleaguered manufacturing industry. The Plan notes that a temporary collapse in demand for Advanced Engineering & Manufacturing products has taken place as a result of Covid-19 declines in travel, activity and energy demand, impacting the aerospace, automotive & power markets and supply chains. In turn, significant numbers of high value added jobs have been furloughed and potentially lost. This poses an existential risk to capacity and skills, irreplaceably lost to the wealth generating capability of the region:

*“Lancashire’s established and developing capabilities in the manufacturing, health innovation and digital sectors should be supported to deliver products and solutions that directly respond*

*to the crisis and help build Lancashire's ongoing resilience to Covid-19 and economic challenges in the longer term. The development of a local supply chain network will maximise the potential of Lancashire's economy and support job creation and retention."* [page 18]

2.33 The Made in Lancashire proposition comprises of 4 programmes designed to:

- Provide direct focused support to a range of impacted sectors;
- Address employment and skills challenges ahead, retaining talent and jobs, and minimising the long term potential impacts of recession on Lancashire's talent base;
- Develop local supply chains and allow consumers to access local products; and,
- Provide a catalyst to start the process of transforming health and social care provision and position Lancashire to build on its health innovation strengths to drive growth in the health sector.

2.34 This includes sectoral support for the industry, investment in skills, and developing local supply chains to support reshoring and adaptation of manufacturing.

### **Lancashire Growth Deal**

2.35 The Growth Deal is £320 million of government funding being delivered by the LEP to support economic growth in the area. The programme is a key part of the Northern Powerhouse initiative and is driving growth across the county. It is intended to help generate up to 11,000 new jobs, create 3,900 new homes and attract £1.2 billion of additional public and private investment for Lancashire<sup>10</sup>.

2.36 The Lancashire Growth Deal is focussed on four themes:

- Releasing Growth Potential;
- Renewal of Blackpool;
- Growing the local Skills and Business Base; and,
- Innovation and Manufacturing Excellence.

2.37 Over 40 projects have benefitted directly, including:

- The North West Advanced Manufacturing Research Centre [AMRC] at the Samlesbury Enterprise Zone site which will drive innovation and growth across a range of advanced manufacturing disciplines.
- Boost; Lancashire's Business Growth Hub - one of 38 Growth Hubs in the UK which is led by Lancashire County Council and the Lancashire LEP. It comprises a business support programme for ambitious, fast-growing SMEs.
- Key employment and regeneration sites including Burnley's Vision Park, the Lomeshaye Industrial Estate, Spinning Point in Rossendale and Pendle's Northlight.

### **Lancashire Skills and Employment Strategy Framework 2021 refresh**

2.38 The Lancashire Skills and Employment Strategic Framework 2016-2020 was published in February 2016 and provided a shared focus and platform aimed at improving the responsiveness of the skills and employment system to the needs of Lancashire. Driven by Lancashire's Skills and Employment Advisory Panel, the framework was underpinned by an extensive evidence base and was aligned with Lancashire's SEP<sup>11</sup>.

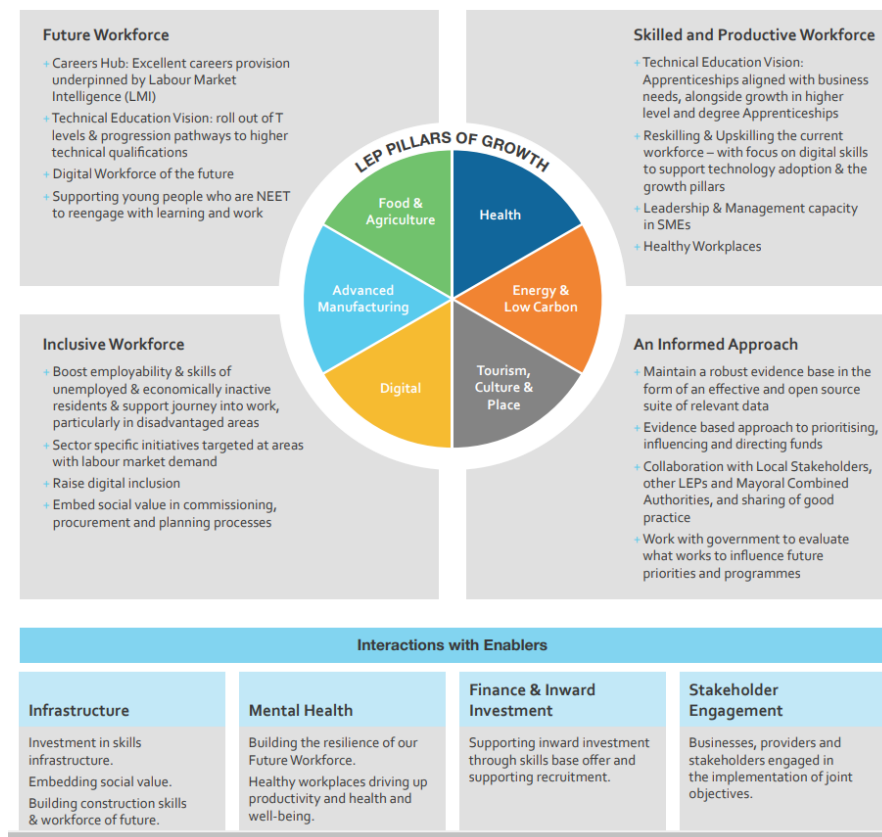
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<sup>10</sup> <https://lancashirelep.co.uk/key-initiatives/growth-deal/>

<sup>11</sup> Lancashire Enterprise Partnership (2021): Lancashire Skills and Employment Strategic Framework 2021 Refresh, incorporating the Local Skills Report

2.39 The Lancashire Skills and Employment Strategic Framework aims to build a talent pipeline aligned with the needs of the economy, boost the skills of our people to enhance productivity and drive an inclusive workforce in partnership with businesses, providers and stakeholders. The Pillars of Growth, set against a number of key themes, are summarised below:

Figure 2.1 LEP Pillars of Growth



Source: Lancashire Skills and Employment Strategy Framework 2021 refresh (2021)

### Lancashire Enterprise Zone

2.40 The LEP secured Enterprise Zone [EZ] status for four development sites across Lancashire, which was the largest number of EZ sites awarded to a single LEP. The four sites together form the Lancashire Advanced Manufacturing and Energy Cluster [LAMEC], which is intended to be a centre of excellence for high technology manufacturing. The intention is for the LAMEC to be a major element of the Northern Powerhouse economic and investor offer, helping to create over 10,000 high value jobs. The four sites are at Samlesbury and Warton, which are adjacent to BAE Systems operations, and at Blackpool Airport and Hillhouse in Wyre. The EZ sites have a strong, complementary industrial focus which build on Lancashire’s national and international strengths in aerospace, advanced engineering and manufacturing, energy and chemicals.<sup>12</sup>

### Samlesbury Aerospace Enterprise Zone

2.41 The Samlesbury Aerospace Enterprise Zone straddles the administrative boundary between Ribble Valley and the adjacent borough of South Ribble and adjoins BAE Systems’ 72 hectare site at Samlesbury. Road improvements in 2018 have created new access from the A59 to the BAE Academy for Skills and Knowledge Training Centre and Wincanton Defence Logistics

<sup>12</sup> <https://lancashirelep.co.uk/key-initiatives/lamec/>



Facility. The world-renowned Advanced Manufacturing and Research Centre is expected to be fully operational on the site by the end of 2020. When fully developed, it is intended that the site will be a national centre of excellence for advanced engineering and manufacturing.

2.42 According to the Samlesbury Aerospace Enterprise Zone Brochure, the EZ offers flexible opportunities for a range of unit sizes (B1, B2, B8 in the Advanced Engineering & Manufacturing sector) to meet the needs of business from small offices, research laboratories to large industrial units. The commercial development framework in place for the site represents indicative plot layouts and capacity:

Figure 2.2 Samlesbury Aerospace Enterprise Zone Masterplan



Source: Lancashire Enterprise Partnership: Samlesbury Aerospace Enterprise Zone Brochure

### **Growth Lancashire Business Plan 2021-2022**

2.43 Growth Lancashire’s latest Business Plan has the following key actions for 2021/22:

- Regular engagement with Local Authority partners to understand current and future requirements, and where the company can add value, either through its in-house team or procured services;
- Build effective relationships with existing procured suppliers, and introduce new suppliers where there is demand; and,
- Business development activity with wider stakeholders, notably private sector clients – and to include appropriate marketing of all new services.

### **Lancashire Aerospace Task Force A Recovery Plan for Lancashire October 2020**

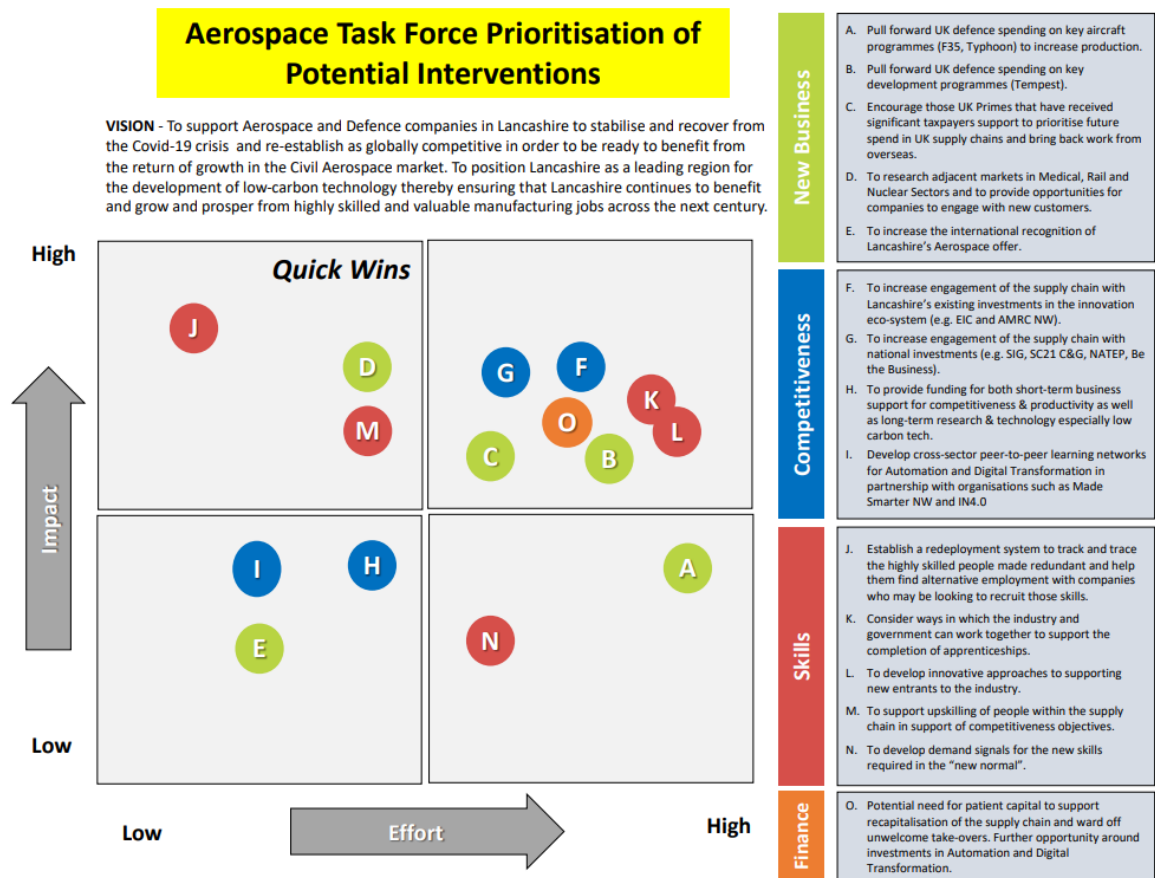
2.44 The October 2020 Lancashire Aerospace Recovery Plan was produced in response to the dramatic fall in air passengers resulting from the Pandemic in 2020. The cuts to aircraft

production by primes such as Airbus and Boeing have a corresponding impact on all levels of the supply chain; from Rolls Royce down to the SMEs. Given Lancashire's critical mass of companies in the Aerospace Supply Chain it was important to understand the impact of Covid-19 on the industry in Lancashire, hence the production of this Recovery Plan.

- 2.45 Analysis by NWAA, focussing on aerospace related manufacturing, indicates that, 31 of the top aerospace companies are located in Lancashire and have a combined turnover of almost £5 billion and employ 17,000 people, some 25% more than the official numbers would suggest. Furthermore, there are an additional 22 NWAA members with a Lancashire postcode. Approximately 9,000 of these jobs are in BAE Systems (Warton and Samlesbury), whilst the other 8,000 are in the 50+ supply chain companies. The recovery Plan found that there was no indication of any impact of Covid-19 on employment within BAE Systems. The analysis is therefore focused on the impact on employment, of the remaining 8,000 jobs in the Lancashire Aerospace Supply Chain. On average, the Civil Aerospace market has suffered a 40% reduction in work. This will significantly impact the Lancashire Aerospace Supply Chain's 55% workshare.
- 2.46 The recovery Plan predicted that Covid-19 could impact as many as 6,459 direct, indirect and induced aerospace jobs in Lancashire.
- 2.47 As a consequence, the Recovery Plan identified the following vision for Lancashire's Aerospace industry:
- “To support Aerospace and Defence companies in Lancashire to stabilise and recover from the Covid-19 crisis and re-establish as globally competitive businesses, in order to be ready to benefit from the return of growth in the Civil Aerospace market. To position Lancashire as a leading region for the development of low-carbon technology thereby ensuring that Lancashire continues to benefit and grow and prosperity from highly skilled and valuable manufacturing jobs across the next century.”*
- 2.48 The Lancashire Aerospace Task Force identifies 15 possible interventions that can support Lancashire's aerospace businesses and jobs threatened by the Covid-19 pandemic. The 15 interventions range in scope and complexity and can be broadly placed in four themes of - winning new work, competitiveness, skills and new financial instruments.

2.49 These are prioritised as follows:

Figure 2.3 Aerospace Task Force Prioritisation of Potential Interventions



Source: Lancashire Aerospace Task Force A Recovery Plan for Lancashire October 2020

2.50 To ensure Lancashire' Aerospace Sector can recover and grow, the Recovery Plan concludes that it is necessary to protect the core capability and its competitiveness to innovate and win market share as demand returns. It is also vital to safeguard the supply chain to serve the needs of UK military aircraft capability.

2.51 The Lancashire Aerospace Task Force has put forward an evidence base for a number of interventions to support businesses impacted by the pandemic, and identified three scenarios that are felt to be the best proxy indicators of what could happen to the aviation sector. These are 1) '**Rebound**', which requires a quick response to the redundancies that will take place to ensure that highly skilled people are redeployed in Lancashire; 2) '**Gradual Recovery**', which involves the creation of a central Lancashire Aerospace 'Watchtower' identifying and engaging with businesses to provide support for diversification, internationalisation, and investment in technology and competitiveness for the medium and long term; and 3) '**Prolongated Recovery**' whereby the LEP leads a Campaign for Lancashire and a Skills Strategy for Apprentices and Graduates.

2.52 The Task Force finally recommends that there is a need to develop a flexible response to all three scenarios simultaneously and to provide increasing focus and effort to the proposed solutions as we sense the real impact of the covid-19 pandemic over time. The LEP commits to producing a detailed delivery plan that sets out how it will implement the recommendations of the Aerospace Task Force.

## Local Evidence Base

### Ribble Valley Core Strategy (2014)

- 2.53 The Council's *Core Strategy 2008 – 2028 A Local Plan for Ribble Valley* was adopted in December 2014. One of the Core objectives of the Core Strategy is to improve the competitiveness and productivity of local businesses by safeguarding and promoting local employment opportunities. This is important as it one of the major issues facing the Ribble Valley. The Core Strategy states:
- “Although the Ribble Valley is seen as an attractive place to live, there are a limited number of employment opportunities available in the borough, which results in a high level of daily out commuting to access employment opportunities. Through improving the competitiveness and productivity of local businesses by safeguarding and promoting local employment opportunities, this trend should be reversed or at least lessened giving the borough a competitive employment market, which can compete with nearby boroughs such as Preston and Blackburn.”* [§3.14]
- 2.54 Key Statement DS1: Development Strategy states that Strategic employment opportunities will be promoted through the development of the Barrow Enterprise Site as a main location for employment and the Samlesbury Enterprise Zone.
- 2.55 Section 7 of the Core Strategy addresses the Economy. The introduction to this Chapter states that the Council will seek to facilitate employment and economic investment where it accords with the Core Strategy policies. There is a general strategic policy aspiration to ensure that all new development is sustainable and contributes to reducing the existing problems of out-commuting, lack of local employment opportunities and associated problems such as environmental sustainability. To support the expansion of Ribble Valley's economy (in particular in business services) further office accommodation will need to be provided either by new build or converted space including potential uses in redundant farm buildings. In terms of factors that should influence the location of new employment sites, an integrated approach in which equal weight is given to the market, the needs of businesses, the environment and sustainability, appears the most appropriate way forward [§7.3].
- 2.56 Regarding the broad location of new employment development, it will generally be directed to the main areas of population growth linking to the underlying strategy of aligning jobs with homes in key areas. This strategy is underpinned by an approach that aims to link local jobs to meet local labour supply and thus achieve a sustainable balance between land uses. This has the potential to reduce the levels of out-commuting and increase self-containment bringing additional benefits including reducing carbon emissions from dispersed development due to increased car use.
- 2.57 The larger settlements of Clitheroe, Longridge and Whalley are the preferred locations for new employment development. The CS recognises that suitable locations that are well related to the A59 corridor will also have the potential to deliver economic growth through the delivery of appropriate sites. The potential for appropriate land to be brought forward as part of strategic land releases will also be considered particularly where this will contribute to greater sustainability Growth at the BAe Samlesbury site is anticipated to occur given that it is a regionally significant site and now part of the Lancashire Enterprise Zone [§7.5].
- 2.58 In this regard, *Key Statement EC1: Business and Employment Development* advises that Employment development will be directed towards the main settlement of Clitheroe, Whalley and Longridge as the preferred locations to accommodate employment growth together with

land at Barrow Enterprise Site, the Lancashire Enterprise Zone at Samlesbury and locations well related to the A59 corridor. It states that:

*“The Council, in line with the evidence it has gathered, will aim to allocate an **additional 8 hectares of land for employment purpose** in appropriate and sustainable locations during the lifetime of this plan. Land will be made available for employment use in order to support the health of the local economy and wider sustainable job creation. The expansion of existing businesses will, wherever appropriate, be considered favourably. In considering the development of land for economic development and in determining where this land will be located, priority will be given to the use of appropriate Brownfield sites to deliver employment-generating uses including a preference for the re-use of existing employment sites before alternatives are considered. New sites will be identified in accord with the development strategy where the health of the local and, in relevant cases, the wider economy support such release...”*

*The Council considers, in line with neighbouring authorities and other bodies, that the BAe Samlesbury site 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 Ribble Valley’s general employment land supply. The Council will therefore support the delivery of the Enterprise Zone and has produced a Local Development Order to achieve this.”*

- 2.59 The CS identifies a target of an average of 1 ha of new employment land should be developed per annum, with no net loss over the plan period (page 125).

### **Ribble Valley Housing and Economic Development Plan Document**

- 2.60 Following the adoption of the Core Strategy in 2014 the Council has prepared a Housing and Economic [HED] DPD. This plan, adopted in October 2019, sets out more detailed policy coverage for matters relating to housing and economy to fully implement the policies of the Core Strategy.

- 2.61 Through this plan, the Council seeks to allocate land to meet residual employment land requirements as measured against the overall requirement and spatial distribution of employment provision set out in the Core Strategy. It states that:

*“The allocations set out in this document have been selected based upon the outcomes of the consultation undertaken at Issues and Options stage (Regulation 18) between August and October 2016, and the outcomes of the consultation at Preferred Option stage (Regulation 19) between April and June 2017, as well as the testing work undertaken as part of the Sustainability Appraisal (SA). In terms of the objectively assessed need, there remains a residual requirement for employment land across the borough of 2.41ha.” [page 18]*

- 2.62 The Council proposes to allocate 4ha of employment land in the DPD. This results in an overprovision against the identified requirement in the Core Strategy of 1.6ha. It advises that:

*“In making these allocations the plan addresses the identified requirements of the Core Strategy whilst also ensuring the delivery of necessary employment land to meet requirements for Longridge. Overall, the Council when taking these allocations and existing commitments into account provides through this plan for a choice of sites and locations to accommodate economic growth.”*

- 2.63 Land is allocated for employment uses (defined as uses falling within classes B1 to B8) to meet employment land requirements in the plan period (2008-2028) as follows:

- Policy EAL1 Land at Sykes Holt, Mellor (1.7ha);
- Policy EAL2 Land at Time Technology Park, Simonstone (0.8ha); and,
- Policy EAL3 Land at Higher College Farm, Longridge (1.5ha).

### **Ribble Valley Employment Land Study Refresh (2013)**

2.64 BE Group produced an Employment Land Study refresh of the previous Employment Land and Retail Study (October 2008) on behalf of the Council in May 2013. The report assesses the supply, need and demand for employment land and premises (use class B) in Ribble Valley to provide robust evidence to underpin and inform the Council’s Local Plan for the period to 2028.

2.65 There are five main elements to this study:

- An assessment of the Ribble Valley’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 Ribble Valley’s future land needs;
- An assessment of the potential impact of major public and private sector development proposals, notably the EZ at Samlesbury;
- Recommendations on the future allocation of employment land and premises to maintain the Ribble Valley’s economic growth.

2.66 In terms of the supply of sites, as of 31<sup>st</sup> March 2012 there was a headline supply of 20 ha of available employment land, made up of 12 sites. 61% 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).

2.67 The report modelled a range of employment land scenarios including past take up rates, labour supply projections and job growth forecasts. The results are reproduced below:

**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

2.68 Compared against the headline supply of 20 ha, BE Group concluded that an additional 3.73 ha is required based on long term past take-up rates (averaging 1.13 ha per annum over a 14-year period). This increases to 8.05 ha when measured against the worst-case supply scenario (i.e. if

the Papillon site is excluded). If short term take-up rates are used (1.26 ha over the past 5 years), then the land need increases to almost 11 ha over the 16-year plan period to 2028. These requirements all 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.

2.69 BE Group notes that the ‘policy on’ models indicate shortfalls of up to 14.63 ha. It advises that:  
*“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.” [page 3]*

2.70 The ‘policy on’ scenario is based on the information contained within the Lancashire Advanced Engineering and Manufacturing EZ bid application. 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 EZ’s introduction;
- There will be an increase of 3,000 in the number of residents working, rather than an increase of 1,600 –again as a result of the EZ’s introduction;
- The resident employment rate increases to 86% in 2028, compared to 84% in the ‘policy off’ forecast.
- Reflecting the nature of the EZ the manufacturing, transportation, and administrative and support services sectors see enhanced levels of employment growth, compared to the ‘policy off’ forecast.

2.71 The report advises that:

*“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.” [page 3]*

2.72 **The report ultimately concludes that the Council should adopt the long-term land take-up scenario – i.e. a need of 23.73 ha. This suggests that the Ribble Valley requires another 8 ha of employment land, to 2028 under the worst-case supply scenario.**

2.73 To address this shortfall, BE Group recommended that the Council should 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).

2.74 The report also recommends that the Council should also 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:

- 1 Barrow Brook Business Park, Barrow;
- 2 Samlesbury Aerodrome;
- 3 The Sidings, Whalley;
- 4 Salthill Industrial Estate, Clitheroe;
- 5 Shay Lane Industrial Estate, Longridge; and,
- 6 Time Technology Park, Simonstone.

## **Ribble Valley Strategic Housing and Economic Needs Assessment 2019 (Draft Report for Consultation)**

- 2.75 Ribble Valley Council commissioned Turley to produce a SHENA, which will inform the future review of its Local Plan. Published in draft for consultation in September 2019, the SHENA presents evidence on the overall local housing need in Ribble Valley for the Council to draw upon in establishing its housing requirement in the emerging Local Plan. This includes a separate calculation of the need for affordable housing in the Ribble Valley.
- 2.76 The SHENA reports that the standard method calculates that a minimum of 148 dwellings per annum [dpa] are needed in Ribble Valley, when the demographic baseline of the 2014-based household projections is formulaically adjusted by 17.5% to reflect imbalance between median house prices and resident earnings in the Ribble Valley.
- 2.77 This report presents modelling which indicates that up to 248 dwellings per annum could be needed to support the job growth potential identified through baseline employment forecasts, and provide the labour force required to secure job growth of 0.2% each year. This slightly uplifts the average rate of provision since the start of the current plan period (235dpa).
- 2.78 The SHENA assessment identified that the baseline forecasts upon which the above modelled estimate of need is based assume that there will be relatively sizeable job losses in the manufacturing sector. This assumption, inherent with the forecasting houses' assumptions at a national level, conflicts with local evidence of a relatively resilient industry. It advises that:
- “Significantly, ongoing initiatives by the Lancashire Enterprise Partnership assume that such a circumstance will be mitigated, aiming instead at stability or more positively growth in this sector. Where this stability is assumed to continue throughout the plan period, analysis produced to inform this assessment of housing need suggests that **a higher rate of overall employment growth could be expected in Ribble Valley (0.3-0.4% per annum).**”*  
[page iii]
- 2.79 Up-to-date modelling presented in this report suggests that the Council could support and encourage such a rate of employment growth by broadly retaining its existing requirement for 280 dpa, which would equate to 0.3% p.a. job growth. *“In the context of the NPPF and PPG, continuing to recognise this level of need as being more representative of that required to proactively address a potential barrier to investment and enable a continuation of the housing delivery achieved in stronger years over the long-term would, on the basis of the evidence presented in this assessment, be appropriate.”* [page iii]
- 2.80 Whilst the standard method is recognised as providing a minimum starting point, the SHENA recommends that it would be more appropriate to recognise that the full need for housing lies broadly in line with the 280 dpa previously evidenced and planned for in Ribble Valley. Where this leads to a significant departure from the rate of employment growth assumed within the modelling presented herein, the SHENA advises the Council to reconsider the housing growth that may be needed in such circumstances.



## 3.0 **Socio-Economic Context**

### **Introduction**

3.1 This section set out the socio-economic context for Ribble Valley following on from the Covid-19 pandemic, Brexit uncertainty and very considerable associated economic shock. The findings are primarily based upon statistical data sources but have been validated and tested in consultations with key economic development stakeholders.

3.2 The section provides analysis of key indicators for a range of topics, including economic performance, business demography, labour market, population demographics and deprivation. Comparisons are made to the data for the rest of Lancashire (where available), the North West and England as a whole to provide points of reference.

### **Demographics**

3.3 The population of Ribble Valley was 62,026 in 2020, having grown by 4,808 residents, or 8.4%, since 2010. This is a much higher level of population growth than seen across the North West (5.0%) and England (7.4%)<sup>13</sup>.

3.4 In 2020, 38,450 (62.0%) of Ribble Valley's population was of working age (16 – 66), having grown by 4.2% since 2010. Again, this is a much higher level of growth than seen regionally (0.9%) or nationally (3.3%). However, the retirement-age population of Ribble Valley (aged 67+) has increased by 3,365 people or 34.4% over the past ten years, compared to 21.4% regionally and 24.6% nationally. Overall, this has had the effect of increasing the share of retirement-age residents in Ribble Valley to 21.2% in 2020 (compared to 16.7% regionally and 16.5% nationally) from 17.1% in 2010. Similarly, the working-age population of Ribble Valley has fallen from 64.5% of all residents in 2010 to 62.0% in 2020 (compared to 64.1% regionally and 64.3% nationally).

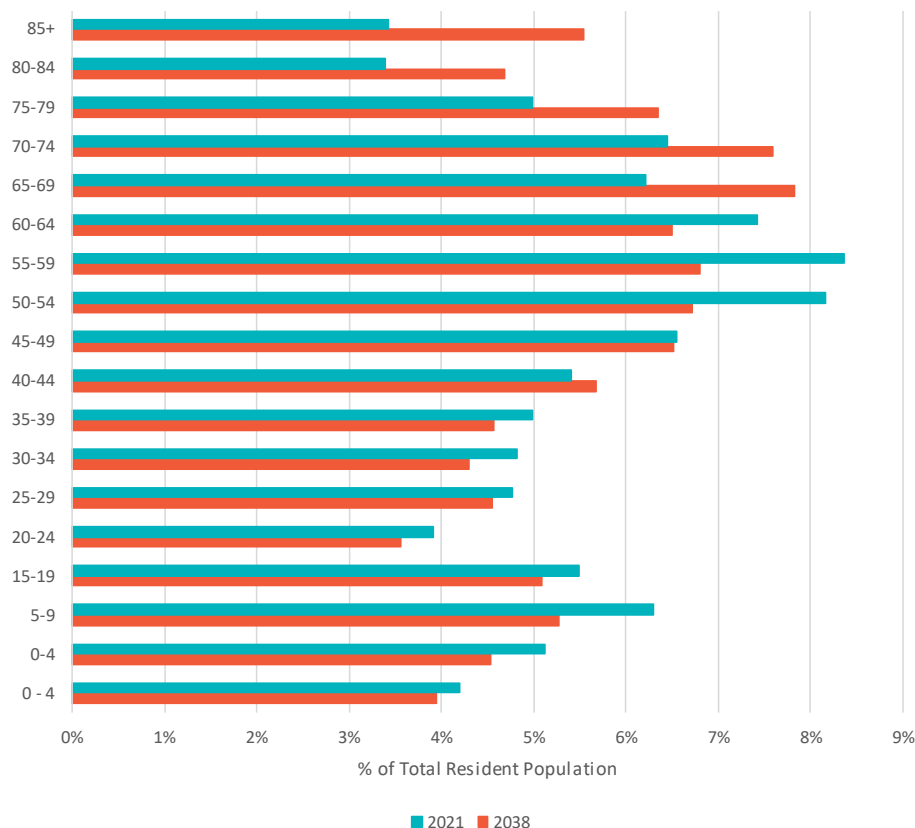
3.5 Looking forward, according to the latest ONS 2018-based Sub-National Population Projections [SNPP], the population of Ribble Valley is forecast to grow by 5,403 residents or 8.8% over the plan period from 2021-2038, a higher level of growth than forecast for the North West (5.5%) or England (6.6%). However, over the same period, the working-age population of Ribble Valley is set to fall by 55 residents or -0.1%, compared to rises of 1.3% and 2.5% regionally and nationally. This means that the retirement-age population of Ribble Valley is set to be the driver of population growth over the plan period, with the number of older residents increasing by a very substantial 5,906 people or 44.0% compared to 31.6% regionally and 35.9% nationally.

3.6 As shown in Figure 3.1, this all means that the population profile of Ribble Valley will change quite dramatically between 2021 and 2038, shifting towards a predominantly middle and old-aged population. The working-age population is set to fall from 61.2% to 56.2%, whilst the population aged 67+ is set to increase from 21.9% to 28.9%. The Figure indicates that the growth will be most pronounced amongst residents aged over 85, whose numbers are projected to increase by three quarters over the next 17 years alone.

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<sup>13</sup> ONS (2021): 2020 Mid-Year Population Estimates

Figure 3.1 Population by age group, 2021 to 2038



Source: ONS (2020): 2018-based SNPP

### Labour Market

- 3.7 There were 30,300 economically active residents in Ribble Valley in the year to March 2021, accounting for 85.1% of residents aged 16 – 64. This is a higher share than seen across Lancashire (77.1%), the North West (76.1%) or England (79.1%)<sup>14</sup>. Interestingly, the activity rate in Ribble Valley has risen to 85.1% currently, from 81.1% in 2020 and 78.3% in 2019 despite the impact of Covid-19, whilst it has fallen in the comparator areas. This may be due to a rising number of residents actively searching for work who were not pre-pandemic. However, if we look at the overall rate for those aged 16+, the rate has fallen slightly from 62.3% to 61.8% and is more comparable with Lancashire (60.4%), the North West (61.2%) and England (63.7%). This may be due to an increasing number of people deciding to retire during the pandemic.
- 3.8 In this same period (year to March 2021), there were around 800 unemployed residents in Ribble Valley at a rate of 2.7%. Despite unemployment having risen from 2.0% a year earlier (which may well be due to the effects of the pandemic), this remains much lower than the rate seen in Lancashire (3.9%), the North West (4.7%) and England (4.9%)<sup>15</sup>. It suggests that Ribble Valley is effectively at full employment (often suggested as being an unemployment figure at or below 3%).
- 3.9 Figure 3.2 shows the number of benefit claimants as a share of residents aged 16 – 64. This stood at 870 people 2.4% for Ribble Valley in August 2021, which is again much lower than across Lancashire (5.5%), the North West (5.8%) and England (5.3%)<sup>16</sup>. The claimant rate in

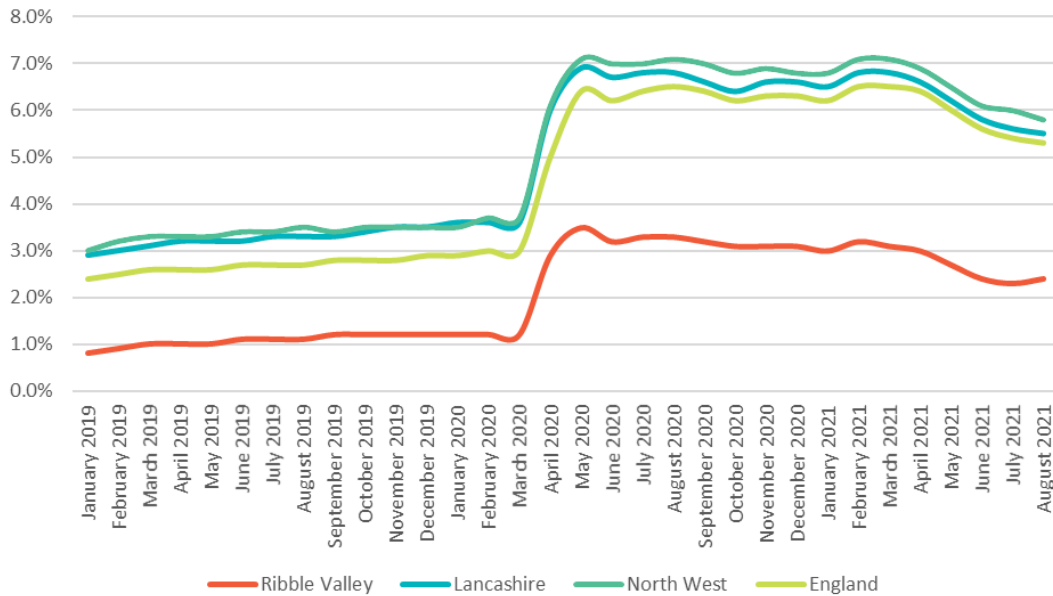
<sup>14</sup> ONS (2021): Annual Population Survey Apr 2020-Mar 2021

<sup>15</sup> Ibid

<sup>16</sup> ONS Claimant count by sex and age (August 2021)

Ribble Valley has generally been lower than the comparator areas since the start of 2019 and Ribble Valley experienced less of an increase in Q2 2020 than the comparator areas. However, whilst the number of claimants has already fallen from the May 2020 peak of 1,275 people (3.5%) it still remains around double pre-pandemic levels.

Figure 3.2 Claimant Count: % of residents aged 16-64

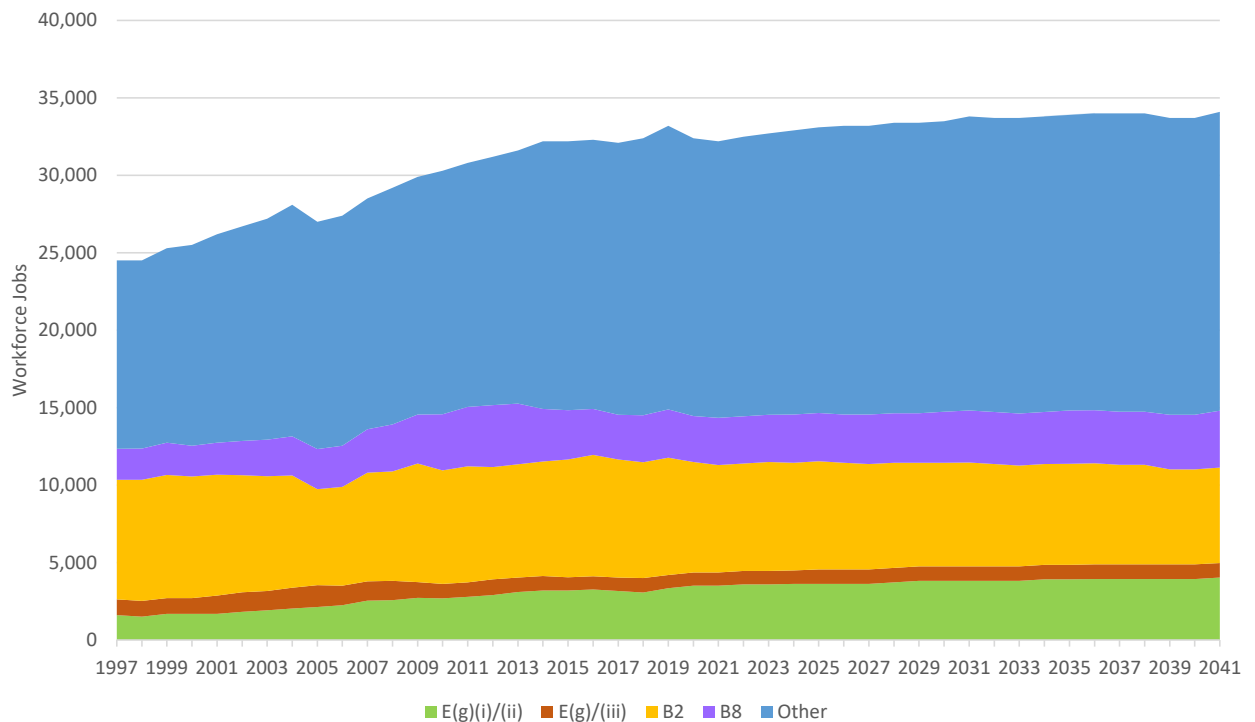


Source: ONS 2021: Claimant Count by sex and age

## Employment

- 3.10 The latest Experian data for June 2021 indicates that Ribble Valley has a total of 32,200 workforce jobs based in Ribble Valley in 2021, having grown by 7,700 jobs, or 31.4%, since 1997. This is a higher level of growth than was experienced across the North West (30.0%) and the UK (20.2%).
- 3.11 As shown in Figure 3.3, the majority of past and future job growth is in non B-Class sectors, so whilst 7,700 jobs were gained in this period 792 B2 class jobs were lost whilst B8 jobs increased by just 1,046. Meanwhile, Class E(g)(i)/(ii) jobs increased by 1,902, at a Compound Annual Growth Rate [CAGR] of 3.2%, whilst jobs in other use classes increased by 5,703 (at a CAGR of 1.6%). This reflects a restructuring of Ribble Valley’s economy away from manufacturing and the growing importance of office-based roles.
- 3.12 Going forward, class E(g)(i)/(ii) office/R&D jobs are projected by Experian to grow at a slower rate from 2021 to 2038, increasing by 438 or a CAGR of 0.6%, whilst Class E (g)(iii) light industrial jobs are projected to increase by just 78 (0.4% CAGR). In contrast, B2 general industrial employment is projected to continue to fall albeit at a slightly slower rate than previously, with a further decline of 407 jobs (a CAGR of -0.3%) whilst B8 warehousing jobs will increase at a slower rate of 386 (CAGR of 0.6%). Jobs in other Use classes are projected to increase by 1,305 over the period 2021-2038 (CAGR of 0.3%). This is driven by growth in Accommodation and Food Services (+500 jobs), and to a lesser extent Health (+300) and Education (+200). Overall, Ribble Valley’s economy is projected by Experian to grow by 1,800 jobs over the next 17 years.

Figure 3.3 Workforce Job Growth using the Experian June 2021 projections, by Use Class

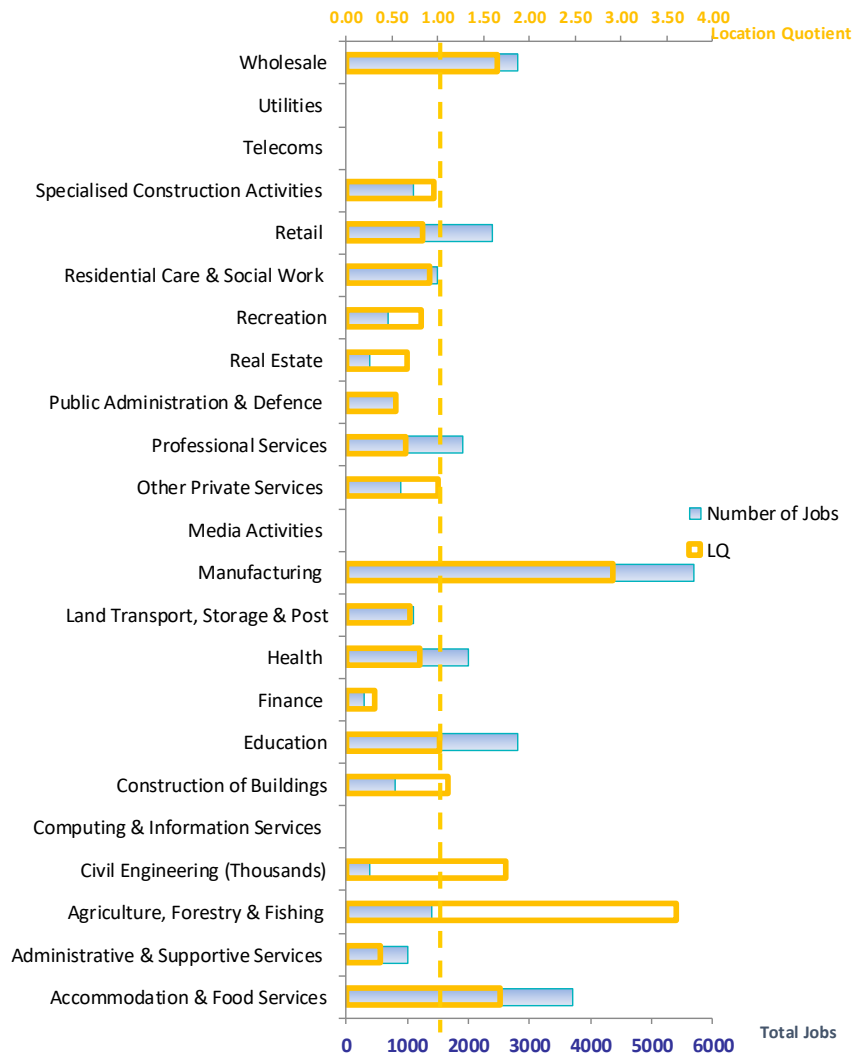


Source: Experian (June 2021) / Lichfields analysis

### Location Quotients

- 3.13 Whilst Government policy has focused on spatial-led growth models, there is an increasing need for, and shift towards, sector-based growth models.
- 3.14 In order to identify the full economic potential of Ribble Valley, it is important to understand which industrial sectors are best placed to drive future growth. This has been informed by an understanding of which sectors are under or over-represented in terms of local employment and their recent growth performance.
- 3.15 Figure 3.4 assesses Ribble Valley’s current sectoral strengths through the use of location quotients [LQs], which measure the proportion of employment in an industry at the local authority level relative to the regional average. In the graph, the location quotients are shown using an orange bar. A value above 1.0 denotes a higher local representation of a sector compared to the UK average, whilst anything below 1.0 signifies an under-representation. The further the orange bar is from 1.0, the greater the extent of any over or under-representation. In addition, the blue bars show the absolute level of employment accounted for by each sector.
- 3.16 Figure 3.4 indicates that (as of 2021) Ribble Valley has a very strong employment representation in Manufacturing (5,700 employed, with an LQ of 2.92%), Accommodation and Food (3,700 employed, with an LQ of 1.68), Wholesale (2,800 employed, with an LQ of 1.64), Agriculture (1,400 employed, with a very high LQ of 3.61), and to a lesser extent, Construction (800 employed with an LQ of 1.11) and Civil Engineering (only 400 employed, with a high LQ of 1.74). Retail, Professional Services and Education also employ high levels of workers in absolute terms.
- 3.17 Conversely, the chart also illustrates the generally low rate of employment in many white-collar service sectors with Professional Services, ICT and media under-represented when compared to the UK, alongside Utilities, Finance and Administration & Supportive Services.

Figure 3.4 Location Quotients of Economic Sectors in Ribble Valley, 2021



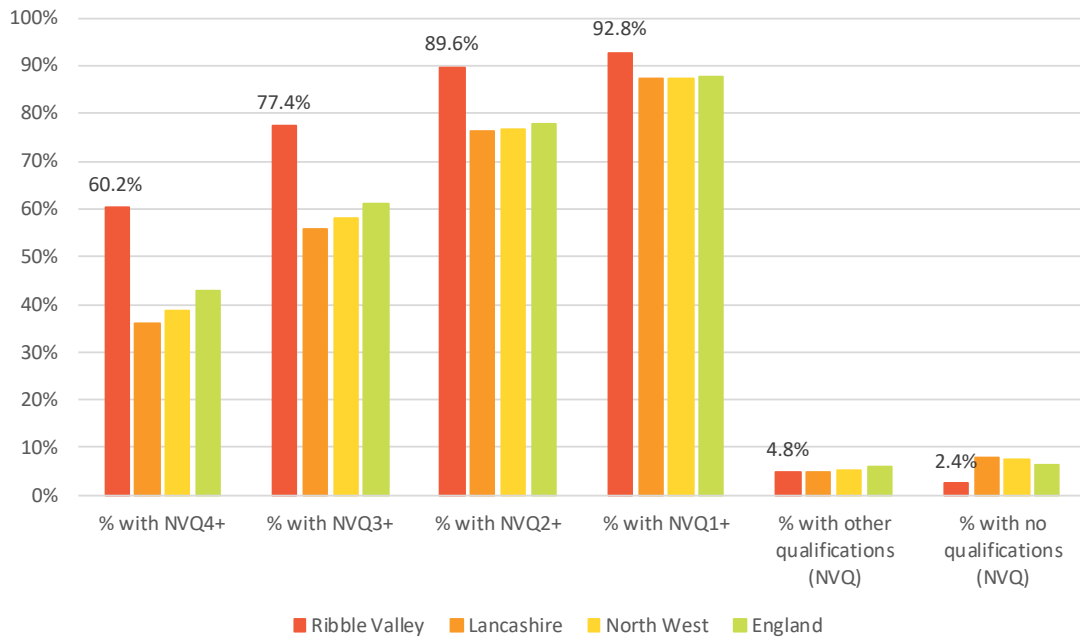
Source: Experian June 2021 / Lichfields analysis

### Skills and Qualifications

3.18 Figure 3.5 presents the qualification levels of residents ages 16 – 64 for Ribble Valley and the comparator areas. It indicates that Ribble Valley has a significantly more highly qualified workforce in comparison to the rest of Lancashire, the North West and England. 60.2% of Ribble Valley’s population aged 16 – 64 have qualifications of National Vocational Qualifications [NVQ] level 4 and above, compared to just 36.0%, 38.6% and 42.8% across Lancashire, the North West and England respectively. There is a similar difference for all levels of NVQ and similarly, just 2.4% of Ribble Valley’s residents aged 16 – 64 have no vocational qualifications compared to 7.8%, 7.6% and 6.2% across the comparator areas.

3.19 Residents lacking any formal qualifications often find it much more challenging to find a well-paid job and disproportionately end up either in menial occupations or remain outside of the job market altogether. For Ribble Valley, which has aspirations for strong growth in technical industries such as advanced manufacturing (which typically require higher level qualifications), a high proportion of well qualified local residents represents a clear opportunity in terms of maximising return on investment, enabling economic growth and boosting productivity in these key sectors.

Figure 3.5 Qualifications of those aged 16 - 64: Ribble Valley and Comparator Areas, Jan-Dec 2020



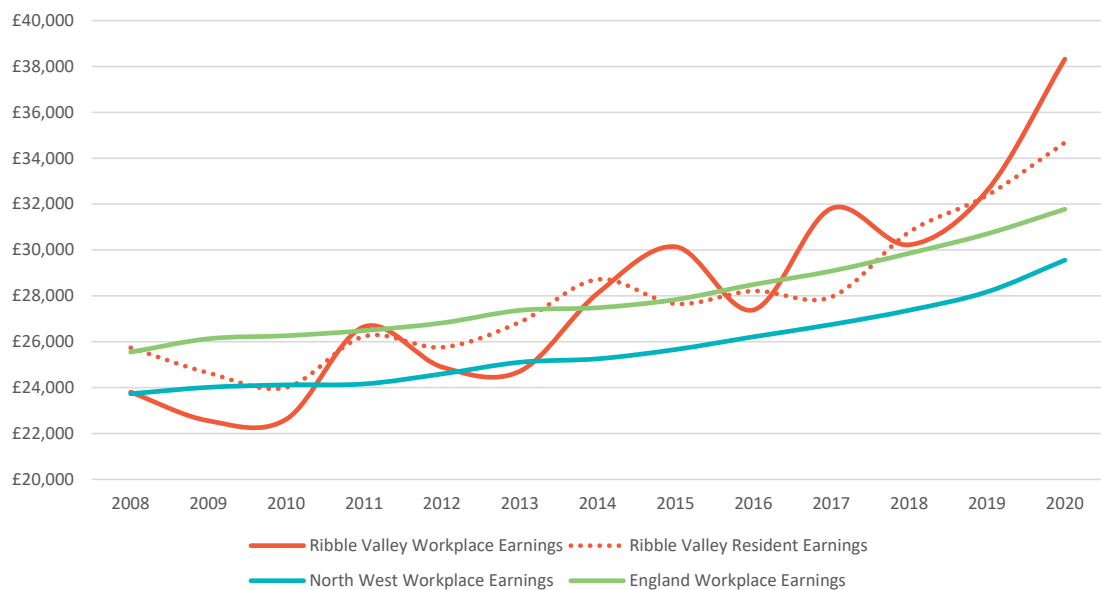
Source: ONS (2021): Annual Population Survey

### Earnings

3.20

Figure 3.6 compares changes in gross median annual earnings in Ribble Valley, the North West and England since 2008. Earnings in Ribble Valley have been relatively volatile since the financial crash but have consistently been above the regional and national levels since 2013. In 2020, workplace-based earnings in Ribble Valley stood at £38,326, having risen quite dramatically since 2018. This is much higher than the equivalent median for the North West and England, which stood at £29,558 and £31,777 respectively. Resident-based earnings are lower, at £34,688, but are still higher than the comparator areas.

Figure 3.6 Ribble Valley Resident and Workplace Gross Median Annual Earnings 2008-2020



Source: ONS (2021): Annual Survey of Hours and Earnings

## Business Demography

- 3.21 Table 3.1 summarises the business stock in Ribble Valley by employee size band and compares it to Lancashire, the North West and England. Ribble Valley has around 3,415 enterprises, 90.6% of which are micro businesses with fewer than 10 employees. This is a slightly higher share than seen across the comparator areas, although all show roughly 1 in 10 firms as being micro. 99.9% of firms within Ribble Valley have fewer than 250 employees, slightly lower than the 99.6% share seen across then comparator areas.

Table 3.1 Size of Enterprises (2020)

	Ribble Valley		Lancashire		North West	England
Total	3,415	100.0%	52,810	100.0%	100.0%	100.0%
Micro (0 to 9)	3,095	90.6%	46,505	88.1%	88.8%	89.7%
Small (10 to 49)	270	7.9%	5,175	9.8%	9.2%	8.4%
Medium-sized (50 to 249)	40	1.2%	935	1.8%	1.7%	1.5%
Large (250+)	5	0.1%	195	0.4%	0.4%	0.4%

Source: ONS (2021): Business Counts / Lichfields analysis

- 3.22 Table 3.2 shows Ribble Valley's business composition by industry compared to Lancashire, the North West and England. Generally, Ribble Valley has a much higher representation of firms in Agriculture, Forestry and Fishing than the comparator areas at 16.2% of all firms and has a relatively proportionate lower share of firms across other industries. As with the comparator areas, Ribble Valley also has high representation in Construction and Professional, Scientific and Technical industries, but has a lower than expected representation in Transportation and Storage, Retail and Business Administration and Support Services.

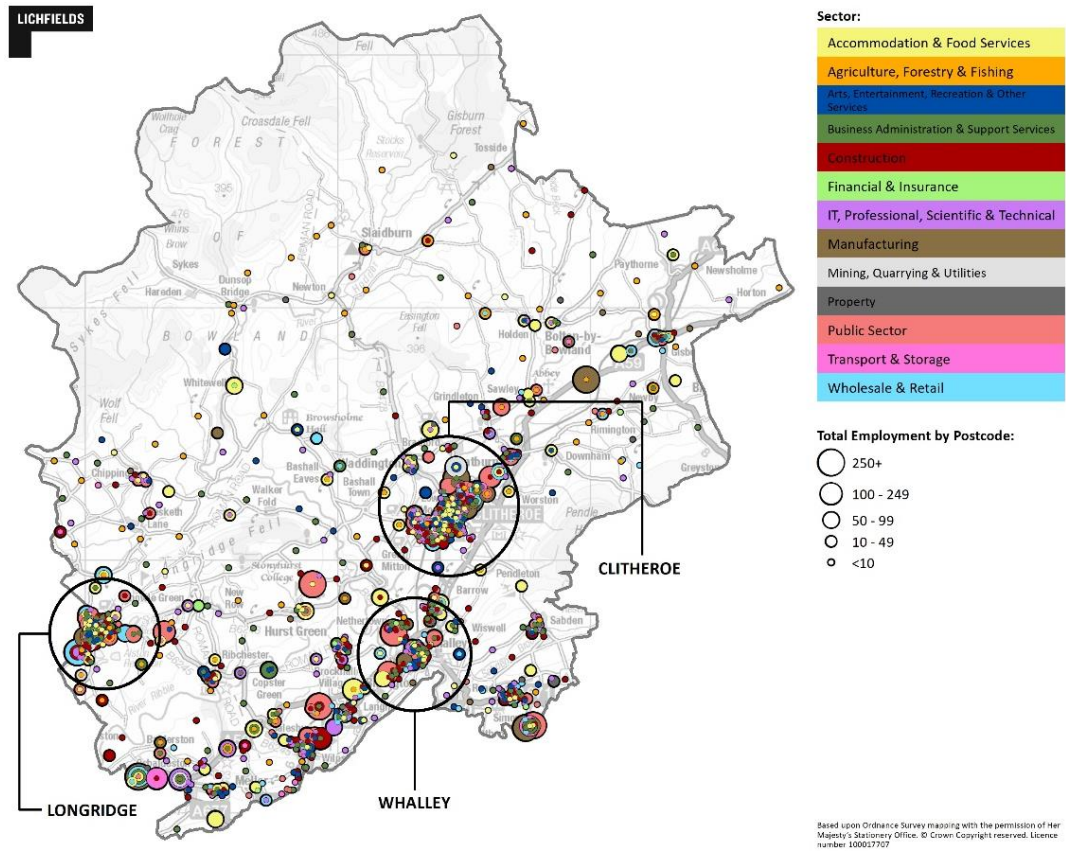
Table 3.2 Enterprises by Industry (2020)

	Ribble Valley		Lancashire	North West	England
Agriculture, forestry & fishing	550	16.1%	6.2%	4.4%	4.2%
Mining, quarrying & utilities	10	0.3%	0.5%	0.5%	0.5%
Manufacturing	195	5.7%	6.9%	5.6%	4.9%
Construction	385	11.3%	13.0%	11.8%	12.8%
Motor trades	105	3.1%	3.9%	3.1%	2.8%
Wholesale	165	4.8%	4.7%	4.2%	3.8%
Retail	270	7.9%	9.2%	9.2%	7.6%
Transport & storage	90	2.6%	4.7%	5.0%	4.6%
Accommodation & food services	220	6.4%	7.2%	6.6%	5.6%
Information & communication	140	4.1%	4.9%	5.9%	8.7%
Financial & insurance	70	2.0%	2.2%	2.8%	2.3%
Property	150	4.4%	3.6%	3.8%	3.8%
Professional, scientific & technical	445	13.0%	12.9%	16.0%	17.5%
Business administration & support services	235	6.9%	7.8%	8.7%	8.8%
Public administration & defence	15	0.4%	0.3%	0.2%	0.3%
Education	55	1.6%	1.5%	1.7%	1.7%
Health	110	3.2%	4.4%	4.3%	3.7%
Arts, entertainment, recreation & other services	205	6.0%	6.2%	6.3%	6.3%

Source: ONS (2021): UK Business Counts / Lichfields analysis

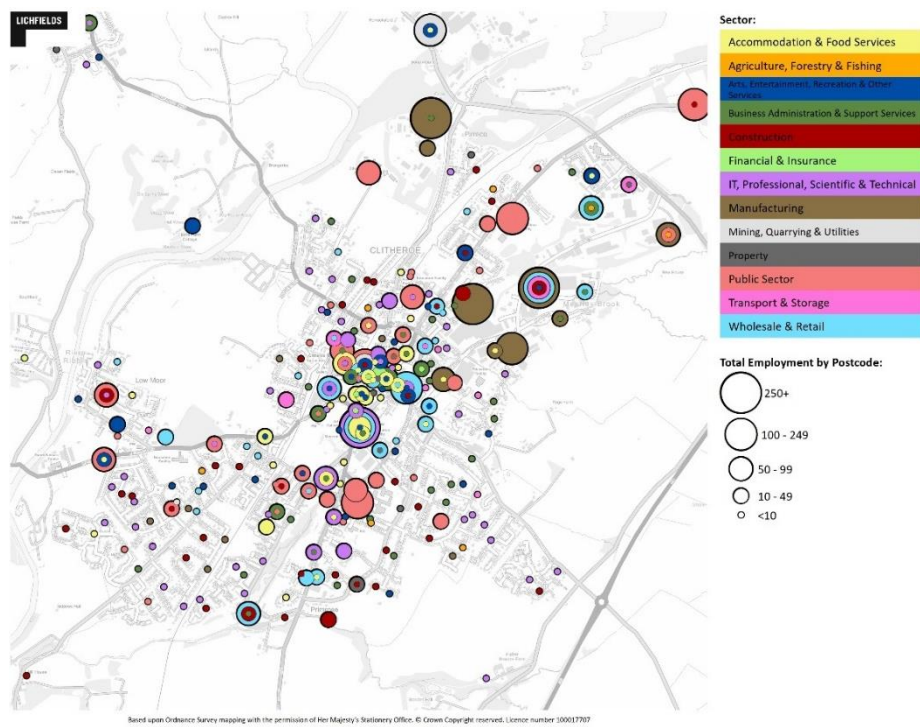
- 3.23 Figure 3.7 shows the spatial distribution of businesses within Ribble Valley. The strength of the A59 corridor as a business location is clear, with the main centres for employment being Clitheroe, Whalley and Longridge. The concentration of firms is also much higher in the south-western portion of the A59 corridor than it is to the north east of Clitheroe, likely due to being closer to the north-south links provided by the M6 and closer proximity to Preston and Blackburn.

Figure 3.7 Spatial distribution of enterprises by industry



Source: Inter Departmental Business Register (2021)

Figure 3.8 Spatial distribution of enterprises - Clitheroe



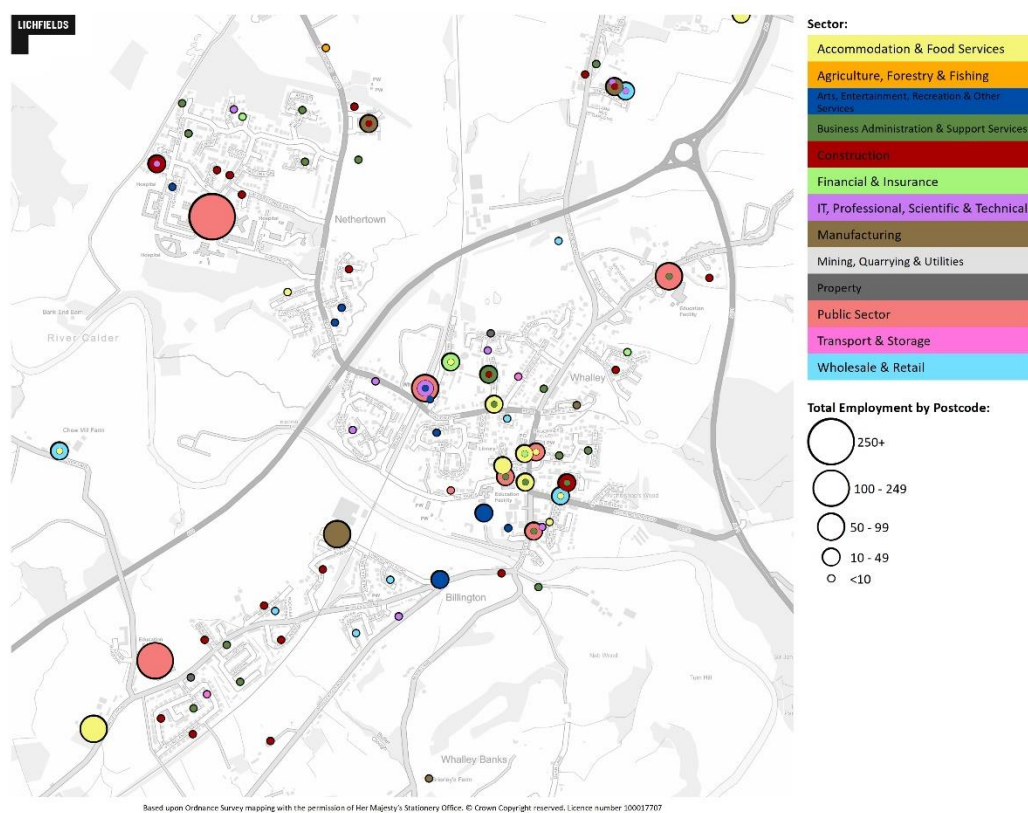
Source: Inter Departmental Business Register (2021)



3.24 Figure 3.8 displays the distribution of businesses in Clitheroe and highlights the Town’s role as the primary location for public sector employment in the Borough (including health and education). Clitheroe also has a relatively large presence of retail, hospitality and IT, professional scientific and technical firms. Certain areas to the north-east of Clitheroe are dominated by manufacturing, centred particularly around the various industrial estates along Lincoln Way and Salthill Quarry.

3.25 Figure 3.9 displays the distribution of businesses in Whalley. Public sector employment is visible particularly at Queen Marys Military Hospital and local schools. Alongside the typical retail and hospitality uses there is also a clear presence of smaller business support and construction firms throughout, with many of these located in predominantly residential areas.

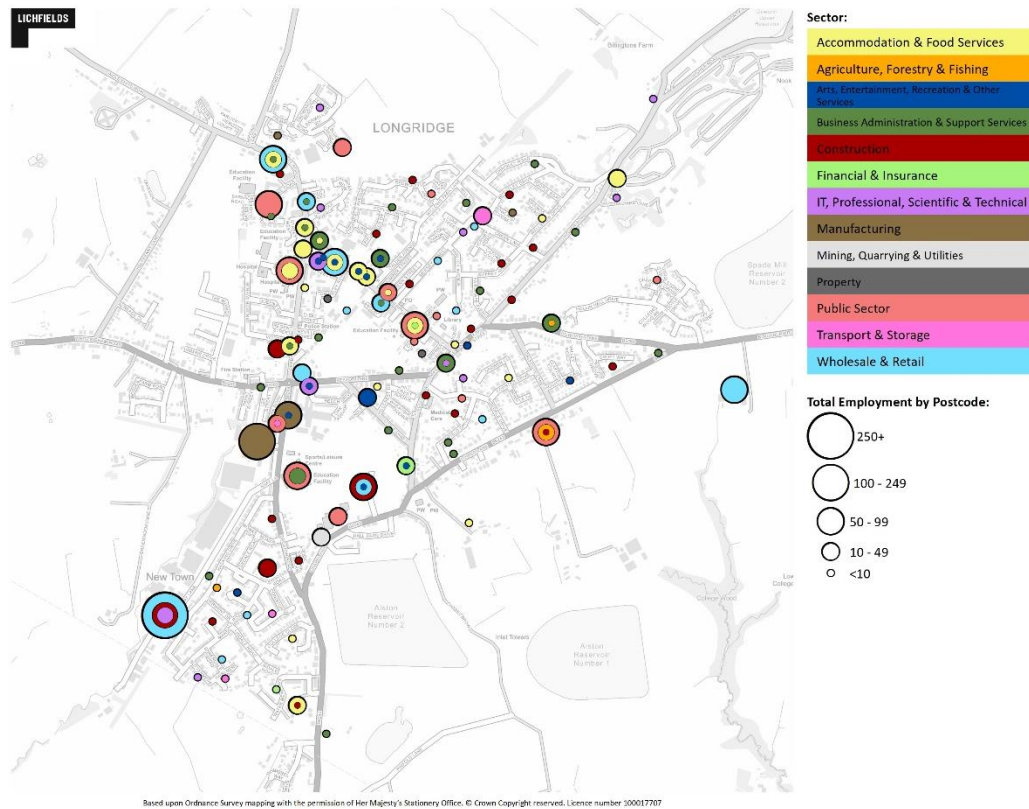
Figure 3.9 Spatial distribution of enterprises - Whalley



Source: Inter Departmental Business Register (2021)

3.26 Figure 3.10 displays the distribution of businesses in Longridge. There is a central cluster of hospitality and retail firms alongside some visible out-of-centre retail/wholesale employment. As with Whalley, there are a large range of small firms located in predominantly residential areas. There are also a handful of manufacturing firms located along the B6244.

Figure 3.10 Spatial distribution of enterprises - Longridge



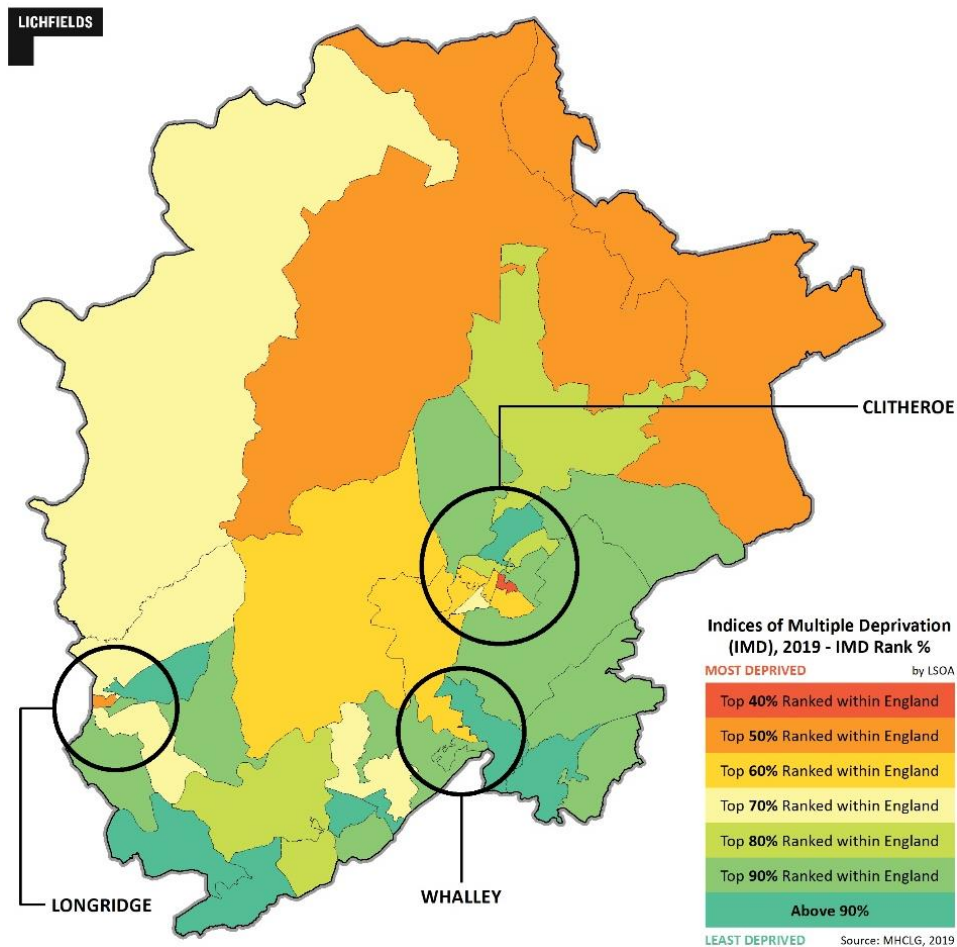
Source: Inter Departmental Business Register (2021)

## Deprivation

- 3.27 Deprivation at a local level is measured by the Indices of Multiple Deprivation [IMD], which uses a number of datasets to rank areas across seven sub-domains of deprivation that range from access to health services to income levels<sup>17</sup>. These categories are combined to produce an overall deprivation rank for each local authority in England. The IMD 2019 identifies that out of all 317 local authorities in England, Ribble Valley is ranked as being the 35<sup>th</sup> least deprived (based on ‘rank of average rank’), ranking among the 11% least deprived authorities nationally. Indeed, **it is ranked as the least deprived district in the whole of northern England.**
- 3.28 Figure 3.11 shows deprivation across Ribble Valley by Lower-Layer Super Output Area [LSOA]. Ribble Valley has relatively little deprivation overall, with the most deprived area being a small area in central Clitheroe which falls within the 40% most deprived nationally. There is also a small area in Longridge falling within the 50% most deprived areas nationally alongside much of the northern rural part of Ribble Valley.

<sup>17</sup> Ministry of Housing, Communities and Local Government (MHCLG), Indices of Multiple Deprivation (2019)

Figure 3.11 Deprivation in Ribble Valley, 2019



Source: MHCLG (2020): Index of Multiple Deprivation 2019

## Functional Economic Market Area

- 3.29 The PPG provides advice on how a FEMA can be defined. It states that they can overlap several administrative areas so strategic policy-making authorities may have to carry out assessments of need on a cross-boundary basis with neighbouring authorities within their FEMA<sup>18</sup>.
- 3.30 The PPG<sup>19</sup> goes on to state that since patterns of economic activity vary from place to place, there is no standard approach to defining a FEMA. However, FEMAs can be defined by taking account of factors including travel to work areas and housing market areas, and specifically:
- the extent of any LEP within the area;
  - travel to work areas;
  - housing market area;
  - flow of goods, services and information within the local economy;
  - service market for consumers;
  - administrative area;
  - catchment areas of facilities providing cultural and social well-being; and,

<sup>18</sup> PPG Reference ID: 2a-025-20190220

<sup>19</sup> PPG Reference ID: 61-019-20190315

- transport network.

- 3-31 More detailed guidance on how to define a FEMA is provided by the government<sup>20</sup>. This states that examining commuting flows can help to define the FEMA of an economy. These commuting flows can be assessed using the latest travel-to-work flow data from the 2011 Census.
- 3-32 The ONS defines labour market areas as those areas where the bulk of the resident population also work. Defining labour market areas requires an analysis of commuting patterns to identify Travel to Work Areas [TTWAs] for local economies. The current criteria for defining TTWAs is that at least 75% of an area's working population work in the area and at least 75% of the people who work in the area also live in the area. The area must also have a working population of at least 3,500 (Ribble Valley has a working population of around 36,000). However, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted to define a TTWA as part of a limited "trade-off" between workforce size and level of self-containment<sup>21</sup>.
- 3-33 The extent of Ribble Valley's Functional Economic Market Area has been assessed in detail by Turley as part of its Economic Evidence Base Baseline Report, produced on behalf of the Council in May 2018.
- 3-34 The report notes that Ribble Valley forms part of the Lancashire LEP, which extends to cover the whole county including the unitary authorities of Blackpool and Blackburn with Darwen. Craven is the only neighbouring authority which falls within a different LEP geography.
- 3-35 Regarding Travel to Work Areas [TTWAs], Ribble Valley is predominantly located in the Blackburn TTWA alongside Blackburn with Darwen Borough; Hyndburn Borough and Rossendale Borough further south (see Figure 3.12 below). The eastern part of Ribble Valley Borough, including the settlement of Longridge, is identified as being within the Preston TTWA, which includes the Lancashire Boroughs of Wyre, some of Fylde, Preston, South Ribble, Chorley and some of West Lancashire.
- 3-36 The Ribble Valley Economic Evidence Base Baseline Report noted that based on the 2011 Census, around 43% of Ribble Valley's employed residents worked in Ribble Valley, with Blackburn with Darwen representing the main commuting destination, followed by Preston and Hyndburn. Meanwhile, Ribble Valley residents account for 41% of the Ribble Valley's workforce. Neighbouring Blackburn with Darwen, Hyndburn and Preston collectively accommodated almost a quarter (24%) of those working in Ribble Valley in 2011<sup>22</sup>.

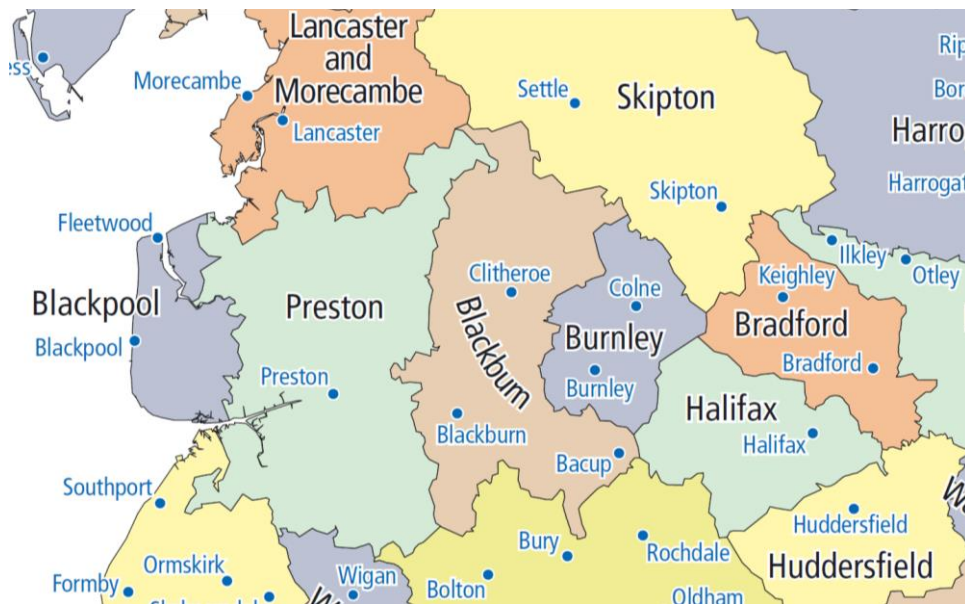
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<sup>20</sup> CLG (2010) Functional Economic Market Areas: An Economic Note

<sup>21</sup> Commuting to work, Changes to Travel to Work Areas: 2001 to 2011 (ONS, December 2015)

<sup>22</sup> Turley (2018): Ribble Valley Economic Evidence Base Baseline Report, paragraphs 3.16-3.17

Figure 3.12 TTWAs, 2011



Source: ONS 2015 / 2011 Census

3-37 In terms of the limits of Ribble Valley’s Housing Market Area, Turley noted that neighbouring authorities have not included Ribble Valley within the housing market area definitions since it was established in separately-commissioned evidence.

3-38 Turley’s Economic Evidence Base Baseline Report concludes that the economy of Ribble Valley is influenced by surrounding areas, and **Ribble Valley therefore cannot therefore be considered to operate as a self-contained functional economic geography**. In defining an appropriate FEMA for Ribble Valley, Turley summarised existing definitions established through neighbouring authorities’ evidence. In summary:

- **Preston and South Ribble** – as well as Chorley – form part of the Central Lancashire FEMA defined through the joint Employment Land Study. The study concludes that this FEMA also extends to include the Fylde Coast authorities of Blackpool, Fylde and Wyre, given their strong links to Preston via the M55 and A583. Additionally, it notes that ‘*Blackburn with Darwen and Ribble Valley...fall within the economic catchment area of Preston*’, although this is found to be partially reflective of movements within Longridge which is located at the authority boundary;
- Evidence commissioned for **Wyre** concluded that the Borough ‘*forms part of a larger travel-to-work area, which includes Fylde and Blackpool*’ given that 86% of residents live and work in the Fylde Coasts<sup>81</sup>;
- **Hyndburn** demonstrates relatively low levels of self-containment, although 84% of its residents work within Pennine Lancashire. This geography was therefore defined as the appropriate FEMA for the borough, extending to incorporate the local authority areas of Blackburn with Darwen, Burnley, Ribble Valley, Rossendale and Pendle;
- **Burnley** does not represent a FEMA in isolation, but can be described as a self-contained geography when grouped with neighbouring Pendle. Across this combined area, residents account for 73% of the combined workforce, and 68% of residents work within one of the two authorities; and

- Evidence documents independently commissioned for **Lancaster, Pendle** and **Blackburn with Darwen** do not explicitly define a FEMA, with the geographic scope of their analysis limited to individual authority areas.

3.39 The Turley’s report goes on to state that:

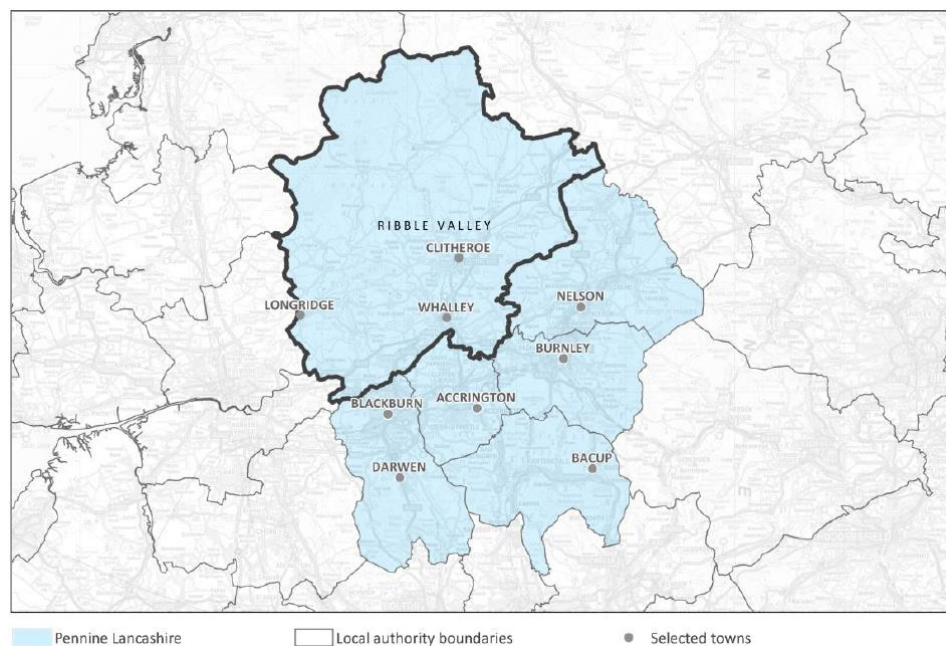
*“There is evidently some overlap between the FEMAs defined by neighbouring authorities, most notably in Central Lancashire and Pennine Lancashire. These strategic geographies evidently contain groups of authorities which collectively operate as relatively distinct and self-contained economies. For example, Burnley and Pendle represent a relatively distinct local economy – and indeed form the basis of a TTWA defined by Government – within the wider geography of Pennine Lancashire.*

*The economic relationship between Ribble Valley and Preston has been acknowledged within the latter’s evidence and is also shown through the commuting analysis presented in this section. This influence is stronger in western parts of the borough, however, with other areas – and indeed the borough as a whole – sharing a stronger relationship to the south with Blackburn when considering commuting patterns and transport connections. Both Ribble Valley and Blackburn with Darwen form part of Pennine Lancashire, which is an established group of six authorities and indeed forms the basis for the FEMA defined for neighbouring Hyndburn.*

*On this basis, **Pennine Lancashire is considered to represent an appropriate FEMA for Ribble Valley.** In total, this geography accommodated over two thirds (68%) of the borough’s workforce at the 2011 Census and covers an area in which 72% of its employed residents work. It will, however, remain important for the Council to also consider its economic relationship with the Central Lancashire authorities, and Preston in particular.”* [paragraphs 3.28 to 3.30]

3.40 Turley’s FEMA therefore includes Ribble Valley alongside the other Pennine Lancashire Boroughs of Pendle, Hyndburn, Burnley, Blackburn with Darwen and Rossendale:

Figure 3.13 Turley FEMA for Ribble Valley



Source: Turley (2018): Ribble Valley Economic Evidence Base Baseline Report, Figure 3.4

## Summary FEMA

- 3.41 From a FEMA perspective, Ribble Valley’s commercial property market likely extends southwards into the other Pennine Lancashire authorities beyond, which have relatively significant inter-relationships with Ribble Valley across a number of key economic indicators.
- 3.42 In light of the inevitably nebulous nature of FEMA, it is helpful for LPAs to identify a pragmatic and logical ‘best fit’ with these various areas within the context of establishing Local Plan evidence and for the purposes of developing policy. Economic development needs have been assessed within this ELNS for the local authority area of Ribble Valley in order to inform the Council’s emerging Local Plan, although the importance of flows of labour, residents and businesses and the resultant inter-relationships between the other districts across Pennine Lancashire should be recognised and used to inform planning policy under the Duty to Co-operate.
- 3.43 In this regard, it is worth noting that the Council’s HED DPD, which was adopted in October 2019, based its economic growth strategy (and the need for new employment allocations) on evidence contained within BE Group’s 2013 Employment Land Study refresh, which identified employment land needs (and supply) for Ribble Valley alone<sup>23</sup>.
- 3.44 The Inspector examining the HED DPD noted that the additional allocations of this Plan are designed to meet residual employment land requirements and have been measured against the overall requirement and spatial distribution set out in the CS. **He therefore agreed with the approach taken by the Council (i.e. meeting its own economic growth needs in full within its own boundaries**, plus a modest level of over-provision equal to 1.6 ha), stating that *“against this background, I conclude that the Council’s strategy for accommodating economic development is sound and justified, and the economic development policies of the Plan are consistent with, and positively promote, the visions, objectives and spatial policies contained within the CS.”*<sup>24</sup>
- 3.45 Nevertheless, the FEMA analysis suggests that close working with the other five Pennine Lancashire districts will be critical in order to plan to effectively meet Ribble Valley’s wider economic development and growth needs over the plan period. Furthermore, the aerospace and advanced manufacturing businesses located at Samlesbury EZ which crosses the border into South Ribble, have particularly strong relationships with the Ribble Valley and the site clearly plays a key role in the Ribble Valley’s future economic growth prospects.
- 3.46 We have discussed employment land issues in detail with Officers representing the adjoining LPAs to Ribble Valley and the other Pennine Lancashire districts that comprise the FEMA (all of whom have progressed their own economic evidence bases as set out above). Their responses are set out in Section 6.0.

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<sup>23</sup> Albeit having consulted with the adjoining Ribble Valleys under the Duty to Co-operate and concluded that with the exception of South Ribble, the other districts had few direct links with Ribble Valley. South Ribble itself concluded that the Samlesbury Enterprise Zone will be a sub-regional/regional scheme with benefits that are dispersed across Lancashire and the North West.

<sup>24</sup> Inspector’s Report on the Examination of the Ribble Valley Local Plan, Housing and Economic Development, Development Plan Document (10<sup>th</sup> September 2019), paragraph 46

## 4.0 Implications of Covid-19 on Future Growth scenarios

### Macro-Economic Trends

- 4.1 Macro-economic trends have a critical influence on the future performance of Ribble Valley’s economy. These shape the level of demand for the sale of goods and services. In turn this affects business formation and survival, investment decisions, recruitment, wages and productivity.
- 4.2 The outbreak of Covid-19 and resulting pandemic has developed rapidly with far reaching impacts on the economy and business across the country. Lockdown measures have led to unprecedented shutdowns of large parts of the economy simultaneously, with effects being transmitted rapidly across all sectors.
- 4.3 As seen in Figure 4.1, UK Gross Domestic Product [GDP] fell by 20.4% in Q2 2020, meaning the UK entered a technical recession. This was the largest fall since monthly records began in 1997, reflecting record widespread falls in services, production and construction output as the negative impacts of social distancing and lockdown kicked in. After six consecutive monthly increases, GDP fell again in October and December of 2020 in reaction to the second period of lockdown before recovering again to June of 2021. GDP grew by 0.4% in August 2021 marking after a fall of 0.1% in July and remains 0.8% below its pre-pandemic level (February 2020). Individually, all sectors remain at around below their February 2020 pre-pandemic level of output, ranging from -0.6% in services to -2.4% in Manufacturing.

Figure 4.1 GDP Monthly index, July 2007 to August 2021

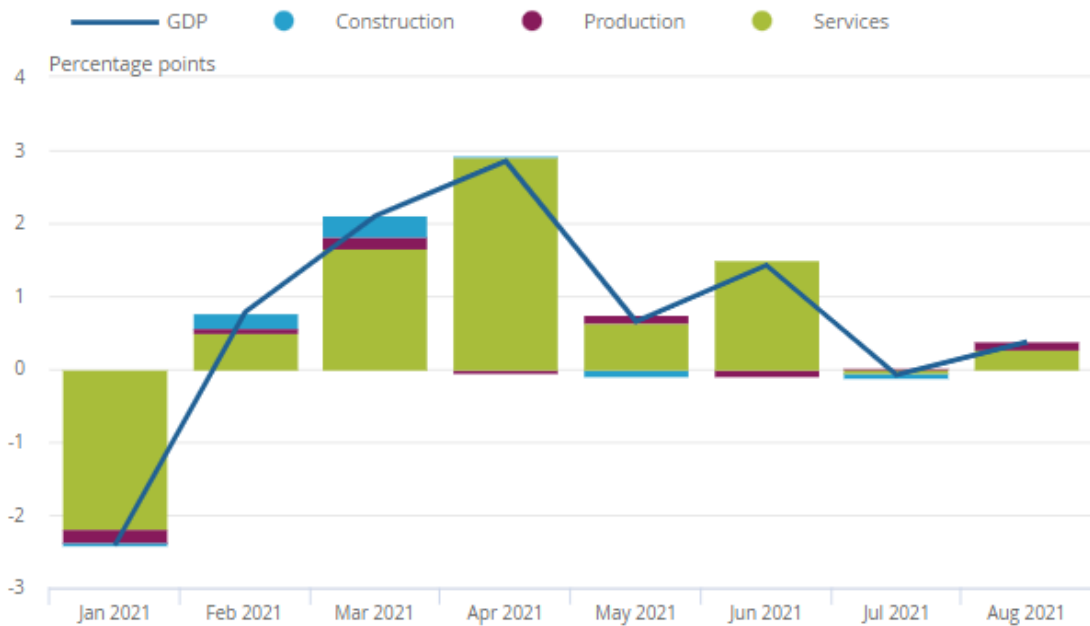


Source: ONS Monthly Estimate of GDP August 2021 (Released October 2021)

- 4.4 Overall, GDP grew by 2.9% in the 3 months to August 2021. The services sector was the main contributor to growth at +0.4% in August which reflects the continuing reopening of accommodation, food services and non-essential stores.



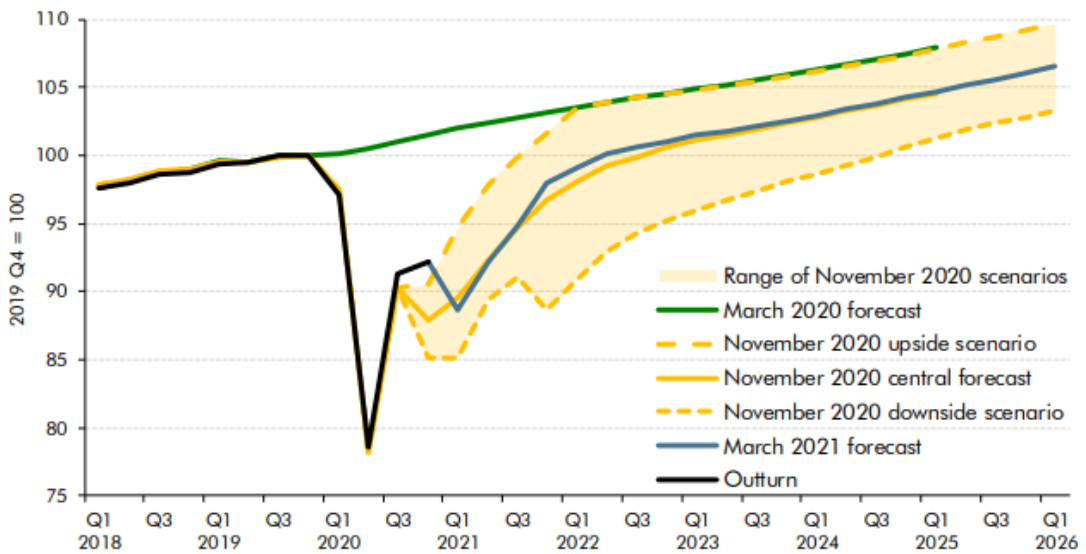
Figure 4.2 Contributions to monthly GDP growth, January - August 2021



Source: ONS Monthly estimate of GDP (September 2021)

- 4.5 The Office for Budget Responsibility’s [OBR’s] March 2021 economic forecast is in line with the Government’s Roadmap for exiting the pandemic, which envisages the removal of restrictions through late June and assumes a rapid rollout of vaccines, enabling the economy to recover more quickly. It also assumes greater clarity over the implications of Brexit and growing business and consumer confidence over the medium-term. This was broadly borne out by the Government ending the vast majority of lockdown restrictions on 19<sup>th</sup> July 2021.
- 4.6 The OBR forecasts an initial boost to the economy following the end of restrictions in June whilst recovery slows towards the end of 2021, being dampened by winter. Beyond March 2022 it is anticipated that the lingering effects of the virus will be felt predominantly through supply-side capacity as well as a reduction in population forecasts due to falls in net migration. The OBR therefore concludes that the pandemic will lower output in the medium term by around 3% compared to the pre-pandemic path, with GDP returning to pre-pandemic levels towards the end of 2022. However, it is important to note that under the latest OBR projections, the March 2020 projection of growth is never returned to. Therefore, while we get back to pre-pandemic levels of GDP eventually, the estimated trend from March 2020 is never reached and there will be permanent ‘scarring’ of the economy.

Figure 4.3 Medium-term economic outlook: Real GDP forecast and scenarios

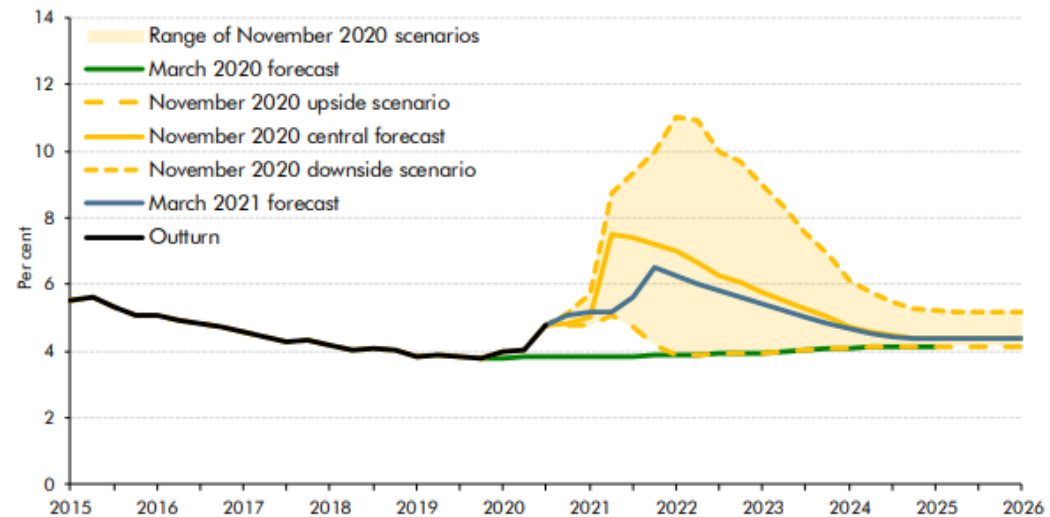


Source: OBR (2021): Economic and Fiscal Outlook March 2021

4.7

The OBR also predicts that this faster recovery in output, alongside the extension to the Coronavirus Job Retention Scheme [CJRS] and the package of fiscal support announced in the Budget, will help to limit the rise in unemployment to levels below those previously forecast in November 2020. Unemployment is anticipated to rise to a peak of 6.5% or 22 million by the end of 2021, equating to a rise of 490,000 over the year. This is, however, 340,000 fewer than forecast in November 2020.

Figure 4.4 Medium-term economic outlook: Unemployment Rate



Source: OBR (2021): Economic and Fiscal Outlook March 2021

4.8

The spread of Covid and slow growth over the past 18 or so months has kept inflation low following the initial lockdown measures, with CPI inflation reaching 0.5% in Q4 2020. The vaccine rollout and associated easing of restrictions have seen inflation rise by 0.7% in April 2021 following a rise of 0.2% in March, contributing to a total rise of 1.6% in the 12 months to April. The Bank of England forecasts that inflation will return to the 2% target in Q3 2021 and should not go much beyond this before settling. The OBR on the other hand considers that

inflation will rise to just below 2% throughout 2022 being subdued by low wage growth as a result of high unemployment, whilst it will rise gradually back to target by 2025.

- 4.9 However, OBR's projection was last updated in May 2021 and since that time inflation has increased well above forecasts due to a combination of a stronger than expected recovery in Summer/Autumn 2021, labour shortages in many key sectors, and soaring petrol and gas prices. As a result, the Bank of England's new chief economist warned in October 2021 that UK inflation is likely to rise close to or even slightly above 5% early next year<sup>25</sup>.

## **Implications of Covid-19 on Future Growth and new Ways of Working**

- 4.10 The ongoing Covid pandemic will continue to have significant impacts on the economy and businesses, with impacts varying dependent on the employment sector and the nature of the post-Covid recovery. Coupled with the considerable economic uncertainty over the longer-term impact of Brexit, Lichfields considers that future growth projections could be subject to significant change.
- 4.11 The most recent macro-economic forecasts for the Borough were released by Experian at the end of April 2021. These include a base case 'delayed V-shaped' recovery scenario which provide a revised view on the areas of future economic growth across the country. The forecasts assume that the recovery will follow a delayed-V shape, with a substantial drop in output in Q2 2020 as economic activity was highly restricted due to lockdown measures to contain the virus.
- 4.12 Though viewed as a temporary shock, the forecasts imply a significant impact on almost all sectors of the economy. Although there are continued uncertainties regarding the economic recovery profile of the country, it is important that reliable and robust datasets are utilised to underpin the ELRU. The Experian forecasts remain a valuable input in respect of understanding future land needs by indicating the broad scale and direction of economic growth in different sectors.
- 4.13 A further implication of the ongoing Covid pandemic is a shift in working patterns following the Government's advice to work from home if possible. The prevalence of this type of working had historically been rising, with the 2015 HCA Employment Guidance noting that 2014 ONS data indicated that almost 14% of the workforce worked from home at least some of the time, up from 11% in 1998. However, the pandemic has (at least temporarily), increased this to a peak of around 30% across the UK, although this has been falling as we move towards an end of lockdown in July 2021.
- 4.14 At the time of writing (November 2021), it remains unclear as to whether the current shift in working patterns will transform into a longer term change in people's willingness to commute to offices in far off towns and cities on a daily basis. At present the extant 2015 HCA Employment Density Guidance note provides employment densities associated with different types of property use, and it has been found to be robust as a rule of thumb guide to employment land densities underpinning numerous ELRs across the country. As a part of this, an element of home working and 'hot-desking' is already factored into the employment densities, although nowhere near current levels. This will have an important impact on Ribble Valley's office market as we go forward, and it will be vital that the Council is as flexible as possible when it comes to bringing forward more complex brownfield sites for commercial development.

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<sup>25</sup> <https://www.ft.com/content/bce7b1c5-0272-480f-8630-85c477e7d69c>

## 5.0 Commercial Market Property Signals

5.1 The section then provides an overview of the property market from a national and local perspective. It examines the key office and industrial employment locations across the study area and provides a view on rents and land values. This has been informed by a review of market trends and secondary data, as well as consultations with a number of stakeholders such as commercial agents and developers active in the area.

5.2 This analysis uses data from the following sources:

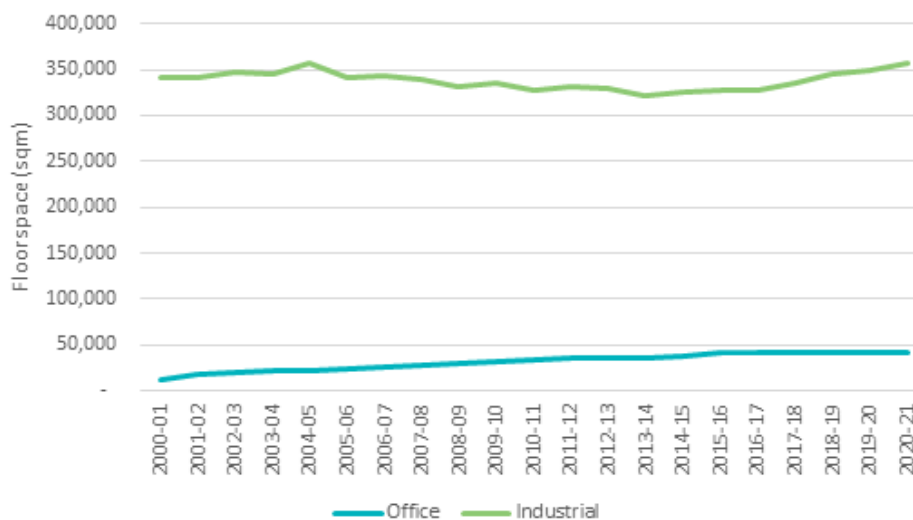
- 1 Commercial floorspace data from the ONS and various datasets from the Valuation Office Agency [VOA];
- 2 Monitoring data on commercial space from the Council;
- 3 EGi Property Link database and other commercial property sources;
- 4 The results of a business survey sent to all contacts on the Council’s databases in September-October 2021; and,
- 5 Discussions with a number of local agents, Council Officers and other stakeholders in October-November 2021.

## Employment Space

### Floorspace Trends

5.3 In total, Ribble Valley has approximately 400,000 sqm of employment floorspace, of which approximately 89.5% is factories/warehouses and 10.5% offices. Figure 5.1 shows that over the period 2000/01 to 2020/21, commercial office space in Ribble Valley increased by 250% to approximately 30,000 sqm. In comparison, the increase across Lancashire as a whole was 20.6%. Over the same period, the total amount of industrial floorspace increased by 4.4%, to approximately 357,000 sqm compared with a decrease of 5.2% across Lancashire as a whole. The amount of industrial floorspace in Ribble Valley actually fell from a peak of 356,000 sqm in 2004/05 to a low of 322,000 in 2013/14, before returning to growth and only surmounting this previous peak in 2020/21. This indicates a resurgence in the demand for industrial floorspace of the past decade in particular, even as office jobs grow in relative importance.

Figure 5.1 Stock of Employment Space (2000/01 to 2020/21)



Source: Valuation Office Agency (2021): NDR Floorspace Tables

5.4 Table 5.1 shows these changes in more detail. It is notable that whilst the amount of floorspace has increased by 250% since 2000, this is because Ribble Valley had just 12,000 sqm of office space to begin with. Also, that Ribble Valley has seen an increase in the amount of industrial floorspace is significant given the falls seen across the comparator areas, and further indicate the strengthening market for industrial floorspace within Ribble Valley.

Table 5.1 Employment Floorspace Growth

	Offices			Industrial		
	Floorspace (sqm) (2020)	Absolute Change (2000-2020)	% Change (2000-2020)	Floorspace (sqm) (2020)	Absolute Change (2000-2020)	% Change (2000-2020)
<b>Ribble Valley</b>	<b>42,000</b>	<b>30,000</b>	<b>250.0%</b>	<b>357,000</b>	<b>15,000</b>	<b>4.4%</b>
Lancashire	1,269,000	217,000	20.6%	9,318,000	-509,000	-5.2%
North West	10,263,000	1,500,000	17.1%	49,886,000	-6,743,000	-11.9%
England	83,009,000	6,127,000	8.0%	314,496,000	-11,038,000	-3.4%

Source: Valuation Office Agency (2021): NDR Floorspace Tables

### Quality of Employment Stock

5.5 CoStar’s star rating system uses market-tested criteria which allows for analysis of the quality of existing office and industrial stock. CoStar’s criteria takes account of architectural design, structures/systems, amenities, site/landscaping/exterior, and certifications.

5.6 Table 5.2 presents the star ratings of the existing employment stock in Ribble Valley. Across office, industrial and logistics space, Ribble Valley has a much higher share of relatively low quality (1 or 2 star) floorspace when compared to the North West more generally. Notably, there are just 2 properties rated as either 4 or 5 star quality in Ribble Valley; an industrial unit at Twin Brooks Business Park built in 2019 and a warehouse within the BAE site at Samlesbury built in 2010.

Table 5.2 Quality of Existing Employment Stock

	Properties			Floorspace		
	#	% of Total	North West %	Sqm	% of Total	North West %
<b>Office</b>						
1-2 Stars	31	67.4%	55.8%	11,780	61.1%	28.4%
3 Stars	15	32.6%	44.2%	7,505	38.9%	71.6%
4-5 Stars	0	0.0%	2.7%	0	0.0%	21.8%
Total	46	100.0%	100.0%	19,285	100.0%	100.0%
<b>General &amp; Light Industrial</b>						
1-2 Stars	25	50.0%	59.5%	54,132	29.5%	30.9%
3 Stars	24	48.0%	40.5%	125,899	68.6%	69.1%
4-5 Stars	1	2.0%	0.5%	3,530	1.9%	4.0%
Total	50	100.0%	100.0%	183,561	100.0%	100.0%
<b>Storage &amp; Distribution</b>						
1-2 Stars	11	55.0%	36.4%	20,697	27.1%	25.3%
3 Stars	8	40.0%	63.6%	36,578	47.9%	74.7%
4-5 Stars	1	5.0%	2.8%	19,084	25.0%	12.7%
Total	20	100.0%	100.0%	76,359	100.0%	100.0%
Grand Total	116			279,205		

Source: CoStar (Accessed September 2021) / Lichfields analysis

### Floorspace Availability

5.7 Table 5.3 presents the total and available amount of floorspace in Ribble Valley as of September 2021, as well as current and 10-year average vacancy rates. It indicates that all types of

floorspace have current vacancy rates below that of the 10-year average, with office and industrial units having 4.5% and 5.1% vacancy respectively. Across the Borough there was just 288 sqm of storage and distribution floorspace available at a vacancy rate of just 0.4% against a 10-year average of 11.6%.

Table 5.3 Floorspace Availability in Ribble Valley as of September 2021

	Total Floorspace (sqm)	Available Floorspace (sqm)	Current Vacancy Rate	Average Vacancy Rate 2011 - 2021
Office	19,285	876	4.5%	5.0%
General & Light Industrial	183,561	9,329	5.1%	7.7%
Storage & distribution	76,359	288	0.4%	11.6%

Source: CoStar (Accessed December 2021) / Lichfields analysis

- 5.8 When set against the 10-year average levels of take-up as in Table 5.4, this equates to just 0.23 years' worth (less than 3 months) of supply for office and 0.18 years' supply for industrial space if current levels of take-up persist. Whilst it has the lowest current rate of vacancy, slower average take-up of storage and distribution space means there is currently around 1.27 years of supply currently available.

Table 5.4 Average Annual Take-Up and Years of Available Supply (sqm)

	Average Annual Take-Up 2011 -21	Available Floorspace	# Years Supply
Office	198	876	0.23
General & Light Industrial	1,699	9,329	0.18
Storage & distribution	365	288	1.27

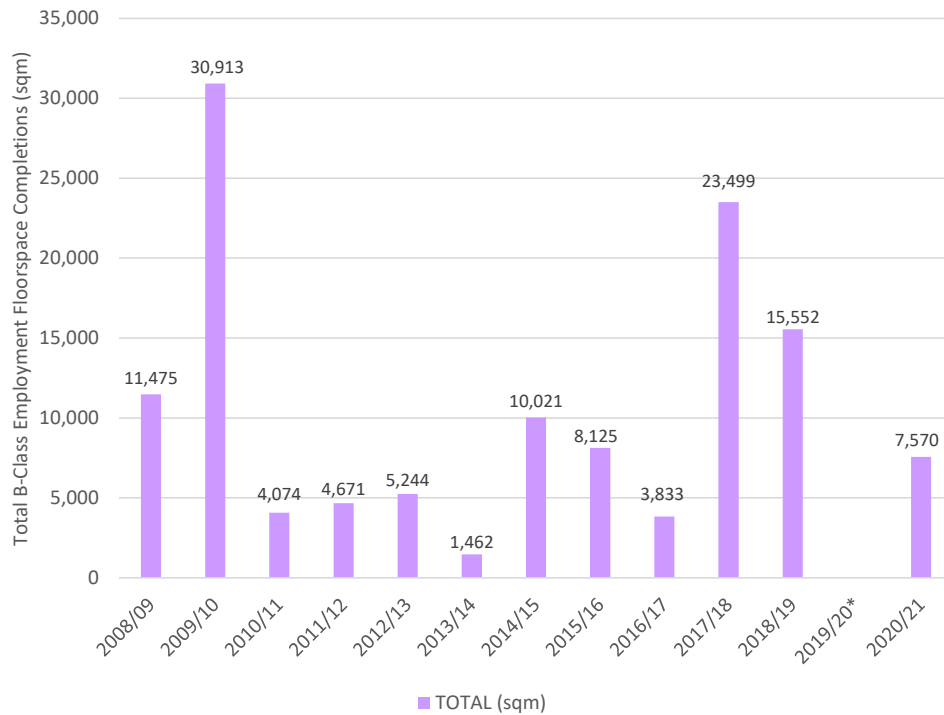
Source: CoStar (Accessed December 2021) / Lichfields analysis

## Development Rates

### Gross Completions

- 5.9 Data on gross completions for the period 2008/09 to 2020/21 was analysed, based on the Council's Annual Monitoring Reports [AMRs] for those years. Take-up (i.e. completions) of land for employment development has been provided by the Council over this time period, broken down by Use Class (see Figure 5.2). Data is incomplete for 2019/20, as the floorspace figures in the AMR for that year are identical to those reported for the previous year which suggests an error in the recording. Over this 12-year period (and excluding 2019/20), gross completions for B-Class uses in Ribble Valley amounted to 126,439 sqm, or 10,537 sqm per annum. This latter figure is equivalent to **2.63 ha per annum** if a standard plot ratio of 40% is applied.
- 5.10 Delivery has fluctuated, with a range of 1,462 sqm in 2013/14 to 30,913 sqm in 2009/10, with a particular cluster around the 4,000 sqm – 11,000 sqm mark which the average figure of 10,537 sqm sits within.
- 5.11 Redistributing the non-specific, mixed B-Class element on a proportionate basis across the employment use classes, the majority of this has come forward for office (37.4%), general industrial (25.2%) or B8 warehousing (20.2%) uses, with just 1.2% coming forward for R&D and the remaining 15.8% for light industrial uses.

Figure 5.2 Gross Annual Employment Land Completions 2008/09 – 2020/21



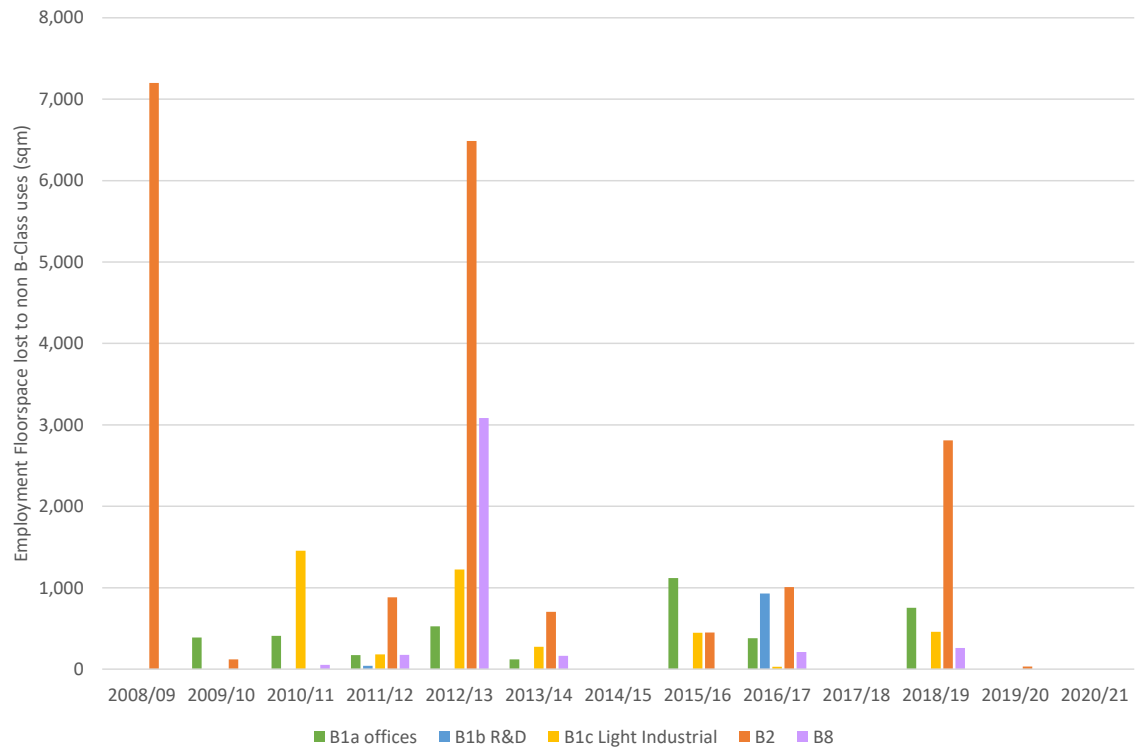
Source: RVBC Annual Monitoring Reports

## Losses

5.12

Losses have also been recorded by the Council in its previous AMRs dating from 2008/09 to 2020/21. Figure 5.3 indicates that a total of 32,570 sqm was lost to alternative non-B Class uses over those 13 years, at an average of 2,505 sqm, or 0.63 ha a year. As can be seen from the Figure below, almost 20,000 sqm of B2 general industrial floorspace has been lost, followed by 4,076 sqm of (former) B1c light industrial, 3,876 sqm of office floorspace and 3,951 sqm of B8 warehousing. Only 973 sqm of B1b R&D floorspace was lost to alternative uses over this time period. There have been two very clear peaks, in 2008/09 when 7,200 of general industrial floorspace was lost, and 2012/13 when 11,321 sqm of employment floorspace overall was removed from the portfolio.

Figure 5.3 Employment Land Losses in Ribble Valley, 2008/09 to 2020/21



Source: RVBC Annual Monitoring Reports

## Development Pipeline

5.13

The table below presents existing permissions of employment land, broken down by use class (office, industrial and storage) for the monitoring period, as well as details of land supply in previous years. **It indicates that Ribble Valley currently has a forward supply of 9.159 ha of employment land, of which 5.45 ha relates to office.**

Table 5.5 Ribble Valley Employment Land Supply, by Type

	2008/09	2009/10	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
B1											
- B1a Offices other than defined in Class A2	5.414	3.489	4.071	3.976	3.719	3.153	4.453	2.836	2.759	5.450	<b>5.45</b>
- B1b Research and development	0	0	0.036	0.024	0.024	0.078	0.078	0	0	0	<b>0</b>
- B1c Light Industry	3.100	2.353	1.942	2.444	2.611	2.875	1.309	1.083	0.813	0	<b>0.0827</b>
B2 General industry	2.211	1.969	1.416	1.824	1.419	1.997	2.131	2.045	1.366	0.079	<b>0.269</b>
B8 Storage or distribution centres including wholesale warehouses	0.332	0.632	0.243	0.269	0.375	0.418	0.036	0.603	1.197	0.128	<b>0.018</b>
Mixed	2.974	4.569	12.613	12.564	9.517	2.286	2.286	2.948	3.316	2.96	<b>3.34</b>
<b>TOTAL</b>	<b>14.031</b>	<b>13.012</b>	<b>20.321</b>	<b>21.101</b>	<b>17.665</b>	<b>10.807</b>	<b>10.293</b>	<b>9.515</b>	<b>9.451</b>	<b>8.617</b>	<b>9.159</b>

Source: RVBC (2021): Annual Monitoring Report 2020/21



## 6.0 Business Survey and Stakeholder Consultation

### Introduction

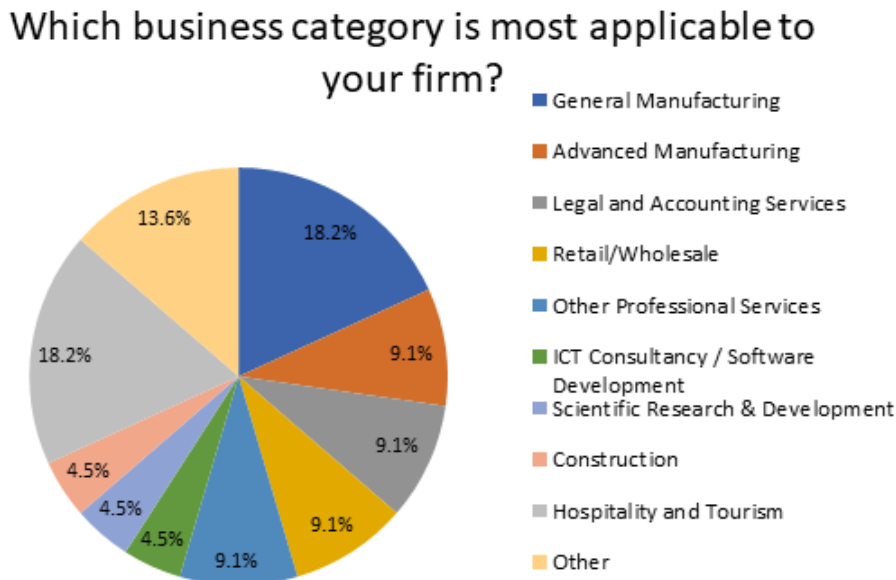
6.1 This section outlines the findings from the online Business Survey which was undertaken by Lichfields in September/October 2021 to gain a better understanding of local companies' current and future employment space needs. The survey was sent to contacts recorded by the Council in their business database. The Survey obtained responses from 23 businesses across a range of sectors and locations. It is accepted that due to the comparatively small response size it is difficult to draw definitive conclusions regarding Ribble Valley's business needs from this source alone. This section provides a summary of views gathered from the survey, backed up by conversations with local businesses, commercial agents and adjoining authorities.

### Business Survey Results

#### Profile of Businesses

6.2 Of the 23 respondents, 4 (18%) were general manufacturing firms with a similar number also in the hospitality and tourism sector. The advanced manufacturing, legal and accounting services, retail/wholesale and other professional services sectors were represented by two businesses (9% of all respondents) each. The ICT, scientific R&D and construction sectors are represented by one business (4.5% of all respondents) each. The respondents in the 'other' category include pest control, auctioneers and education businesses.

Figure 6.1 Business Survey Q3 Results

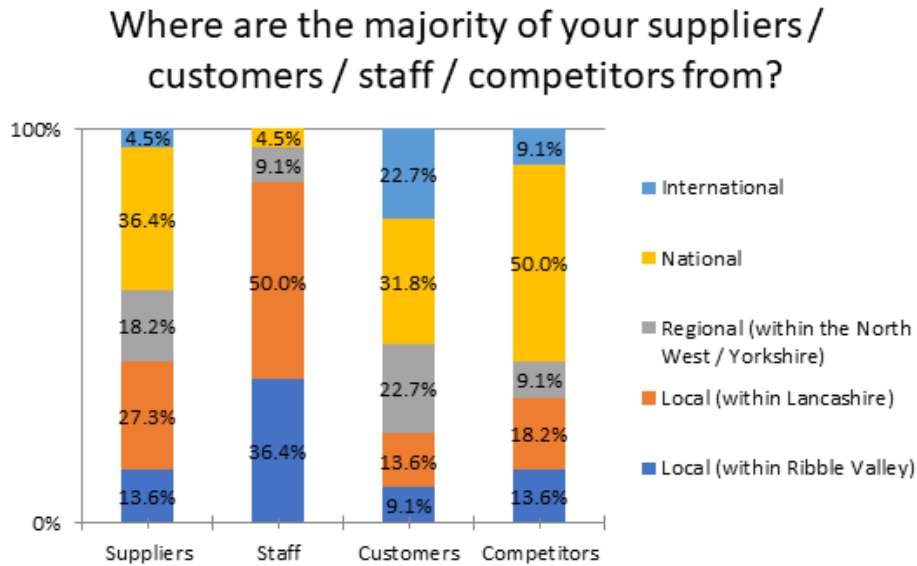


Source: Lichfields

6.3 Respondents included two key employers in Ribble Valley with over 300 and 400 employees, as well as a range of smaller business and sole traders. Figure 6.2 illustrates the geographical spread of respondents' suppliers, customers, staff and competitors. Just over 40% of suppliers fall within Ribble Valley and Lancashire, whilst 36.4% are located outside the North West and Yorkshire, indicating that links to the strategic road network are a key consideration. Links to the strategic road network are clearly a key factor in terms of supply chains. Staff, however, are

generally sourced locally, with 36% living in Ribble Valley and a further 50% from elsewhere in Lancashire. Customers had a relatively wide geographical spread with 32% being based outside the North West / Yorkshire and a further 23% outside of the UK. Respondents to the survey also tend to operate within a national or international market, with just under a third of competitors being based within Lancashire.

Figure 6.2 Business Survey Q5 Results

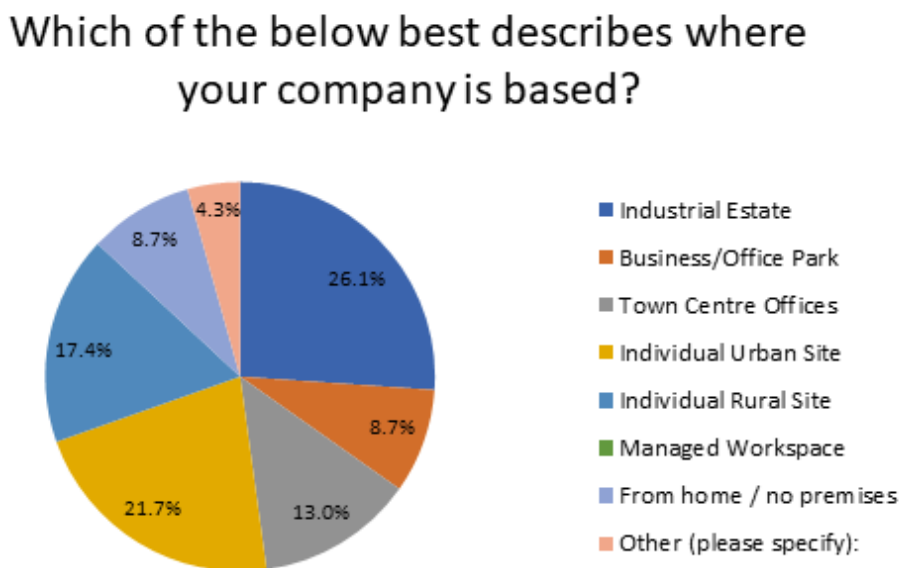


Source: Lichfields

### Current Premises

6.4 In terms of business location, 26% of respondents are located on an industrial estate compared to 9% within business/office parks. 13% are located within town centre offices with a further 22% located in individual urban locations (such as high street retail units). 17% operate from an individual rural location, whilst 9% have no permanent premises and work solely from home.

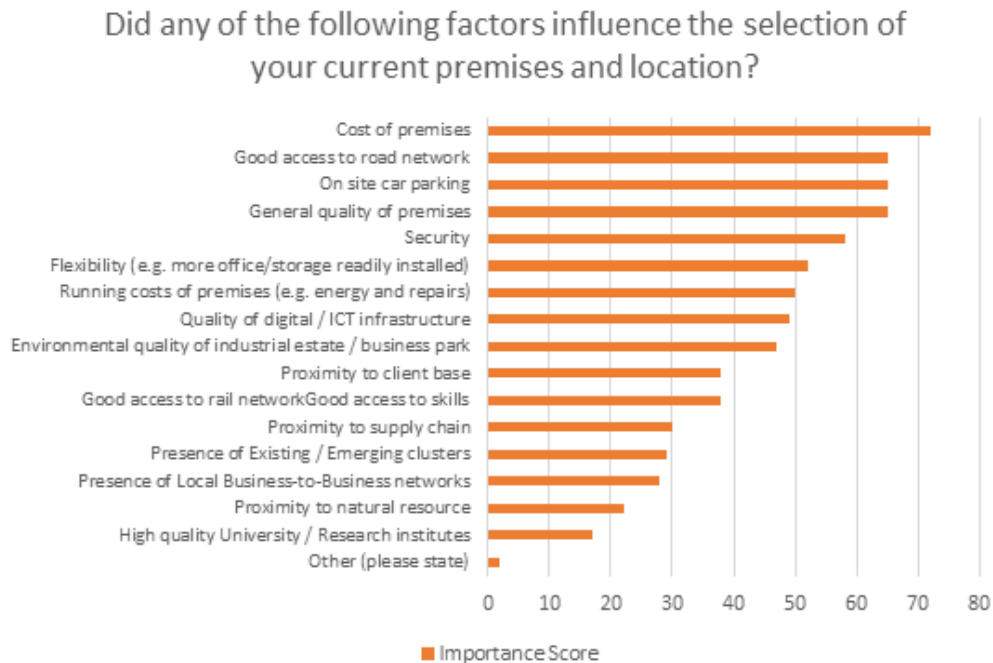
Figure 6.3 Business Survey Q6 Results



Source: Lichfields

- 6.5 64% of respondents have been based in their current premises for more than 10 years, with a further 23% staying in their current premises for more than 3 years, but less than 10 years. The Survey gathered relatively high representation from newly located firms, with 9% having been in their current premises for less than 6 months. Half of respondents have always been located in their current premises. Of those that have relocated, three had relocated from elsewhere in Ribble Valley whilst the rest had relocated from elsewhere in Lancashire (typically Blackburn, Preston or Nelson).
- 6.6 As shown in Figure 6.4, respondents were asked to rank the importance of a series of factors that influenced the selection of their premises and location. These ranks have been combined to produce an overall importance score for each factor. Cost of premises received the highest overall score of 72, followed by road network access, on site car parking and the general quality of premises all of which scored 65. Site security, flexibility of use and running costs were also deemed relatively important.

Figure 6.4 Business Survey Q10 Results



Source: Lichfields

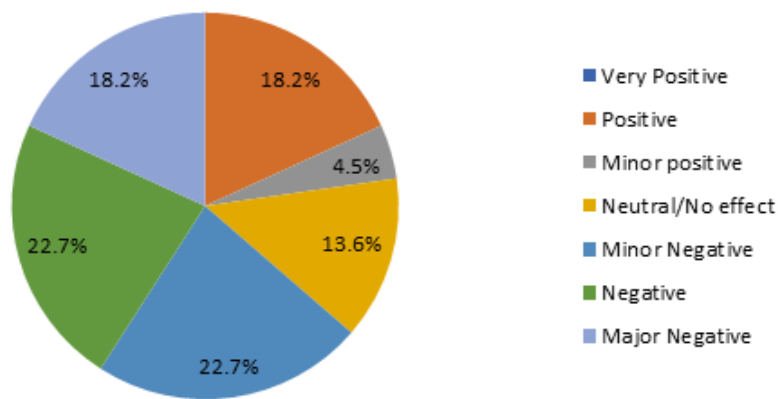
- 6.7 The respondents were asked how well their current premises/site suited their needs and if they have experienced any difficulties in finding suitable premises within Ribble Valley. Respondents were positive overall about the suitability of their current premises, with 68% rating their premises as ‘good or excellent’. A number of respondents expressed that they are looking to expand their office based/industrial businesses but are struggling due to a lack of appropriate larger sites or are grappling with the challenges of gaining planning permission in order to expand their current premises. Some respondents indicated that the lack of suitable premises in Ribble Valley may force them to relocate outside of Ribble Valley, whilst town centre-based respondents stressed the need to increase footfall and suggested increased pedestrianisation as a way of achieving this. Similarly, 53% of those who has searched for new premises expressed difficulty in doing so, stating a lack of smaller modern office sites with access to fast internet and local services; a lack of medium sized industrial units for SMEs looking to upscale; and, a lack of warehousing space over 30k sq ft in size. One respondent stated it had taken them ten years to find appropriate premises in Ribble Valley.

### Recent Performance and Future Plans

6.8 As shown in Figure 6.5, 63% of all respondents have seen their business be negatively affected by the pandemic and associated lockdowns, with almost a fifth (18%) stating that it had had a major negative effect. Interestingly, 18% also stated that their business had been positively affected, although none chose ‘very positive’.

Figure 6.5 Business Survey Q13 Results

Overall, how would you describe the effect of Covid-19 on your business so far?

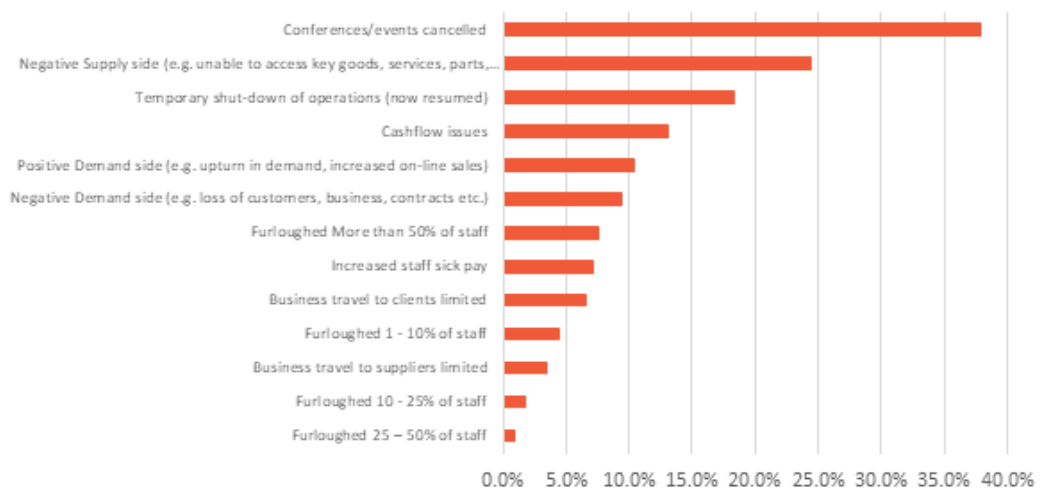


Source: Lichfields

6.9 When asked to indicate the specific effects of the Covid-19 crisis, the top factors included conferences/events being cancelled with 38% of the votes, followed by negative supply side effects (25%), temporary shutdown of operations (18%) and Cashflow issues (13%). Some businesses also reported positive demand side effects as a result of the crisis with 10% of the votes.

Figure 6.6 Business Survey Q14 Results

Please indicate the effects of the Covid-19 crisis on your business (Tick all that apply)



Source: Lichfields

- 6.10 In terms of how businesses responded to the crisis, almost half of respondents (47%) now allowed for greater flexibility in working patterns and 24% noted increased levels of working from home or remote working amongst their staff. 29% of respondents took the opportunity to increase capital investment into their business. Interestingly, a third of respondents (33%) stated they had increased the number of employees in reaction to the crisis, compared to 6% who said that they decreased the number of employees.
- 6.11 55% of respondents said that they are planning to make changes to their premises over the next five years, with 75% of those indicating that they require more space. Other changing requirements included the need to downsize in order to reduce costs as well as needing to potentially relocate for improved road and rail network access. 54% of those looking to make changes are planning to adapt their existing premises, 31% are looking to relocate within Ribble Valley and 15% outside of Ribble Valley.

### **Ribble Valley as a Business Location**

- 6.12 The survey ended with a series of open-ended questions allowing respondents to highlight the strengths and weaknesses of their location and Ribble Valley more widely, as well as what the priorities for the Council should be moving forward. A number of strengths were mentioned by multiple respondents, including the idyllic rural nature of the area and the relative success of local centres like Clitheroe. Other positives tended to be business or location specific, including proximity to the workforce and the accessibility offered by the A59.
- 6.13 In terms of weaknesses, a number of respondents highlighted that rail infrastructure could be improved, with more regular and quicker services running from Clitheroe to Manchester / Blackburn in particular and improved connectivity with Blackburn, Preston and Skipton more generally. A number of suggestions were made in terms of improving Ribble Valley's centres with a focus on Clitheroe. Poor traffic flow was highlighted as well as a lack of parking, particularly for coaches which is said to limit tourism. Increased pedestrianisation was also mentioned as a way to improve the attractiveness of, and footfall within, Clitheroe Town Centre.
- 6.14 Numerous business highlighted the need for continued investment and innovations to maintain and boost tourism and footfall within Ribble Valley's local centres. A number of respondents indicated that they have faced difficulty in achieving planning permission for expansion or alterations to their existing premises. Other specific weaknesses mentioned were road connectivity/distance to motorways, poor internet connectivity/power supply and relatively high commercial rents compared to other nearby areas.
- 6.15 When asked to suggest priorities for the Council, the responses focussed on a few conflicting themes, with many asking for a bigger range of office and industrial floorspace and more housing in order to expand the local workforce, but a number also asking for less housing (and even less building overall) due to the pressure on local services and infrastructure. Other feedback called for improved cycling and pedestrian infrastructure as well as a need to boost Clitheroe with a wider range of retail and experiences on offer.
- 6.16 Clearly, there is a careful balancing act to be performed by the Council, with priorities often being contradictory depending on the needs of particular businesses and their location across Ribble Valley.
- 6.17 Fort Vale Engineering is located at Simonstone adjacent to Time Technology Park. The company has been based in Ribble Valley since 2008 and employs around 420 people. The firm's location near to the M65 is vital as they are a manufacturer who ship products all over the world. The company owns around 31 ha of land of which they currently occupy around 6 ha, however most of this land is within the Green Belt. The firm currently occupies a number of

units on the site and has applied for planning permission for an additional B2 unit. However, we understand that this application is pre-emptive and the unit will only be built if the business requires room to expand in the future.

- 6.18 Lichfields spoke in more detail to two key employers. James Alpe Ltd is a local business employing around 100 people. The firm has acted as developer for 48 new industrial units at Twin Brooks business park, as well as having a specialist accident repair and vehicle conversion arm of the business. Their experience in being a home-grown Ribble Valley business and contributing to the development of new employment floorspace gives them a unique perspective. The 48 units at Twin Brooks were fully occupied before completion with a waiting list in place, indicating a high level of demand for these units which the company is eager to cater to with further developments. Meanwhile, the company has had a strong recovery from the Covid 19 pandemic and is looking to expand within Ribble Valley but is struggling to find appropriate floorspace.
- 6.19 They consider that there are many firms similar to them that are trying their best to expand within the Borough rather than move but are facing such difficulties, as well as there being a steady stream of firms looking to relocate to Ribble Valley from elsewhere.

## **Responses of Adjoining LPAs**

### **Blackburn with Darwen Borough Council**

- Blackburn's Local Plan is currently under review, with the Regulation 19 consultation set to begin in early 2022. The review takes account of factors like Brexit and Covid-19 but has not had a major impact on needs.
- The latest forecasts and baseline are below the Council's expectations and the Council is pursuing an economic growth scenario primarily targeting manufacturing, health and education.
- Employment land needs in the Local Plan draft total 46.4 ha to 2037
- The Council is satisfied that the Borough can meet its own needs however this requires Green Belt release.
- Ribble Valley is a minor source of labour for the Borough with no other notable cross boundary issues.
- As part of the Local Plan Review the Council is allocating a strategic 38 ha employment site at Junction 5 of the M65, of which 22 ha will be released from the Green Belt.

### **Burnley Borough Council**

- No response received.

### **Hyndburn Borough Council**

- The Council is currently progressing towards publication of a Regulation 19 draft of its new Local Plan.
- An update to the previous 2018 ELR has been commissioned. Employment land needs have not altered significantly and remain at around 59 ha to 2036.
- The Council is satisfied the Borough can currently meet its own needs.

- The Council's key employment sites include:
  - (a) The 100m sq ft of employment space at Frontier Park is approaching completion. There are a number of other employment allocations near to this site although most fall within the Green Belt.
  - (b) The Council may support the expansion of the strategic employment hubs at Altham Business Park and Junction 7 Business Park as strategic employment allocations – to be confirmed at Regulation 19 consultation stage.

### **Lancaster City Council**

- The Council adopted a new Local Plan in July 2020 which includes a Strategic Policies & Land Allocations DPD and a reviewed Development Management DPD.
- The Local Plan is currently under review to incorporate a consideration of the climate emergency, with the Council having recently completed the Regulation 18 consultation. This has had no effect on employment land needs or allocations.
- Lancaster's Local Plan Part 1 identifies an employment land need of 59.5 ha across the District to 2031.
- The Council is satisfied that the City can meet its own needs despite being relatively constrained due to environmental factors.
- The Council's key employment sites include:
  - (a) Heysham Gateway – The Council supports E(g)/B8 development that deliver effective regeneration and improvement across a number of allocated sites in the Heysham port area.
  - (b) South Lancaster – the Council has produced an action plan for South Lancaster which includes the Bailrigg Garden Village which will include around 3,500 homes and employment development.

### **Pendle Borough Council**

- Pendle's Local Plan Part 1: Core Strategy identifies an employment land need of 9.02 ha up to 2030.
- The Council is satisfied that the Borough can currently meet its own needs.
- The Council has a good relationship with RVBC. Cross-border issues are primarily linked to management of the Forest of Bowland AONB and related tourism.
- The Council's key employment sites include:
  - (a) A strategic employment site at Lomeshaye (c.30ha, 16.0 hectares net) is allocated in Policy WRK3 to help meet demand, which is focussed on the M65 corridor.
  - (b) Pendle Local Plan Part 2 Policy WRK7 allocates a 7 ha extension to West Craven Business Park, Ealing
  - (c) Pendle Local Plan Part 2 Policy WRK9 allocates a site at Ouzledale Foundry, Barnoldswick for a mixed use development of 87 dwellings and 5ha of B2/B8 employment land.

### **Preston City Council**

- No response received.

### **South Ribble Borough Council**

- The current draft Central Lancashire Employment Land Study Update identifies a need of 77.66 ha up to 2038 in South Ribble.
- The Council is satisfied that the Borough can currently meet its own needs.
- The Council holds regular meetings with RVBC in relation to the Lancashire Enterprise Zone at Samlesbury and the two have a good working relationship.
- Key future employment developments/sites include:
  - (a) Permitted development application 07/2020/00600 for a warehouse building within the Samlesbury Enterprise Zone. This appears to be complete and operational.
  - (b) Farrington Hall Estate in Leyland - Outline planning permission was granted in May 2021 for a large-scale employment development on land to the west of Lancashire Business Park, off Centurion Way in Leyland. As part of the scheme, permission was granted for up to 56,904 sqm of light industrial (E(g) Use), general industrial (B2 Use), storage and distribution (B8 Use) and ancillary office (E(g) Use). A reserved matters application for this site, for 51,793.4 sqm, is currently under consideration.
  - (c) Cuerden Strategic Site (65 ha) – Lancashire County Council are exploring options for this site.



## 7.0 Review of Employment Sites

7.1 This section presents the findings of an assessment of employment land supply in Ribble Valley and considers the characteristics and quality of existing and allocated employment sites in Ribble Valley and their suitability to meet future employment development needs.

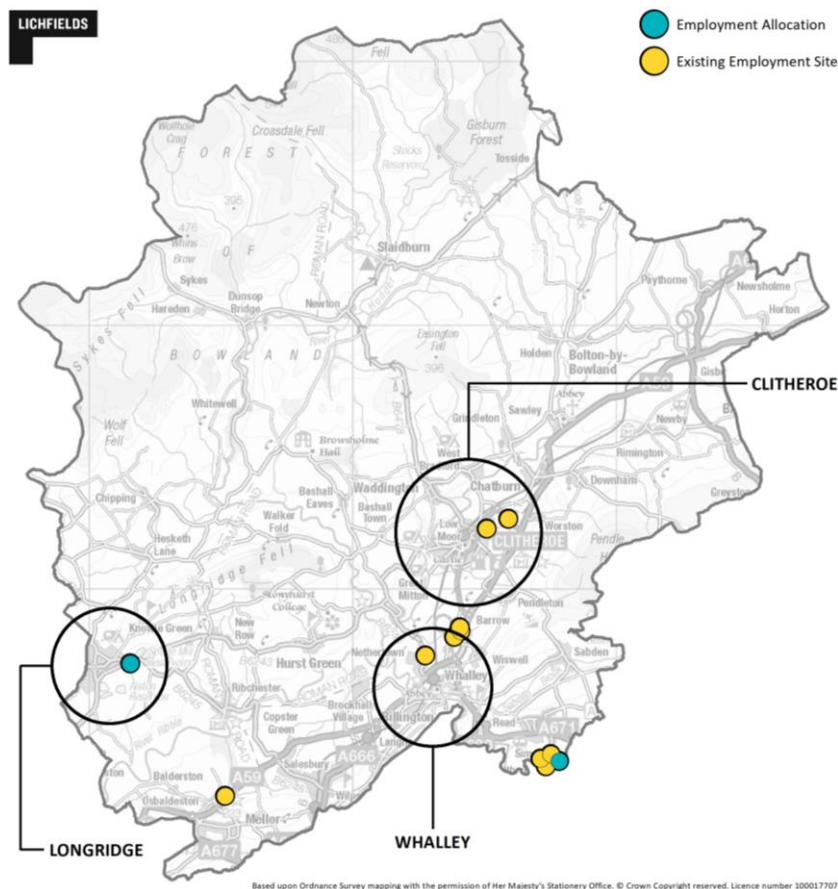
7.2 In consultation with the Council it was agreed that the assessment should focus on sites that are either currently in existing employment or other use, or allocated for office/industrial/warehousing within the adopted HED DPD (October 2019).

7.3 The committed stock of employment space in the study area therefore comes from two key sources:

- 1 **HED DPD allocations:** designated new employment sites under policies in the DPD (that had not yet been built out at the time of the review supporting the 2019 DPD); and,
- 2 **Extant planning permissions:** other sites with extant planning permission (i.e. permissions that have not yet expired and could be implemented) for employment development (as at the time of the review supporting the 2019 DPD).

7.4 We have also appraised vacant land within existing employment sites surveyed; specifically, designated Primary Employment Areas (under Policy DMB1 of the adopted Core Strategy) incorporating under-utilised land. The committed supply of employment space has been identified by Council Officers as falling within the above categories.

Figure 7.1 Location of Employment sites reviewed by Lichfields in 2021



Source: Lichfields

7.5 **In total, 12 existing or allocated sites were assessed, amounting to 18.31 ha of land (this is gross – the net developable area is much lower, at 9.49 ha as set out below).**

7.6 The location of the assessed sites is presented in Figure 7.1.

## Approach

7.7 It is vital that the Council identifies a future supply of land which is suitable, available and deliverable for economic development uses over the plan period. Identifying such a supply will help enable Ribble Valley to respond to business requirements and meet its objectively assessed economic development needs.

7.8 The 12 potential sites were inspected for their suitability for employment use in line with the former Practice Guidance and the site survey information identified within paragraph 015 of the Housing and Economic Land Availability Assessment [HELAA] guidance<sup>26</sup>. This focused on the following criteria:

- 1 Site description including size, boundaries and location and current land use;
- 2 Physical limitations or problems such as strategic road/local access, infrastructure, ground conditions, flood risks, pollution or contamination (where known);
- 3 Potential impacts including the effect upon nature and heritage conservation;
- 4 Consistency with the development plan policies;
- 5 Appropriateness and likely market attractiveness (including vacancy and market activity on site) for the type of development proposed;
- 6 Proximity to labour and services;
- 7 Barriers to, and timescales for, delivery;
- 8 Environmental/amenity impacts experienced by would be occupiers and neighbouring areas; and,
- 9 Initial assessment of whether the site is suitable for a particular type of use or as part of a mixed-use development.

7.9 In addition to the above criteria, the assessment also considered other site-specific factors such as their policy status, planning constraints and suitability for specific uses. Although flood risk was considered as a part of this assessment, it is recognised that being in a flood zone does not necessarily preclude some types of commercial uses from coming forward for development.

7.10 The assessment of gross site areas to net developable areas was based upon standard plot adjustment assumptions as set out in Appendix 2, except where site specific factors required adjustments, for example if steep topography further limited the net developable area. Sites that are fully developed are given a net developable area of 0 (zero) ha. Fully developed sites recommended as being suitable for employment use therefore do not contribute to Ribble Valley's future employment land supply in a quantitative sense at least.

7.11 The site visits were supplemented by discussions with key stakeholders including commercial agents and key local employers / developers. The assessments also reviewed data such as relevant planning policy, flood risk, listed buildings status, conservation areas and relevant planning history.

7.12 Individual proformas for the assessed sites are included in Appendix 1, which provides photographs, red-line boundaries on aerial maps, descriptions, assessments, the final rating and

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<sup>26</sup> ID: 3-015-20190722

recommendation for each of the assessed sites. Details of the criteria used to rate these sites are contained in Appendix 3.

- 7.13 The criteria rating categories of ‘very good’, ‘good’, ‘average’ and ‘poor’ are intended to provide a broad indication of the overall quality of employment land supply rather than a comparison of one site against another.
- 7.14 It should be noted that the assessment process in itself does not necessarily provide a complete picture of the local significance of certain sites. For example, a site could be assessed to have the potential to satisfy particular business and sector needs (i.e. which can be important reasons for retaining the site) even if it does not perform well against conventional site assessment criteria. A wider commentary is therefore provided to supplement the formal scoring exercise.
- 7.15 Accordingly, the assessment is also informed by factors such as market intelligence, market attractiveness, sustainability considerations and compliance with planning policy set out in the NPPF. Greater weight has been given to sites which best respond to the market’s needs and where any identified constraints can be overcome, with appropriate mitigation, through the planning process. A site, for example, could be considered as having the potential of satisfying particular business or sector needs (which can be important reasons for retaining it, even if it does not perform well against conventional site assessment criteria).
- 7.16 Similarly, sites with significant known impediments / constraints (such as contamination, or subject to significant flood risk) have been downgraded. If any site constraints were to be removed in the future (i.e. policy constraints, access improvements, site contamination/ remediation), the scoring of a site would be likely to improve.
- 7.17 It is also important to note that the assessments are based on the conditions and data observed during the timescales of the study. Such information is time-sensitive and may change in the future. The intrinsic qualities of sites and the associated scores have been derived on the basis of this assessment. It is possible that the relative rankings of sites could change in the future if measures were put into place to enhance their functioning as employment sites (for example through new infrastructure and servicing).
- 7.18 The assessment provided in the following sections is presented on a ‘without prejudice’ basis as evidence to inform the preparation of Ribble Valley’s Local Plan review. It does not constitute Council policy and future employment allocations should be determined through the formal consultation process as part of the Local Plan review.

## Overview of Committed and Existing Employment Sites

- 7.19 As summarised in Table 7.1, overall, around 14.4 ha (gross), 7.34 ha net of existing / committed employment land was assessed for this study. The bulk of this relates to 3 large sites in Barrow, in and around Barrow Brook Business Park, which comprises almost 50% of the gross site area and a very significant 70% of Ribble Valley’s entire net developable employment land area. In contrast, there is little or no land currently developable of reemployment uses at the 12 surveyed sites in Ribble Valley’s principal administrative town of Clitheroe, or Whalley.

Table 7.1 Distribution of assessed employment sites in Ribble Valley

Location	Number of sites	Total gross site area (ha)	% of total gross site area	Total net site area (ha)	% of total net site area
Clitheroe	2	0.84	5.8%	0	0.0%
Barrow	3	7.14	49.7%	5.14	70.0%
Longridge	1	<b>1.55</b>	10.8%	<b>1.55</b>	21.1%
Whalley	1	<b>1.85</b>	12.9%	<b>0</b>	0.0%

Location	Number of sites	Total gross site area (ha)	% of total gross site area	Total net site area (ha)	% of total net site area
Simonstone	4	3.06	21.3%	0.65	8.9%
Mellor	1	<b>0.76</b>	5.3%	<b>0</b>	0.0%
<b>RIBBLE VALLEY TOTAL</b>	<b>10</b>	<b>14.36</b>	<b>100.0%</b>	<b>7.34</b>	<b>51.1%</b>

Source: Lichfields Analysis

## Existing and Allocated Employment Sites

7.20 The final recommendation for each site is informed by the site assessment and commentary as presented in Appendix 1. The recommendations are based on a rounded qualitative judgement reflecting a detailed consideration of the following key issues:

- Sustainability** –whether a site demonstrates characteristics that make it sustainable, such as being previously developed land; accessible by public transport; compatible with neighbouring uses; and in an area at a lower risk of flooding;
- Market Attractiveness** - whether a site is: likely to be commercially attractive from a developer’s perspective (taking into account the possible need for site remediation, levelling and off-site and on-site infrastructure work); in an area of strong demand; and likely to be viewed as attractive by agents/occupiers; and,
- Policy Adherence** - whether there are any known policy constraints affecting the site or immediate surrounding area. These may relate to the natural, built and/or historic environment, such as whether the site lies within the Green Belt.

7.21 Overall, the assessments of existing sites indicate that Ribble Valley does not have a good range of employment sites of varying quality and type, with most of the forward supply concentrated at one site in Barrow, the Barrow Brook Business Park. There is a clear shortage of large modern sites that have good access to transport links. Furthermore, much of the existing stock comprises older buildings, some of which are mill buildings. In general, these premises do not currently meet the needs of modern businesses, and consequently tend to have higher vacancy rates.

7.22 Table 7.2 summarises the 12 existing/allocated assessed sites in Ribble Valley.

Table 7.2 Summary of assessed allocated and existing sites in Ribble Valley

Address	Town	Size (ha) (net)*	Site Rating (no. sites)	Status and Recommendation
Hindle and Schofield Site, Barrow Brook Business Park	BARROW	0.08	<b>Very Good (3)</b>	<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1
B Dugale and Son, Bellman Mill, Salthill	CLITHEROE	0.00		<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1
Land at Time Technology Park	SIMONSTONE	0.15		<b>Retain</b> as a designated site for employment development in accordance with Policies DMB1 and EAL2
Land off Hey Road, Barrow Brook Business Village	BARROW	5.06	<b>Good (8)</b>	<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1
Land North of Barrow Brook Business Village	BARROW	2.64**		<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1
Casting Foundry Site, Fort Vale Engineering, Calder Vale Park, Simonstone Lane	SIMONSTONE	0.00		<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1

Address	Town	Size (ha) (net)*	Site Rating (no. sites)	Status and Recommendation
Rear of Building 'S', Fort Vale Engineering, Calder Vale Park, Simonstone Lane	SIMONSTONE	0.00		<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1
Land at Salthill Industrial Estate, Lincoln Way, Clitheroe	CLITHEROE	0.00		<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1
Higher College Farm, Lower Road, Hothersall, Longridge	LONGRIDGE	1.55		<b>Retain</b> as an employment land allocation under Policy EAL3
Mitton Road, Land Adj former Genus Site, Whalley	WHALLEY	0.00		<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1. <b>There is potential to further extend the site boundary to include phase 3 development and up to the rail line to the east.</b>
Fairfield Farm Business Park	MELLOR	0.00		<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1.
Land Adj. to Simonstone Lane, Time Technology Park, Simonstone	SIMONSTONE	0.50	<b>Average (1)</b>	<b>Retain</b> as a designated site for employment development in accordance with Policy DMB1. <b>The site boundary should be redrawn to fit the available space</b>
<b>RIBBLE VALLEY TOTAL</b>		<b>7.34</b>	<b>12</b>	

\*Where net size = 0ha, the plot is fully developed

\*\*Note: this site is located within the wider 'Land off Hey Road, Barrow Brook Business Village, therefore the 2.64 ha is not added to the overall Ribble Valley-wide total of available employment land

Source: Lichfields analysis

7.23 As can be seen in Table 7.2, all of the existing and allocated sites were recommended to be retained for employment use. This is partly due to the comparatively low level of available employment land in Ribble Valley, but also because even where the site is rated less highly when set against the appraisal criteria for the reasons set out above, the sites nevertheless perform an important local function in the context of relatively high demand for industrial premises in Ribble Valley.

7.24 A summary of each site, and the justification behind the policy recommendations, is set out below (with further details provided in the pro-formas in Appendix 1):

- **Hindle and Schofield Site, Barrow Brook Business Park, Barrow (0.08 ha), rated as VERY GOOD:** The site is located within the existing Barrow Brook Business Park development, adjacent to the A59. The business park includes a number of retail/food and manufacturing units. The site comprises part of Barrow Enterprise Site (Policy DS1) and is a Committed Employment Site (Policy DMB1). The site has been gradually developed for a number of small units currently housing a number of Sui Generis and trade counter uses. There is a small area of undeveloped land which currently has approval for both office and industrial/trade counter uses (3/2019/0304 and 3/2021/0397). The site sits within an established employment area amongst compatible uses and is meeting local needs. Therefore, **the site should be retained and protected for employment use in accordance with Policy DMB1.**
- **B Dugale and Son, Bellman Mill, Salthill, Clitheroe (0.00 ha), rated as VERY GOOD:** The site falls within the wider Salthill Industrial Estate, which contains a range of E(g), B2 and B8 uses. The site is located to the eastern boundary of the industrial estate adjacent to the A671. It falls within the provisions of Core Strategy Policy DMB1 as an existing employment site. The site is wholly occupied by food manufacturer Dugdale Nutrition and includes a storage/distribution warehouse and associated office. There is also an associated production facility and further storage unit outside of the site boundary. There

is no further room for development on the site. The occupier has already expanded the site beyond the current site boundary leaving no room for further expansion due to geographical factors. The occupier is well established, the site sits within an established employment area amongst compatible uses and is meeting local needs. Our recommendation is that **the site should be retained and protected for employment use in accordance with Policy DMB1. Furthermore, the site boundary should be redrawn to encompass the entire Dugdale Nutrition site.**

- **Land at Time Technology Park, Simonstone (0.15 ha), rated as VERY GOOD:** This site lies adjacent to the eastern boundary of the existing Time Technology Park and immediately adjacent to the DWP Pensions Centre car park. The site provides 18 modern B1/B8 units smaller than those offered at other sites nearby. The site falls within the provisions of Policy DMB1 of the adopted Core Strategy and is allocated as employment land under Policy EAL2 of the HED DPD. The site currently contains 18 small industrial/office units offering c.3,550 sqm with associated access and parking. The site also currently contains an overflow car park for the DWP Pensions Centre, although planning has been granted for an additional 4 business units totalling 700 sqm to replace this car park. The site sits within an established employment area amongst compatible uses, is close to being fully occupied and is meeting local needs. Our recommendation is that the site should be **retained and protected for employment use in accordance with Policy DMB1 and (for the remaining developable land) Policy EAL2.**
- **Land at Hey Road, Barrow (5.06 ha), rated as GOOD:** The site forms part of the Barrow Enterprise Site (Policy DS1 in the adopted Ribble Valley Core Strategy) and is a Committed Employment Site (Policy DMB1). The site is further identified as principle location for employment development under Key Statement EC1 in the adopted Core Strategy. The greenfield site is in use for grazing. It is understood that there is a ransom strip between the existing business park to the south and the site which may lead to new access infrastructure being required via the A59. Agents confirmed that the site has not come forward principally due to the issue of access, with no agreement able to be reached to date between the respective owners. An access slip road is included in the layout under application 3/2021/0759, although agents raised a potential concern regarding the ability to achieve suitable access for HGVs that does not cause issues on the A59, plus the need for HGVs to turn around when heading southwards or coming in from the north. The site is, however, the largest available site included in this assessment and is suitable for a range of E(g)/B2/B8 uses. **Our conclusion is that the site should be retained as a designated site for employment development in accordance with Policy DMB1.**
- **Land North of Barrow Brook Business Village, Barrow (2.64 ha), rated as GOOD:** The site is located behind the existing Barrow Brook Business Park development, adjacent to the A59. The existing business park includes a number of retail/food and manufacturing units. The site is currently used as farmland and forms the southernmost portion of the 'Land at Hey Road' site discussed above. As such, the points raised above are all relevant to this smaller portion of the site, which is subject to an outline application to provide up to 9,913 sq m of new commercial/employment floorspace (Use Class E), with the applicants requesting consideration of access only with all other matters reserved. As above, and notwithstanding the access issues which will need to be overcome, it is our recommendation that the site is suitable for a range of E(g)/B2/B8 uses, and that it **should be retained as a designated site for employment development in accordance with Policy DMB1.**

- **Casting Foundry Site, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone (0.00 ha), rated as GOOD:** The site falls entirely within the existing Calder Vale Park employment area, which is occupied entirely by Fort Vale Engineering. The adopted Core Strategy identifies the site as falling within the provisions of Policy DMB1 as an existing employment site. The site (as defined by the current Plan boundary) is fully built out and sits adjacent to Time Technology Park which contains a range of B2 uses and is less than 1km from other business parks at Altham and Shuttleworth. The site is fully occupied by an important local employer and is clearly fulfilling local needs. **Therefore, the site should be retained and protected for employment use in accordance with Policy DMB1. However, our view is that there is an opportunity to expand and merge this boundary with Fort Vale Engineering’s ‘Rear of Building S’ site to encompass the whole Calder Vale Site as recommended below.**
- **Rear of Building ‘S’, Fort Vale Engineering, Calder Vale Park, Simonstone Lane, Simonstone (0.00 ha), rated as GOOD:** The site falls entirely within the existing Calder Vale Park employment area, which is occupied entirely by Fort Vale Engineering. The irregular shape of the site in the context of the existing development likely relates to a planning application that did not come to fruition and should be amended. The adopted Core Strategy identifies the site as falling within the provisions of Policy DMB1 as an existing employment site. The site is fully built-out. Site is wholly owned by Port Vale Engineering within a wider site and is retained for their use. The site is fully occupied by an important local employer and is clearly fulfilling local needs. **Therefore, the site should be retained and protected for employment use in accordance with Policy DMB1. However, our view is that there is an opportunity to expand and merge this boundary with Fort Vale Engineering’s ‘Casting Foundry Site’ to encompass the whole Calder Vale Site as recommended above.**
- **Land at Salthill Industrial Estate, Lincoln Way, Clitheroe (0.00 ha), rated as GOOD:** The site falls within the provisions of Core Strategy Policy DMB1 as an existing employment site along with the wider Salthill Industrial Estate. The site is fully built out and accommodates a haulage company and storage/service yard. Part of the site comprises a vacant unit of 420 sqm currently being marketed for trade counter/office/showroom uses. Agents confirmed that whilst there are 2/3 enquiries about the vacant unit a week, the unit has been on the market for around 6 months and has a quite specific layout inside that somewhat limits its flexibility. However, the unit remains a modern and attractive unit in a desirable location and enquiries continue to be strong. The site sits within an established employment area amongst compatible uses and is meeting local needs. Therefore, our recommendation is that the site should be **retained and protected for employment use in accordance with Policy DMB1.**
- **Higher College Farm, Lower Road, Hothersall, Longridge (1.55 ha), rated as GOOD:** This is an isolated former farming site to the south east of the Longridge urban area. It lies adjacent to the B6243 along the northern boundary. The site relates to a field north of the grounds of an existing farm building associated with a wholesale/catering butchers’ firm that occupies a small industrial unit just outside the south western corner of the site boundary. The site is identified in the HED DPD as an employment land allocation under Policy EAL3. Until recently, the site had extant outline planning permission for conversion of the farmhouse to B1 and the construction of up to 3,000 sqm of B2/B8 floorspace comprising a number of small units. The permission included the construction of new access from the B6243. The site is currently listed as being under offer on a commercial agent’s website. Given that the site is one of just three employment land

allocations within the HED DPD, it is **our recommendation that the site be retained for potential employment development.**

- **Mitton Road, Land Adj former Genus Site, Whalley (0.00 ha), rated as GOOD:** The site is known as Mitton Road Business Park and contains a number of small industrial and office units which has extended beyond the site boundary immediately to the South, with further room for expansion beyond. The adopted Core Strategy identifies the site as falling within the provisions of Policy DMB1 as an existing employment site. All of the completed units are occupied, with a handful of units towards the rear of site nearing completion. Groundworks for the remaining buildings of phase 2/3 have begun with construction equipment present on site. The layout incorporates an internal estate road which has the potential to unlock land to the south which lies outside the current site boundary. However, there is currently no application in place for further units beyond phase 3 which would in any event be beyond the boundary identified for this assessment. The main issue relates to access to the local and strategic road network which requires driving through the residential area of Whalley and under a low railway bridge. Despite this, agents confirmed that demand for new units at this location is strong with a waiting list in place. Therefore, the site should be protected for employment use and further development, with the site boundary extended to incorporate phase 2 and 3 as well as possible further development on the land to the east. Our recommendation is to **retain and protect the site for employment use. There is potential to further extend the site boundary to include phase 3 development and up to the railway line to the south and east.**
- **Fairfield Farm Business Park, Mellor (0.00 ha), rated as GOOD:** The site comprises a rural and relatively isolated business park located on the A59 east of Osbaldeston. The site is designated as an existing employment area (Policy DMB1) in the adopted Core Strategy. This is a small business park occupied by a number of small and irregular retail, manufacturing and office units. Businesses include a garden furniture manufacturer, bicycle shop, pet shop and café with some more manufacturing use towards the rear of the site. The site sits on former farmland with the farmhouse remaining in residential use just beyond the south west corner of the site boundary. There are no vacant units on the site. A new unit/extension is currently under construction in the centre of the site. No further room for development remains within the site boundary. The site has a relatively unique offer in the Ribble Valley context for small traders, is fully occupied and is clearly meeting local needs. **Therefore, our recommendation is that the site should be retained and protected for employment use under Policy DMB1.**
- **Land Adj. to Simonstone Lane, Time Technology Park, Simonstone (0.50 ha), rated as AVERAGE:** The site is brownfield land that currently comprises an under-utilised open storage area towards the rear of the existing Time Technology business park. This is a security gated business park which currently accommodates a number of B2 and B8 uses. The site is to the rear of two existing industrial units with access from the business park and has a boundary with a disused rail line to the north. The adopted Core Strategy identifies the site as falling within the provisions of Policy DMB1 as an existing employment site. Due to its current use, access point and availability of other industrial units within Time Technology business park and other nearby industrial estates this site is unlikely to be attractive for unrelated employment development, but still presents some potential for a modest expansion to the existing Time Technology business park. **Our recommendation is that the site should be retained and protected for employment development in accordance with Policy DMB 1. It is further recommended that the site boundary is redrawn to fit the available space.**



## Conclusions

- 7.25 In summary, it is clear that Ribble Valley has very limited available employment space. Even if all of the existing and allocated sites retain their protection for employment uses going forward, the actual available supply only totals 7.34 ha (net), and some of this is likely to remain within the control of existing occupiers / owners of the surrounding industrial estate so may be unavailable on the open market.
- 7.26 There are generally strong levels of demand for industrial sites across Ribble Valley, but there is an imbalance in stock with the majority located in and around Barrow Brook Business Park in Barrow, and very little in the key settlements of Clitheroe, Longridge and Whalley.
- 7.27 Of the 12 sites assessed, whilst most rated as either 'good' or 'very good' in the scoring categorisation, there is a clear shortage of good quality and unconstrained employment sites.
- 7.28 Six of the sites we assessed are effectively built out and no have no remaining developable land. By far the largest site is the 5.06 ha site off Hey Road, Barrow Brook Business Park, although there remain concerns regarding the access into this site.
- 7.29 There remains a strategic need to ensure that there is a sufficient supply of good quality sites throughout Ribble Valley, but particularly in the three largest settlements and in the vicinity of the EZ given the potential spin off jobs that could arise there. There is a strategic need to unlock new sites in this area to ensure that future economic growth is not constrained.

## 8.0 Future Employment Land Requirements

### Introduction

8.1 This section considers the quantitative future economic growth needs in Ribble Valley. It models a range of scenarios over the Plan period 2021 to 2038. These scenarios consider the need for office and industrial (i.e. manufacturing and warehousing) floorspace. The final requirements are specified in floorspace (sqm) for E Class office (incorporating R&D), and land (in hectares) for E-Class light industrial, B2 and B8 uses.

8.2 As well as considering the baseline forecast growth using Experian’s most recent, Covid-19 adjusted June 2021 econometric projections, we have also compared this more pessimistic model run with the (pre-Covid) March 2020 iteration as well as a regeneration, or ‘policy on’ scenario, as well as taking into account past delivery of employment space and the potential labour supply generated by housing growth scenarios (based on data provided by Turley and used in their 2019 SHENA).

8.3 The forecast demand scenarios are based on a quantitative requirement and do not take into account qualitative factors that may influence the actual requirement.

### Methodology

8.4 The Government’s Planning Practice Guidance advises on how to calculate future employment land requirement. The Guidance<sup>27</sup> sets out that strategic policy making authorities will need to “develop an idea of future needs based on a range of data which is current and robust, such as:

- *sectoral and employment forecasts and projections which take account of likely changes in skills needed (labour demand)*
- *demographically derived assessments of current and future local labour supply (labour supply techniques)*
- *analysis based on the past take-up of employment land and property and/or future property market requirements*
- *consultation with relevant organisations, studies of business trends, an understanding of innovative and changing business models, particularly those which make use of online platforms to respond to consumer demand and monitoring of business, economic and employment statistics.*
- *Authorities will need to take account of longer-term economic cycles in assessing this data and consider and plan for the implications of alternative economic scenarios.”*

8.5 An aspirational ‘regeneration-led’ scenario has been included which takes into account additional demand that could be generated by key growth sectors, private sector developments and interventions.

8.6 The forecast employment land scenarios covering the 17-year Plan period from 2021 to 2038 are:

- 1 Baseline employment forecasts (**labour demand**), using Experian’s Local Market Quarterly Forecasts for June 2021 (compared to the pre-Covid 19 March 2020 projection);
- 2 Trending-forward **past jobs growth** experienced in the Ribble Valley over the long term, from 2001-2021;

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<sup>27</sup> Planning Practice Guidance – Reference ID: 2a-027-20190220

- 3 Estimated growth in the **local labour supply** and the jobs and employment space that this could be expected to support. This is based on Turley’s 2019 draft SHENA, which modelled the level of job growth that might be expected to be sustained under a series of demographic projections aligned with the Government’s Standard Methodology for calculating housing need and above; and,
- 4 Consideration of **past trends in completions of employment space** based on monitoring data collected by the Council, and how these trends might change in the future.

8.7 All these approaches reflect different factors and careful consideration needs to be given as to how appropriate each is to Ribble Valley’s particular set of circumstances and the policy aspirations of the Council. In addition, to be robust, the economic growth potential and likely demand for employment space needs to be assessed under different future sensitivities, to reflect lower or higher economic growth conditions arising in future.

8.8 The ultimate judgement regarding the level of employment need that the Council should plan for is not, therefore, simply shaped by a consideration of quantitative analysis. A range of qualitative factors should be taken into account, that would typically consider the quality and demand for existing premises, the spatial distribution of supply and demand for premises, and insights from commercial property agents and local businesses.

## **A. Econometric Job Forecasting**

8.9 Experian econometric job forecasts were obtained by Lichfields to underpin this analysis. It should be emphasised that such forecasts tend to be most reliable at regional and national scales and consequently less so at the local economy level. Nevertheless, they provide a valuable input in respect of understanding future land needs by indicating the broad scale and direction of economic growth in different sectors.

### **Scenario 1: Experian Baseline June 2021**

8.10 Experian’s model takes account of the existing economic structure of each Local Authority (broken down by economic sector) and the historical relationship between the regional performance of an industry and the performance observed at the Local Authority level. The forecasts of job growth by sector used here reflect recent trends and economic growth projections at national and regional level, and how economic sectors in Ribble Valley have fared relative to the North West region’s growth in the past. They are not constrained by either labour supply or land availability.

8.11 Before presenting the job growth outcomes from the scenarios it is worth highlighting in broad terms, limitations in how these were generated:

- 1 They are predominantly trend-based estimates projecting historic growth patterns into the future.
- 2 For the projections, the population data that underpinned the modelling comprises the Office for National Statistics [ONS] 2016 mid-year estimates [MYE] for 1997-2016. 2016-based sub-national population projections [SNPP] for England were also used by Experian.
- 3 The forecasts do not take into account policy influences and unforeseen impacts of individual business decisions.
- 4 There is not always a clear-cut relationship between employment change and employment land needs. Additional employment space may be required even if employment itself is falling; for example, if a manufacturing firm requires more space to enable greater automation and achieve job reductions through productivity gains.

- 8.12 Local area forecasts released by Experian in June 2021 provide an up-to-date view on the impact of Covid-19 for Ribble Valley. Though viewed as a very significant, albeit hopefully temporary shock, the forecasts imply a significant impact on all sectors of the economy and all parts of the region. The June 2021 projections take account of the latest Covid-19 position and revised macroeconomic assumptions more widely, including the Brexit agreement. They are used to consider impacts of the Covid-19 pandemic on the Ribble Valley's economy, both in the short term and the effect on its forecast growth over the longer-term Plan period. These local level employment forecasts are consistent with Experian's June 2021 UK macro forecast, with further detail on key assumptions summarised below:

**Experian Scenario Assumptions: June 2021**

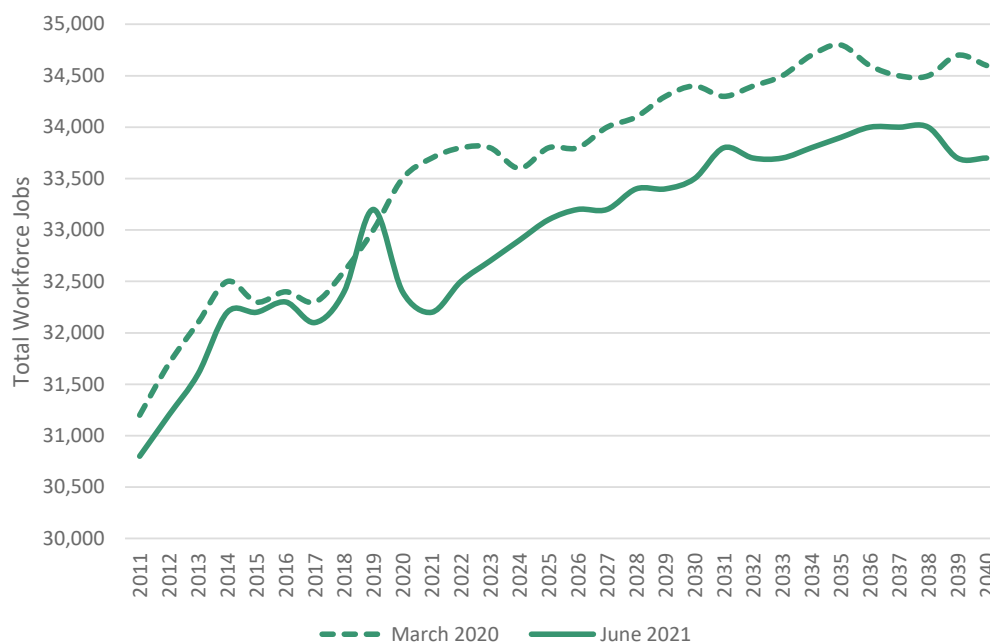
*The recovery path from the pandemic has panned out broadly in line with expectations, with the national lockdown remaining in place until the end of March, and restrictions now being gradually eased. This precedes a strong rebound in growth in the second and third quarter of the year as the economy reopens, supported by a rapid vaccine rollout initially to the most vulnerable cohorts. Consumer spending drives the increase in output, as savings accrued during the lockdowns are spent and pent up demand comes through.*

*As we approach the end of the year, we expect the uplift from consumer spending to fade as the initial exuberance surrounding the reopening of the economy eases, and government support for households is withdrawn. In particular, the unemployment rate is expected to rise to 6.4% in 2021 Q4, coinciding with the end of the furlough scheme. Despite this we expect GDP to return to pre-pandemic levels by the end of the year.*

*In the longer term we expect the pandemic to cause a small degree of lasting damage to GDP levels as a portion of jobs in some of the most severely impacted sectors are permanently lost. The Brexit deal agreed with the EU in December was broadly in line with our expectations and any adverse impacts largely from non-tariff barriers to trade were already built into our baseline forecast.*

- 8.13 Reflecting the greater than usual degree of uncertainty and variability attached to the most recent forecasts, they may need to be re-considered closer to the Local Plan examination stage depending on how the economic situation changes in the intervening period.
- 8.14 Figure 8.1 compares Experian's pre- and post-Covid projections for Ribble Valley Brough. They indicate that the later projection not only factors in a very significant fall in the total number of workforce jobs in 2020 and 2021 (of -1,000 from 2019 levels), but that it won't be until 2026 that we see a recovery to 2019 job levels. To put that in perspective, the UK economy is expected to return to 2019 employment levels by 2023 – 3 years earlier than Ribble Valley whilst for the North West as a whole, the recovery point is expected by Experian to be 2024. The projections also indicate that there is likely to be a permanent 'scarring' of Ribble Valley's economy, with job growth never catching up to the pre-Covid employment levels with a persistent gap of between 500 to 1,000 jobs for the remainder of the Plan period post 2026.

Figure 8.1 Change in Total Workforce Jobs in Ribble Valley (historic and projected) 2011 to 2040



Source: Experian UK Macro Economic Forecasts June 2021 / March 2020

8.15 A detailed breakdown of the various projections is provided in Table 8.1 for Ribble Valley (and comparator areas). The Table indicates that the June 2021 Experian baseline workforce employment projections reported a period of sustained employment growth since the depths of the last recession. Between 2001 and 2021, the Ribble Valley’s economy grew by 6,000 jobs, equal to a Compound Annual Growth Rate [CAGR] of 1.04 %. This is a much higher level of growth than the North West rate of 0.68% over the same time period, and also well above the UK-wide figure of 0.69%.

8.16 In contrast however, over the Plan period of 2021-38 the June 2021 projections reverse the growth trends with Ribble Valley forecast to experience a growth rate of just 0.326% overall (well below both the North West and UK growth rates). This growth rate is more than double the March 2020 Experian econometric projection, which forecast growth of only 800 workforce jobs over the next 17 years at a growth rate of just 0.14%. However, this is distorted to an extent by the fact that 2021 represents the low point of the pandemic from the perspective of workforce jobs, with much of the net 1,800 workforce job growth effectively representing lost growth in the previous 2 years.

Table 8.1 Workforce Jobs Growth for Ribble Valley and comparator areas

	2001-2021		Experian April 2021 Projections 2021-2038		Experian March 2020 Projections 2021-2038	
	Net Jobs Growth	CAGR	Net Jobs Growth	CAGR	Net Jobs Growth	CAGR
<b>Ribble Valley</b>	<b>6,000</b>	<b>1.04%</b>	<b>1,800</b>	<b>0.32%</b>	<b>800</b>	<b>0.14%</b>
North West	475,010	0.68%	278,960	0.42%	224,290	0.33%
UK	4,425,280	0.69%	4,120,890	0.66%	3,118,270	0.49%

Source: Experian UK Macro Economic Forecasts June 2021 / March 2020

8.17 Table 8.2 summarises those sectors expected to experience the largest absolute increases or decreases in employment for Ribble Valley over the Plan period. Experian project a growth equal to 1,800 net jobs between 2021 and 2038, driven in particular by Accommodation & Food Services (+500); Wholesale (+400); Health (+300); Professional Services (+300);

Administration & Supportive Services (+200); and Education (+200). Job losses are concentrated in one sector – manufacturing – which is projected to fall by 600 jobs over the next 17 years.

Table 8.2 Job Change across Ribble Valley (2021 to 2038)

Sector	2021	2038	Difference
Accommodation & Food Services	3,700	4,200	+500
Admin & Supportive Services	1,000	1,200	+200
Agriculture, Forestry & Fishing	1,400	1,400	0
Air & Water Transport	0	0	0
Computing & Information Services	0	0	0
Construction	2,300	2,400	+100
Education	2,800	3,000	+200
Extraction & Mining	0	0	0
Finance	300	300	0
Fuel Refining	0	0	0
Health	2,000	2,300	+300
Insurance & Pensions	0	0	0
Land Transport, Storage & Post	1,100	1,200	+100
Manufacturing	6,200	5,600	-600
Media Activities	0	0	0
Other Private Services	900	900	0
Professional Services	1,900	2,200	+300
Public Administration & Defence	800	800	0
Real Estate	400	500	+100
Recreation	700	800	+100
Residential Care & Social Work	1,500	1,600	+100
Retail	2,400	2,400	0
Telecoms	0	0	0
Utilities	0	0	0
Wholesale	2,800	3,200	+400
<b>TOTAL</b>	<b>32,200</b>	<b>34,000</b>	<b>+1,800</b>

Source: Experian (June 2021) / Lichfields' analysis  
 Key: **PURPLE** = Office/Industrial sector **GREEN** = Part Office/Industrial sector

- 8.18 In translating these jobs into employment land requirements, the analysis includes an allowance for jobs in other non-employment sectors that typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and some public administration activities. This is because a certain proportion of these jobs will occupy premises falling within the office/industrial sectors.
- 8.19 Using Experian's baseline forecasts (which are based to an extent on past trends and current representation across the industrial classifications relative to the national and regional

averages), Table 8.3 indicates modest growth in E(g)/B-class jobs for Ribble Valley, equal to 395 between 2021 and 2038, although this level of growth is outstripped by more than 3-times this level of growth in the non-B uses (notably Health, Education and Accommodation and Food Services). There is reasonable growth in office-based activities of 438; very modest growth of 78 light industrial jobs; continued declines in manufacturing employment; and moderate gains in distribution jobs (driven particularly by strong growth in wholesaling jobs).

Table 8.3 Forecast Employment Change in Ribble Valley 2021-2038 – Experian June 2021 Baseline Total Workforce Jobs

	Office*	Light Industrial**	B2 General Industrial***	B8 Warehousing****	Total Office / Industrial / Distribution Jobs	Other Jobs	Jobs in All Sectors
Ribble Valley	438	78	-507	386	395	1,405	1,800

Source: Experian June 2021 / Lichfields Analysis.

\* includes a proportion of public sector employment and administration & support services

\*\* includes some manufacturing, vehicle repair and some construction activities

\*\*\* includes manufacturing and some construction/utilities

\*\*\*\*includes elements of transport & communications sectors

8.20 In order to translate the resultant job forecasts into estimates of potential employment space it is necessary to allocate the level of employment change forecast for office, industrial, and wholesale / distribution uses as follows:

- 1 The office floorspace requirement is related to job growth / decline in the financial and business service sectors<sup>28</sup>;
- 2 The light industrial floorspace requirement is related to job growth / decline in some manufacturing sectors, specialised construction activities and some wholesale trades<sup>29</sup>;
- 3 The general industrial floorspace requirement is related to job growth / decline in the majority of manufacturing sectors<sup>30</sup>; and,
- 4 The wholesale / distribution floorspace requirement is related to job growth / decline in the industrial sectors of wholesale and land transport, storage and postal services.<sup>31</sup>

8.21 Lichfields has then translated the resulting figures into employment land projections using standard employment densities that have been applied to the forecast job change figures (based upon the latest HCA<sup>32</sup> Guidance on employment densities). These translate FTEs into workforce jobs, and plot ratios by use class.

8.22 For the purposes of this EELNS it has been assumed that:

- 1 One general office workforce job requires 12.5 sqm of employment floorspace (Gross External Area [GEA]);
- 2 One light industrial job requires 47 sqm of employment floorspace [GEA];
- 3 One general industrial workforce job requires 36 sqm of employment floorspace [GEA]; and,
- 4 One job per 65 sqm for general, smaller scale warehousing (assumed to account for around 60% of future space); 1 job per 71 sqm for medium scale units (assumed to account for 20%

<sup>28</sup> i.e. Majority of BRES Sectors 58-74, Office administration and support, some activities of membership organisations and a proportion of Public Administration and Defence

<sup>29</sup> Some printing and recording media; manufacture of computer and electronic products; some manufacture of furniture and repair & installation of machinery & equipment; majority of Specialised Construction Activities, plus car repair.

<sup>30</sup> Remaining Manufacturing sectors, plus some construction and waste and remediation activities.

<sup>31</sup> Wholesaling less car repairs retail car sales, plus post/couriers and land transport

<sup>32</sup> HCA (November 2015): *Employment Densities Guide, 3<sup>rd</sup> Edition*

of future space) and 1 job per 87.5 sqm for large scale, lower density units (also assumed to account for 20% of future space), based on CoStar data and discussions with agents)<sup>33</sup>.

- 8.23 The HCA Guidance takes account of recent trends in terms of the changing use of employment space, the main change being the more efficient utilisation of office space due to increased flexible working and hot-desking. This has resulted in a decrease in the amount of floorspace per office worker compared to previous guidance.
- 8.24 It is accepted that the current Covid-19 pandemic has dramatically altered working patterns, with the number of people working from home rising exponentially since the lockdown began in March 2020. UK-wide, in the period ending 3<sup>rd</sup> May 2021, the proportion of working adults that had travelled to work (both exclusively and in combination with working from home) was 60%. This proportion has been gradually increasing since mid-February (44% in the period 10 to 14 February 2021)<sup>34</sup>. Many commentators are suggesting that there will be a permanent shift towards home working and the greater flexibility this affords people, with the need for office space in particular falling significantly.
- 8.25 Whilst in our view it is quite likely that there will be some long-term shift in working patterns as a result of the pandemic, at the time of writing (October 2021) it is still too soon to say what the scale of that change on home working is likely to be. Until robust data is available later this year, we therefore propose to retain the aforementioned job densities, particularly as the HCA work already factors in an element of home working / hot desking into the calculations. That said, we have explored the potential impacts of any future need for Covid/health related measures in the sensitivity testing at the end of this chapter.
- 8.26 An adjustment has also been made to reflect the fact that a proportion of employment floorspace will always be vacant. Commercial and Industrial Property Research published by the VOA in 2005 indicates that for 2004/05, estimated vacancy rates for employment land totalled 10% for the North West region; 9% for England; and just 3% for Ribble Valley.
- 8.27 Other more recent sources are also now suggesting that a figure of around 7.5%<sup>35</sup> / 8% should be used to calculate the normal, or equilibrium vacancy rate. CoStar data indicates that as of Q4 2021 very few industrial units are currently vacant and almost no office space is available. However, these current levels of vacancy are historically low, with industrial vacancy having been as high as 11.2% in 2018 with office at around 4%. Therefore, it is sensible to apply a degree of flexibility to allow for market fluctuations.
- 8.28 Based on this data and discussions with local agents it is reasonable to suggest that the lower end of the 8-10% 'ideal' vacancy rate typically used for ELRs across the country represents a robust benchmark for an appropriate level of available floorspace going forward.
- 8.29 Where a reduction in jobs is forecast (e.g. manufacturing), the associated negative floorspace has been halved (in line with common methodological practice amongst ELRs undertaken elsewhere across the country), to reflect the fact that job decline at a particular company does not automatically translate into a comparable loss of floorspace, at least not in the short-medium term, due in part to companies being locked into leasing agreements etc.
- 8.30 The resultant floorspace estimates are provided in Table 8.4. They indicate an overall net gain of office/industrial floorspace in Ribble Valley of 30,225 sqm between 2021 and 2038. This is

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<sup>33</sup> Strategic, or large-scale warehousing is generally defined as a distribution unit over and above 100,000 sq ft (9,290 sqm+).

<sup>34</sup> Source:

<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/bulletins/coronavirustheconomyandsocietyfasterindicators/6may2021>

<sup>35</sup> Welsh Government (August 2015): Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan



driven by an increased demand for office, light industrial and particularly B8 (due to strong growth in wholesale), with a continued fall in demand for industrial floorspace.

Table 8.4 Forecast Net Floorspace Change (sqm) in Ribble Valley 2021-2038

	2021	2038	Net Requirement*
Office	43,700	49,169	+5,907
Light Industrial	40,578	44,267	+3,984
B2 General Industrial	249,622	231,354	-9,134**
B8 Logistics	215,645	242,931	+29,468
<b>Total Office / Industrial / Distribution</b>	<b>549,546</b>	<b>567,722</b>	<b>+30,225</b>

Source: Experian April 2021 / Lichfields Analysis

\*Factoring in an 8% vacancy allowance where the net requirement is positive

\*\*Net requirement halved as the job growth is negative

### Scenario 2) Pre-Covid Experian March 2020

- 8.31 As a sensitivity, this scenario mirrors the approach set out above, but instead of using Experian's June 2021 model run, it uses the equivalent from 18 months earlier. Crucially, this is pre-Pandemic and therefore factors in a more optimistic economic outlook, not just over the short term to 2023, but over the whole of the Plan period to 2038.
- 8.32 As can be seen from Table 8.5, the level of job growth across Ribble Valley is 800 over the 17 year plan period, which is 1,000 lower than the re-calibrated June 2021 model, although as discussed above, the discrepancy is due to the more recent model factoring in a V-shaped return to normality with the trough being in 2021; in actuality, the March 2020 model projects a larger economy by 2038, with 34,500 jobs compared to 34,000 in the June 2021 forecast.
- 8.33 The net E/B class job growth is actually negative, at -42. Furthermore, the split is very different, with a more modest growth in office jobs (+316 compared to 438 in the June 2021 projections) and a much stronger growth in warehousing jobs (535 jobs, compared to 386 in the June 2021 projections). The decline in the number of general industrial jobs is more severe in the pre-Covid projection, at -972, compared to -507 in the June 2021 version.

Table 8.5 Forecast Employment Change in Ribble Valley 2021-2038 – Experian March 2020 Baseline Total Workforce Jobs

Use class	Ribble Valley Jobs		Change
	2021	2038	2021-38
Office*	3,430	3,746	+316
Light Industrial**	863	942	+78
B2 General Industrial***	7,605	6,633	-972
B8 Logistics****	3,262	3,797	+535
<b>Total Office / Industrial / Distribution</b>	<b>15,161</b>	<b>15,118</b>	<b>-42</b>
Non B Class Jobs	18,539	19,382	+842
<b>Jobs in All Sectors</b>	<b>33,700</b>	<b>34,500</b>	<b>+800</b>

Source: Experian March 2020 / Lichfields Analysis.

\* includes a proportion of public sector employment and administration & support services

\*\* includes some manufacturing, vehicle repair and some construction activities

\*\*\* includes manufacturing and some construction/utilities

\*\*\*\*includes elements of transport & communications sectors

8.34 The resultant floorspace estimates are provided in Table 8.6. Paradoxically, even though Experian’s March 2020 model run projected a lower level of job growth than the April 2021 forecast, this equates to a slightly higher employment floorspace requirement. This is because the growth is directed towards the much lower density warehousing jobs than office, resulting in an overall net requirement of 31,626 sqm with a very high requirement for logistics (despite a higher net loss of general industrial floorspace).

Table 8.6 Forecast Net Floorspace Change (sqm) in Ribble Valley 2021-2038

	2021	2038	Net Requirement*
Office	42,880	46,825	4,261
Light Industrial	40,578	44,267	3,984
B2 General Industrial	273,780	238,791	-17,495**
B8 Logistics	230,608	268,455	40,875
<b>Total Office / Industrial / Distribution</b>	<b>587,846</b>	<b>598,339</b>	<b>31,626</b>

Source: Experian March 2020 / Lichfields Analysis

\*Factoring in an 8% vacancy allowance where the net requirement is positive

\*\*Net requirement halved as the job growth is negative

### Sensitivity Test: Past Trends Job Growth

8.35 This sensitivity test looks at past trends in jobs growth experienced in Ribble Valley over the long term (2001-2021) and trends the resultant Compound Annual Growth Rate [CAGR] over the Plan period from 2021-2038.

8.36 As set out above, over the long term, Ribble Valley’s economy has experienced strong growth levels over the past 20 years or so, with the expected blip in the immediate aftermath of the recession in 2009/10-2010/11. Over that period (2001-2021), the number of jobs in Ribble Valley increased by 6,000, or 1.036% per annum [CAGR], well above the regional rate of 068% and even the national rate of 069% over the same time period.

8.37 Applying this CAGR rate annually from 2021 onwards for Ribble Valley equates to a net job growth of 6,169 to 2038. Assuming the same sectoral representation for each industry in 2038 as the June 2021 Experian baseline, constrained to the aforementioned overall net job growth figures, would result in a strong office/industrial job growth of 2,288 to 2038 (see Table 8.7).

Table 8.7 Forecast workforce jobs change in Ribble Valley 2021-2038 – Past Trends

Use class	Ribble Valley Jobs		Change
	2021	2038	2021-38
Office*	3,496	4,439	943
Light Industrial**	863	1,063	200
B2 General Industrial***	6,934	7,252	318
B8 Logistics****	3,050	3,878	827
<b>Total Office / Industrial / Distribution</b>	<b>14,344</b>	<b>16,632</b>	<b>2,288</b>
Non B Class Jobs	17,856	21,737	3,881
<b>Jobs in All Sectors</b>	<b>32,200</b>	<b>38,369</b>	<b>6,169</b>

Source: Experian June 2021 / Lichfields Analysis.

\* includes a proportion of public sector employment and administration & support services

\*\* includes some manufacturing, vehicle repair and some construction activities

\*\*\* includes manufacturing and some construction/utilities

\*\*\*\*includes elements of transport & communications sectors

8.38 The resultant floorspace estimates are provided in Table 8.8. They indicate a very significant overall net gain in employment floorspace of around 98,413 sqm between 2021 and 2038 in Ribble Valley. The employment floorspace need is driven by a strong past growth in office jobs and particularly, B8 warehousing in recent years, with modest growth in general industrial uses too.

8.39 **It is considered that relatively limited weight can be attached to this modelling exercise as the past rates of job growth are of a different magnitude to the weaker Experian projections for 2021, which factor in the impacts of Brexit and Covid-19.**

Table 8.8 Past Trends workforce job growth net employment floorspace requirements 2021-2038

	2021	2038	Net Requirement*
Office	43,700	55,487	+12,730
Light Industrial	40,578	49,955	+10,127
B2 General Industrial	249,622	261,081	+12,376
B8 Logistics	215,645	274,145	+63,180
<b>Total Office / Industrial / Distribution</b>	<b>549,546</b>	<b>640,669</b>	<b>+98,413</b>

Source: Experian June 2021 / Lichfields Analysis

\*Factoring in an 8% vacancy allowance where the net requirement is positive

## B. Labour Supply

8.40 It is also important to take into account how many jobs, and hence how much employment space, would be necessary to broadly match the forecast growth of the resident workforce in the Ribble Valley. In contrast to the other approaches, this scenario focuses on the future supply of labour rather than the demand for labour. It indicates the amount of new jobs needed to align with the future working-age population, and how much employment space would be needed to accommodate these jobs.

8.41 Council Officers have requested that Lichfields model the jobs growth trajectories that have been generated by their housing consultants (Turley) during the production of Ribble Valley's draft SHENA (September 2019). As part of their assessments of housing need, Turley modelled the level of job growth that might be expected to be sustained under a series of demographic projections aligned with the Government's Standard Methodology for calculating housing need.

8.42 The SHENA notes that where housing provision is restricted to the minimum level set by the standard method (148 dpa), the modelling indicates that the population of Ribble Valley would be unlikely to support job growth over the emerging plan period. Indeed, it suggests that labour force capacity would likely diminish in such circumstances [paragraph 4.27].

8.43 The SHNEA goes on to quote figures produced by Experian (June 2019 model run) and Oxford Economics (2018 model run, produced for the Lancashire Enterprise Partnership) which suggested job growth of 0.2% and 0.1% per annum in the Ribble Valley respectively:

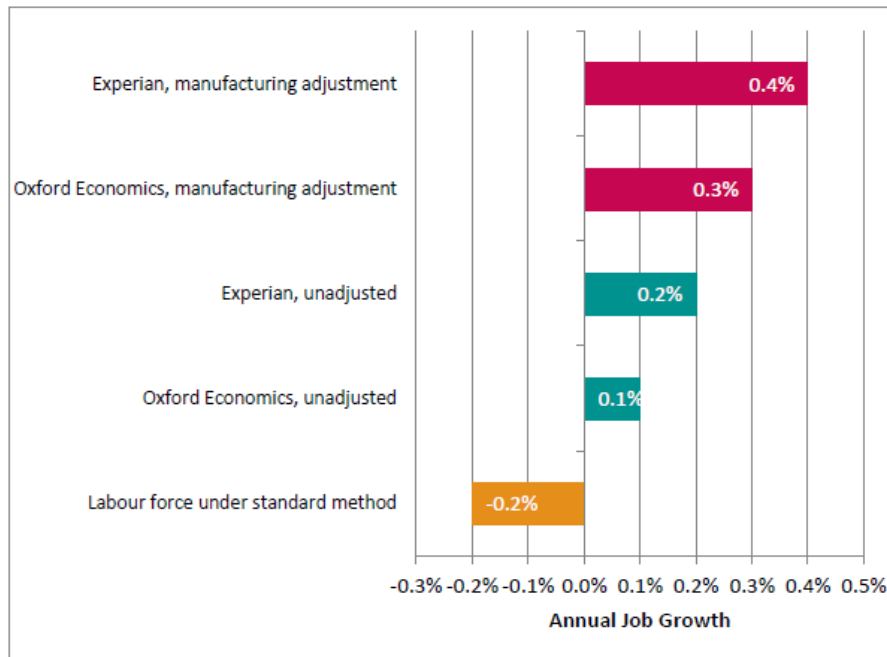
*“Each of the above forecasts assumes that employment in the manufacturing sector – recognised in the baseline report as the largest industry in Ribble Valley – reduces by around 13% over their respective horizons to 2033 and 2029, representing the largest absolute forecast change in any industrial sector. The manufacturing industry in Ribble Valley has actually proven to be fairly resilient in recent years, suggesting that the assumptions applied by global forecasting houses in this regard may overstate the future scale of decline in the manufacturing industry of this locality.”* [paragraph 4.31]

8.44 Turley go on to note that the applicability of any such assumption must also be considered in the context of wider economic strategy. The LEP has specifically recognised a forecast decline in

manufacturing employment, but has referenced ‘initiatives’ which ‘are underway to ensure this does not happen and that manufacturing sub-sectors with the potential to grow are fully supported’. “Where manufacturing employment is assumed to remain stable throughout the plan period, rather than decline, the overall rate of employment growth within the above forecasts increases to 0.3-0.4% per annum, highlighting their sensitivity to assumptions on the prospects of this key local sector.” [paragraph 4.32]

8.45 Turley modelled the following job growth scenarios, reproduced in Figure 8.2 below:

Figure 8.2 Job Growth Supported by Standard Method Relative to Forecasts (annual; 2018-33)



Source: Turley draft Strategic Housing and Economic Needs Assessment (September 2019): Figure 4.6

8.46 According to the SHENA, the standard method of 148 dpa equates to -0.2% employment growth per annum (-136 residents in total over the period 2018-33), which is unlikely to support job creation in Ribble Valley, and indeed can reasonably be expected to reduce the existing capacity of the labour force. Modelling by Edge Analytics indicates that up to 248 dpa would be needed in Ribble Valley to grow the labour force and support baseline employment growth at the upper end of the 0.1%-0.2% OE/Experian range in the Figure above [paragraph 4.51].

8.47 Further modelling produced by Edge Analytics for the SHENA confirms that providing for the existing Core Strategy housing requirement of 280 dpa throughout the period to 2033 would broadly support the labour force growth likely to be necessary to achieve the OE manufacturing jobs adjustment rate of job creation (0.3% per annum). The SHENA states:

*“It is concluded that housing need in Ribble Valley is likely to be higher than the minimum figures generated through the standard method, and likely to remain in the region of the existing requirement for 280 dpa. It is, however, recommended that this is kept under review given the early stage of the plan-making process, and the current absence of a full update to the employment land evidence and proposed policies. Where there is an identified evidenced need or strategic ambition to pursue a higher rate of employment growth than the 0.3% per annum introduced through the analysis in this report then the Council should consider the implications on the implied scale of housing need.” [paragraph 4.57]*

- 8.48 On this basis, we have taken forward 4 labour force scenarios from the SHENA, as follows:
- 1 Labour Force under Standard Method (148 dpa): -0.2% annual job growth;
  - 2 248 dpa (Experian unadjusted): 0.2% annual job growth;
  - 3 2019 SHENA / Core Strategy Housing Requirement (280 dpa): 0.3% annual job growth; and,
  - 4 Experian manufacturing adjustment: 0.4% annual job growth.

8.49 Scenario 7 represents a strong level of growth that could also be seen as representing a ‘policy on’ job growth scenario.

8.50 Table 8.9 shows how many additional jobs might be supported by population growth under the four scenarios above. The annual job growth has been applied to the total number of workforce jobs estimated by Experian to be based in Ribble Valley in 2021 (32,200). We can see that the resultant job projections range from a low of -1,077 for the SM 148 dpa figure, all the way up to 2,261 based on 0.4% annual job growth. By way of context, the March 2020 Experian projection indicated a net job growth of 8,000, equivalent to 0.138% p.a., whilst the more recent Experian June 2021 projection of +1,800 net job growth equates to a CAGR of 0.32%, which would be higher than 3 of the 4 SHENA scenarios, and slightly above the Core Strategy housing requirement figure of 280 dpa.

Table 8.9 Jobs supported by SHENA Projections for Ribble Valley, 2021-2038

	% Annual Job Growth	Total Job Growth
3) Labour Force under Standard Method (148 dpa)	-0.2% p.a.	<b>-1,077</b>
4) 248 dpa (Experian unadjusted)	+0.2% p.a.	<b>+1,112</b>
5) 2019 SHENA / Core Strategy Housing Requirement (280 dpa)	+0.3% p.a.	<b>+1,682</b>
6) Experian manufacturing adjustment	+0.4% p.a.	<b>+2,261</b>

Source: Turley (September 2019): Ribble Valley SHENA / Lichfields’ analysis

8.51 To translate this job growth into employment floorspace requirements, similar assumptions concerning vacancy rates and employment densities as per the econometric demand side forecasting work were applied to the job projections. As per the assumptions on manufacturing referred to above, we have assumed that general manufacturing employment will remain stable over the plan period, rather than declining as per Scenarios 3 and 4. Otherwise, it has been assumed that the projected employment split of office/light industrial and B8 jobs will mirror the Experian June 2021 projections in 2021 and 2038.

8.52 Under these scenarios, addressing the future employment requirements of local residents would result in a net requirement of between -10,270 sqm to 44,285 sqm of employment floorspace between 2021 and 2038 in Ribble Valley depending on the scale of housing provided.

Table 8.10 Ribble Valley net employment floorspace required from labour supply growth scenario 2021-2038 (sqm)

	Offices	Light Industrial	General Industrial	Warehousing	Total
3) Labour Force under SM (148 dpa) -0.2%	+1,413	<b>-28</b>	<b>-18,922</b>	+7,268	<b>-10,270</b>
4) 248 dpa (Experian unadjusted) 0.2%	+4,832	+3,017	<b>-11,475</b>	+24,159	<b>+20,533</b>
5) 2019 SHENA / Core Strategy Housing Requirement (280 dpa) 0.3%	+5,722	+3,818	0	+28,558	<b>+38,098</b>
6) Experian manufacturing adjustment 0.4%	+6,627	+4,632	0	+33,026	<b>+44,285</b>

Source: Lichfields’ analysis

## C. Estimating the Land Requirement

8.53 The next step involves translating floorspace into land requirements for office, industrial and warehousing uses. Land requirements have been calculated by applying appropriate plot ratio assumptions to the floorspace estimates:

- **Office/Industrial/Warehousing:** a plot ratio of 40% was applied, so that a 1 ha site would be needed to accommodate 4,000 sqm of employment floorspace.

8.54 The resulting net land requirements for the labour demand and labour supply scenarios are set out in Table 8.11. It ranges from a low of -2.57 ha (net) under the first labour supply scenario (equivalent to the SM 148 dpa housing target), to as high as 11.07 ha net under the 0.4% jobs growth labour supply / policy on Scenario 6.

Table 8.11 Ribble Valley net land requirements by labour demand and supply led scenarios (ha) 2021-38

Scenario	Offices	Light Industrial	General Industrial (B2)	Warehousing (B8)	Total
1) Experian June 2021 Baseline	1.07	1.00	-4.37	10.22	7.91
2) Experian pre-Covid March 2020 Baseline	1.48	1.00	-2.28	7.37	7.56
3) Labour Force under SM (148 dpa) -0.2%	0.35	-0.01	-4.73	1.82	-2.57
4) 248 dpa (Experian unadjusted) 0.2%	1.21	0.75	-2.87	6.04	5.13
5) 2019 SHENA / Core Strategy Housing Requirement (280 dpa) 0.3%	1.43	0.95	0.00	7.14	9.52
6) Experian manufacturing adjustment 0.4%	1.66	1.16	0.00	8.26	11.07

Source: Lichfields Analysis

## D. Past Development Rates

8.55 Because they reflect market demand and actual development patterns on the ground, in some situations long term completion rates of employment floorspace can provide a reasonable basis for informing future land needs, particularly where land supply or demand has not been unduly constrained historically. However, the future demand picture may not necessarily reflect past trends and some adjustments may be needed.

### Scenario 7) Past Developments Rates

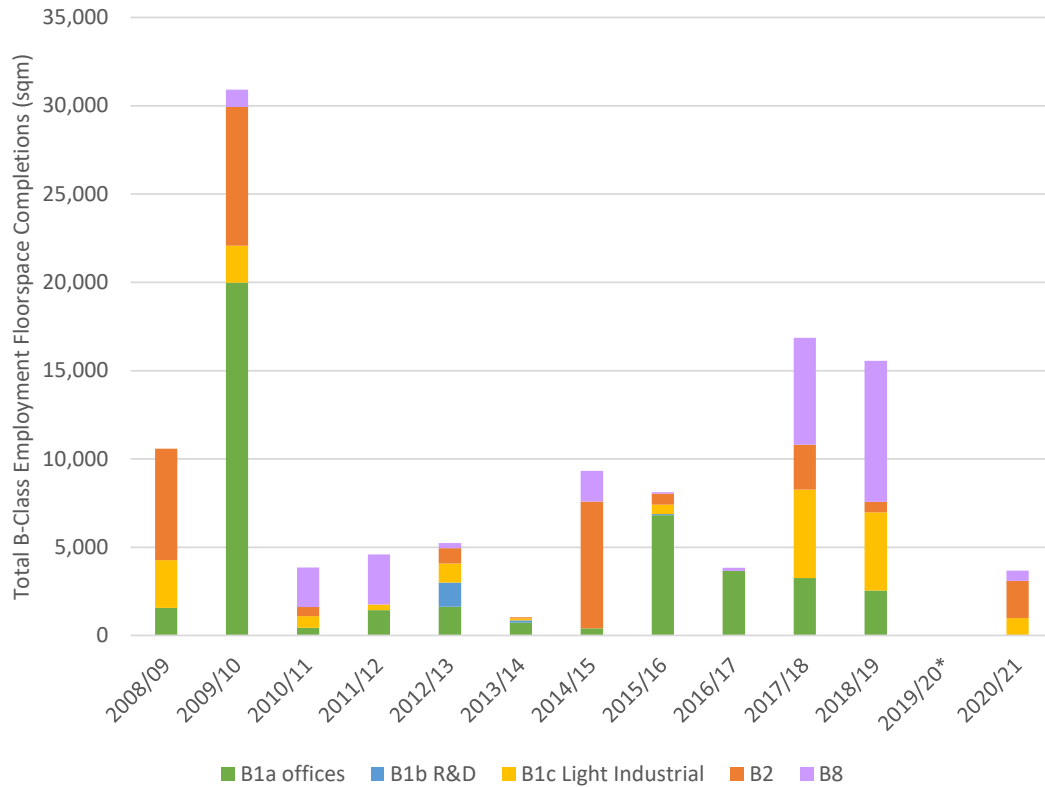
8.56 As set out in Section 6.0, monitoring data on past completions by B-Class uses between 2008/09 and 2020/21 was provided by Council Officers via their Annual Monitoring Reports. Data appears to be missing for 2019/20, as the floorspace figures in the AMR for that year are identical to those reported for the previous year which suggests the data is incomplete. Over this 12-year period (and excluding 2019/20), gross completions for B-Class uses in Ribble Valley amounted to 126,439 sqm, or 10,537 sqm per annum. This latter figure is equivalent to **2.63 ha per annum** if a standard plot ratio of 40% is applied.

8.57 Figure 8.3 indicates that on average delivery has been reasonably consistent over the 12-year period for which detailed records are available, although it has fluctuated with a range of 1,462 sqm in 2013/14 to 20,913 sqm in 2009/10, with a particular cluster around the 8,000 sqm – 15,000 sqm mark which the average figure of 10,537 sqm sits within.

8.58 Redistributing the non-specific, mixed B-Class element on a proportionate basis across the employment use classes, the majority of this has come forward for office (37.4%), general industrial (25.2%) or B8 warehousing (20.2%) uses, with just 1.2% coming forward for R&D and the remaining 15.8% for light industrial uses.

8.59 There is a peak in 2009/10 due to 19,975 sqm of office floorspace coming forward at BAE. This is almost as much as the total amount of office floorspace that has been delivered over the remaining 11 years (22,532 sqm, at an average of 2,048 sqm per annum) and as such it appears somewhat anomalous. If this office floorspace is removed, then the long-term average reduces to **9,043 sqm per annum**.

Figure 8.3 Gross Take-Up of (former) B-Class employment land in Ribble Valley, 2008/09 – 2020/21



Source: RVBC Council / Lichfields' Analysis  
 \*Data for this year appears to be unreliable.

8.60 Losses have fluctuated over the same 12-year period to 2021, peaking at 7,200 sqm in 2008/09, to a low of zero in 2014/15, 2017/18 and 2020/21. Overall, 32,538 sqm of B-Class land has been lost to alternative uses in the past 12 years, at an average of **2,712 sqm annually**. Deducted from the adjusted gross completions figure of 9,043 sqm, this equates to **6,331 sqm net per annum**.

8.61 Table 8.13 presents the net annual take-up for the Ribble Valley by Employment Use class. It indicates that once the 2,712 sqm annual losses are removed from the adjusted gross completions of 9,043 sqm, the net annual completion rate in Ribble Valley has been 6,331 sqm since 2008/09, with 2,000 sqm of this relating to office floorspace and 1,841 sqm for B8 warehousing.

Table 8.12 Ribble Valley Annual Average Take up / Losses of Employment Floorspace, 2008/09-2020/21 (sqm)

	Annual Gross Completions *	Annual Losses to alternative non B-Class uses	Annual Net Completions
E(g) (i) Office**	2,323	323	2,000
E(g) (ii) R&D	146	81	65
E(g) (iii) Light Industrial	1,694	340	1,354
B2 General Industrial	2,709	1,639	1,070
B8 Warehousing	2,171	329	1,841
<b>Total</b>	<b>9,043</b>	<b>2,712</b>	<b>6,331</b>

Source: RVBC / Lichfields Analysis

\*Data for 2019/20 has been excluded as it appears to be unreliable.

\*\*Excluding anomalous office data for 2009/10.

- 8.62 For the purposes of this scenario, we have trended forward this net annual figure over the 17-year plan period from 2021 to 2038. The data suggests that if past trends were replicated in future, then trending forward an annual net requirement of 6,331 sqm could justify the provision of 107,630 sqm (net) over the next 17 years in Ribble Valley. Applying a plot ratio of 40% as before, this equates to 26.91 ha (1.58 ha per annum).

Table 8.13 Ribble Valley Net Employment Space Requirements Based on Past Completions Trends, 2021-2038

	Scenario 7) Past Take Up (2021-38)	
	Total Net Floorspace Change (sqm)	Total Net Land Requirements (ha)
Total Net Floorspace	107,630	26.91

Source: RVBC / Lichfields Analysis

- 8.63 This approach assumes that past trends of development would continue unchanged, which may not fully reflect changes in the economy as it returns to growth. On the other hand, future development rates for industrial space may be lower than has been achieved historically as the sector rationalises and/or makes more efficient use of space.
- 8.64 It is understood that much of the take up in recent years relates to developments coming forward at the Samlesbury Aerodrome part of the Lancashire Enterprise Zone, where Britain's next-generation combat aircraft, the Lockheed Martin F-35, will be manufactured over the next 25 years.
- 8.65 The Samlesbury Aerospace Enterprise Zone offers flexible opportunities for office, light industrial, B2, and B8 units in the Advanced Engineering & Manufacturing sector. In total the site provides 50 ha of development land capable of accommodating up to 1 million sq ft of various uses within the advanced manufacturing sector, in a broad range of unit types and sizes, varying between 2,500 sq ft up to circa 350,000 sq ft<sup>36</sup>.
- 8.66 However, this is nearing completion on the Ribble Valley side at least, with virtually all of the remaining EZ land located to the south of the Ribble Valley boundary, in adjoining South Ribble.
- 8.67 In total the site provides 50 hectares (circa 120 acres) of development land capable of accommodating up to 1 million sq ft of various uses within the advanced manufacturing sector, in a broad range of unit types and sizes, varying between 2,500 sq ft up to circa 350,000 sq ft, although this appears to be located almost entirely in neighbouring South Ribble.
- 8.68 However, the Government has recently announced that the new National Cyber Force [NCF]

<sup>36</sup> [The Opportunities & Availability – Samlesbury Aerospace Enterprise Zone \(samlesburyez.com\)](https://www.samlesburyez.com)



headquarters will be sited on the Lancashire Enterprise Zone next door to the Samlesbury plant of BAE Systems. The joint MoD and GCHQ partnership will draw together personnel from intelligence, cyber and security agency GCHQ, the MoD, the Secret Intelligence Service (MI6) and the Defence Science and Technology Laboratory under one unified command for the first time<sup>37</sup>.

- 8.69 Defence Secretary Ben Wallace stated that the NCF in Samlesbury “*will embrace exciting new offensive cyber technologies and provide thousands of highly skilled jobs and expertise to the North West*”<sup>38</sup>. The proposal has been heavily trailed as part of the Government’s levelling up agenda, and it is clear that basing the campus at Samlesbury will bring high skilled and well paid jobs to the area, as part of the Government’s drive to move key public sector roles outside of London.
- 8.70 This is clearly a hugely exciting and significant development in this part of Lancashire, and one that could have a profound, long term impact on the area’s economy. However in the short to medium term, it is unclear how many of the proclaimed thousands of new hi tech cyber jobs will actually be based in Ribble Valley itself, as it seems likely at this stage that the development itself will be located entirely across the district boundary, in South Ribble given that is where the available land is in the EZ.
- 8.71 Therefore, in the short to medium term, it is likely that NCF-related employment based in Ribble Valley will be indirect. in the wider supply chain. This is not to say that it will not have a significant positive impact on the Ribble Valley’s economic growth prospects and the local housing market (which his already showing signs of becoming overheated), but rather it is likely that it may take some time to emerge.
- 8.72 Other factors suggest that past take up rates may not significantly increase in the future:
- 1 The move towards a more Business Services-orientated economy with significantly higher employment densities;
  - 2 The drive towards lower density logistics, with e-commerce and the retreat from the High Street that has been accelerated by the pandemic, pivotal;
  - 3 The continued restructuring of the traditional manufacturing economy with the potential for ‘recycling’ of older sites;
  - 4 The new E Class use, which includes office, R&D and light industrial uses alongside retail, and the potential for greater levels of losses as a result without the need for planning permission (although conversely this could potentially increase the need for new floorspace);
  - 5 The long-term impacts of the economic downturn as we emerge from the Pandemic and the continued uncertainty surrounding the long-term economic fallout from Brexit;
  - 6 The significant reduction in public sector spending available to deliver difficult brownfield sites; and,
  - 7 The need to consider alternative uses for existing employment sites (i.e. for Sui Generis uses).
- 8.73 On balance, for Ribble Valley, and having made an adjustment for the anomalous 2009/10 office completions figure, it is suggested that the 1.58 ha long term net annual past take up rate (Scenario 7) represents a realistic figure going forward over the remainder of the plan period. This should be regularly monitored by Council Officers and amended as necessary.

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<sup>37</sup> [www.gov.uk/government/news/permanent-location-of-national-cyber-force-campus-announced](http://www.gov.uk/government/news/permanent-location-of-national-cyber-force-campus-announced)

<sup>38</sup> *ibid*

## Flexibility Factor

- 8.74 To estimate the overall requirement of employment space that should be planned for in allocating sites, and to allow some flexibility of provision, it is normal to add an allowance as a safety margin for factors such as delays in some sites coming forward for development. This margin, or flexibility factor, is a contingency adjustment, providing a modest additional land buffer so that supply is not too tightly matched to estimated demand, and so that shortages of land do not arise if future demand turns out to be greater than the forecasts. Such flexibility is sensible given the uncertainties in the forecasting process and the scope for delays in developing employment space.<sup>39</sup>
- 8.75 The former South-East England Planning Partnership Board [SEEPB] guidance on employment land assessments recommended an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically about two years. Given the scale of Ribble Valley's economy, this is considered appropriate. The net margin set out above of **2,065 sqm of office floorspace (0.52 ha) and 4,266 sqm of industrial and warehousing land (1.07 ha)** was therefore used over two years, as set out in Table 8.13.

Table 8.14 Ribble Valley Safety Margin Allowances

Uses	Net Average Annual Take-up (ha)	2-year Safety Margin Added (ha)
Office and R&D	0.52	1.03
Light Industrial	0.34	0.68
General Industrial	0.27	0.54
Warehousing	0.46	0.92
<b>Total</b>	<b>1.58</b>	<b>3.17</b>

Source: Lichfields' Analysis

- 8.76 Drawing together the results from each of the economic scenarios, the following table summarises the net land requirements across the Plan period factoring in 2-years of flexibility uplift (equal to 3.17 ha). They range from an unsatisfactory 0.60 ha (Scenario 3 Labour Force under SM 148 dpa) all the way up to 30.07 ha (Scenario 7 Past Take Up).

<sup>39</sup> This safety margin is separate from the consideration of vacancy rate.

Table 8.15 Net Land Requirements for Ribble Valley (including flexibility factor) for 2021 to 2038 (ha)

		Offices / R&D (ha)	Light Industrial (ha)	General Industrial (ha)	Warehousing (ha)	Total (ha)
1) Experian June 2021 Baseline	Net	1.48	1.00	-2.28	7.37	<b>7.56</b>
	+ Flexibility Factor	2.51	1.67	-1.75	8.29	<b>10.72</b>
2) Experian pre-Covid March 2020 Baseline	Net	1.07	1.00	-4.37	10.22	<b>7.91</b>
	+ Flexibility Factor	2.10	1.67	-3.84	11.14	<b>11.07</b>
3) Labour Force under SM (148 dpa) -0.2%	Net	0.35	-0.01	-4.73	1.82	<b>-2.57</b>
	+ Flexibility Factor	1.39	0.67	-4.20	2.74	<b>0.60</b>
4) 248 dpa (Experian unadjusted) 0.2%	Net	1.21	0.75	-2.87	6.04	<b>5.13</b>
	+ Flexibility Factor	2.24	1.43	-2.33	6.96	<b>8.30</b>
5) 2019 SHENA / Core Strategy Housing Requirement (280 dpa) 0.3%	Net	1.43	0.95	0.00	7.14	<b>9.52</b>
	+ Flexibility Factor	2.46	1.63	0.54	8.06	<b>12.69</b>
6) Experian manufacturing adjustment 0.4%	Net	1.66	1.16	0.00	8.26	<b>11.07</b>
	+ Flexibility Factor	2.69	1.84	0.54	9.18	<b>14.24</b>
7) Past Take Up	Net	8.78	5.75	4.55	7.83	<b>26.91</b>
	+ Flexibility Factor	9.81	6.43	5.08	8.75	<b>30.07</b>

Source: Lichfields' Analysis

## Planning Requirements

- 8.77 While the net employment space requirements presented in Table 8.11 and the past take up scenarios in Table 8.13 represent the minimum recommended quantum of employment space to plan for in Ribble Valley over the plan period, **the Council will need to take a view on the extent to which additional space should be planned for over and above the net requirements, in order to allow for replacement of ongoing losses of employment space during the Local Plan period.**
- 8.78 There is usually a need to ensure a reasonable allowance that provides for some flexibility but avoids over-provision of land. The Council may wish to make a suitable allowance for the replacement of future losses of employment space that may be developed for other (non-office/industrial) uses over the plan period. Where such an allowance is factored into future employment space needs, it seeks to ensure that sufficient space is re-provided to account for employment space that could be lost moving forwards. It is intended, therefore, to provide some protection against the erosion of employment space over the plan period. This is a widely accepted approach in planning for future employment land needs.
- 8.79 Not all losses need necessarily to be replaced as some will reflect restructuring in the local economy as less space may be needed in some sectors in future. However, some replacement is needed to refresh the quality of the stock, provide choice and to avoid the employment land supply continually declining. This would be on the basis that the stock of employment land in Ribble Valley contains some older sites, particularly manufacturing and Victorian Mills, that are less likely to meet future needs and are of a scale that reflect past industrial patterns rather than the amount of land needed in future.
- 8.80 However, against this argument is the likelihood that other sites may also be lost by 2038, and these will represent losses to the overall land portfolio, reducing choice within the market.
- 8.81 As set out in Section 5.0, data provided to Lichfields by Council Officers indicates that losses have averaged **2,712 sqm, or 0.678 ha (@40% plot ratio)** per annum over the period 2008/09 to 2020/21 (again excluding the 2019/20 data for consistency with the net take up above), although this has reduced in recent years, with the past 5 year trend falling to 1,773 sqm

or **0.44 ha** per annum.

- 8.82 A further point to note is whether the past losses generally reflect the size of Ribble Valley’s economy, and whether this should be adjusted to allow for a degree of refurbishment to prevent the portfolio becoming increasingly unattractive to the market.
- 8.83 This alternative approach analyses the rate of ‘churn’, which would be equivalent to a proportion of Ribble Valley’s existing stock per annum. A number of other ELRs have used a replacement figure of around 1% per annum<sup>40</sup>, which would be the equivalent of the area’s entire stock being replaced over a period of 100 years. This has been acknowledged as a valid alternative approach (to adjusting for anticipated future losses) when translating net employment land needs into a gross planning requirement. A 0.5% replacement level would be the equivalent of the entire stock being replaced over 200 years. To put this into context, a widely used rule of thumb in the development industry suggests that high bay logistics units often have a much shorter shelf life of just 30-35 years before they become obsolete to modern distribution occupiers and require substantial refurbishment if not demolition and rebuild.
- 8.84 Other ELR studies<sup>41</sup> have noted that approximately 20% of historic completions have been achieved through (former) B-Use Class redevelopment (i.e. the re-use of formerly B-Use Class employment sites), with the remainder requiring new sites. This suggests that there will likely be a requirement for a high proportion of replacement activity on new sites to deliver new employment land supply to meet modern occupier needs.
- 8.85 Table 8.16 compares the rate of replacement needed for Ribble Valley’s office/industrial stock. It assumes that 0.5% / 1% of the existing commercial / industrial floorspace would be replaced per annum (based on the existing floorspace for each district using the latest Business Rates VOA data for 2020) and netting off a further 20% (assuming that 1 out of 5 sites will be recycled for employment use).

Table 8.16 Ribble Valley Replacement Rate Analysis (2021)

	Annual Replacement at 1%*	Annual Replacement at 0.5%*	% of Units built prior to 1940 (as at 2003)
Office	336 sqm (0.08 ha)	168 sqm (0.04 ha)	64.2%
Industrial & Warehousing	2,856 sqm (0.71 ha)	1,428 sqm (0.36 ha)	47.7%
<b>Total</b>	<b>3,192 sqm (0.80 ha)</b>	<b>1,596 sqm (0.40 ha)</b>	<b>52.0%</b>

Source: Lichfields analysis/VOA Business Floorspace (2021) / DCLG (2004): Age of commercial and industrial stock: local authority level 2004 (Table 3.1). \*Using a standard 40% plot ratio to translate office/industrial floorspace to land and netting off 20% replacement.

- 8.86 The Table indicates that the long-term rate of losses, 0.68 ha, is broadly in line with the level that might be expected given the size of Ribble Valley’s economy. Given its size, the Ribble Valley would need to be replacing around 0.8 ha of employment land per annum to refresh all of the stock in 100 years, whilst redeveloping 0.4 ha per annum would take 200 years to regenerate all of Ribble Valley’s current stock, which is clearly a less than desirable outcome. The 0.68 ha past trend rate of loss is closer to the upper end of this range.
- 8.87 Furthermore, as set out in the Table (and acknowledging that this is based on rather dated 2003 VOA information), Ribble Valley has a comparatively high proportion of older stock, with 64% of all office/factory/warehousing units dating from before WWII. This compares to 49% across the North West and 40% for England and Wales. This could suggest a higher rate of churn may

<sup>40</sup> See, for example, Lichfield District Council’s Employment Land Review 2014 Update and work covering the areas of: The West of England Updated Employment Evidence (Bath & North East Somerset, Bristol, North Somerset and South Gloucestershire) November 2018; Greater Exeter Economic Development Needs Assessment (Devon County, East Devon, Exeter, Mid-Devon, Teignbridge and Dartmoor National Park) March 2017 and Dartmoor National Park Employment Land Review, January 2018.

<sup>41</sup> West of England Joint Spatial Plan Area Updated Employment Evidence (2018)

be required to address the high proportion of older stock that is less likely to be fit to meet the needs of modern-day occupiers.

8.88 However, according to Council Officers, there are very few employment sites that are likely to be lost for employment uses for the foreseeable future. The Council's Strategic Housing Land Availability Assessment [SHLAA] has not been updated since 2013.

8.89 Balancing these considerations, it is accepted that factoring an element of future losses is not an exact science. The following factors have therefore been balanced in reaching a judgement as to the appropriate level of loss replacement:

- Historic losses have included a number of relatively small employment sites, including the piecemeal development of small infill parcels. Losses fluctuate from virtually nothing one year, to as high as 7,200 sqm the next (predominantly former B2 general industrial uses). The loss of larger sites would potentially have a greater impact on the demand-supply balance at the local level;
- Current rates of loss, at 0.68 ha per annum (over the longer term), would be broadly in line with the level of employment land that would need to be replaced if around 0.68% of the entire Ribble Valley's stock were replaced annually;
- Movements between the range of uses that fall within the new E use class no longer require planning permission because they no longer constitute 'development', which could result in more office/light industrial land being lost than previously. The Permitted Development Rights streamlining 'office and light industrial E Classes to residential' conversion may therefore exacerbate losses over the short to medium term.
- Whilst losses have declined to 0 ha in 2021, it is difficult to disentangle this latest figure from the unprecedented economic crisis resulting from the Pandemic.

8.90 Mindful of the factors outlined above, it is considered that on balance, and, given the uncertainties involved, it is prudent to plan for a replacement figure equal to long term past rates, which equates to **0.68 ha**. This should be monitored by the Council over the coming years and adjusted as necessary. This sits within the 0.5-1% annual replacement range and takes into account the views of agents and developers on the need to replace and rejuvenate Ribble Valley's existing floorspace over the course of the plan period. It also balances the ageing stock against the lack of losses currently in the pipeline. Over 17 years, this would see the replacement of **11.52 ha**.

8.91 In summary, the demand-led range of total gross land requirements to 2038, factoring in a 2-year margin of choice, results in the following demand projections for Ribble Valley. The scenarios range from a low of 12.12 ha (Scenario 3 Labour Force under SM) to the Past Take Up (Scenario 7) figure of 41.6 ha. The other 5 scenarios cluster between 20-26 ha. These are broadly in line with the findings of the 2013 ELR Update, which identified a need for between 10.55 ha and 30.31 ha, which we would expect to be slightly lower given that this was based on a 16 year, rather than 17-year, plan period:

- 1 Econometric demand-led projections: 22.25 ha – 22.60 ha;
- 2 Labour Supply projections: 12.12 ha – 25.76; and,
- 3 Past Take Up: 41.6 ha.

Table 8.17 Ribble Valley Gross Employment Land Comparisons 2021-2038

		Offices / R&D (ha)	Light Industrial (ha)	General Industrial (ha)	Warehousing (ha)	Total (ha)
1) Experian June 2021 Baseline	Net	1.48	1.00	-2.28	7.37	7.56
	+ Flexibility Factor	2.51	1.67	-1.75	8.29	10.72
	<b>+ Loss Replacement</b>	<b>4.23</b>	<b>3.12</b>	<b>5.22</b>	<b>9.69</b>	<b>22.25</b>
2) Experian pre-Covid March 2020 Baseline	Net	1.07	1.00	-4.37	10.22	7.91
	+ Flexibility Factor	2.10	1.67	-3.84	11.14	11.07
	<b>+ Loss Replacement</b>	<b>3.82</b>	<b>3.12</b>	<b>3.13</b>	<b>12.54</b>	<b>22.60</b>
3) Labour Force under SM (148 dpa) -0.2%	Net	0.35	-0.01	-4.73	1.82	-2.57
	+ Flexibility Factor	1.39	0.67	-4.20	2.74	0.60
	<b>+ Loss Replacement</b>	<b>3.10</b>	<b>2.11</b>	<b>2.77</b>	<b>4.14</b>	<b>12.12</b>
4) 248 dpa (Experian unadjusted) 0.2%	Net	1.21	0.75	-2.87	6.04	5.13
	+ Flexibility Factor	2.24	1.43	-2.33	6.96	8.30
	<b>+ Loss Replacement</b>	<b>3.96</b>	<b>2.87</b>	<b>4.63</b>	<b>8.36</b>	<b>19.82</b>
5) 2019 SHENA / Core Strategy Housing Requirement (280 dpa) 0.3%	Net	1.43	0.95	0.00	7.14	9.52
	+ Flexibility Factor	2.46	1.63	0.54	8.06	12.69
	<b>+ Loss Replacement</b>	<b>4.18</b>	<b>3.08</b>	<b>7.50</b>	<b>9.46</b>	<b>24.21</b>
6) Experian manufacturing adjustment 0.4%	Net	1.66	1.16	0.00	8.26	11.07
	+ Flexibility Factor	2.69	1.84	0.54	9.18	14.24
	<b>+ Loss Replacement</b>	<b>4.41</b>	<b>3.28</b>	<b>7.50</b>	<b>10.58</b>	<b>25.76</b>
7) Past Take Up	Net	8.78	5.75	4.55	7.83	26.91
	+ Flexibility Factor	9.81	6.43	5.08	8.75	30.07
	<b>+ Loss Replacement</b>	<b>11.53</b>	<b>7.88</b>	<b>12.05</b>	<b>10.15</b>	<b>41.60</b>

Source: Lichfields Analysis

8.92 The various projections for Ribble Valley are illustrated in Figure 8.4, demonstrating the narrower cluster of 5 of the 7 scenarios between 20 ha and 26 ha.

Figure 8.4 Comparison of Ribble Valley’s employment land requirements for 2021 to 2038 (hectares)



Source: Lichfields’ Analysis

## Reality Check

8.93 Clearly the levels of future demand for employment land projected by the various projections differ. The projections are largely trend-based; in particular, the past take up has been (at least partly) recorded during an unprecedented recession in the commercial market nationally. It is likely that the actual performance of Ribble Valley’s economy and commercial property market will lie somewhere between the econometric and past trends projections.

8.94 In order to provide a clearer steer as to what level of growth Ribble Valley should be planning for, it is important to apply reality checks.

## Take Up Rates

8.95 The Council’s Annual / Authority Monitoring Report [AMR] provides employment land take up data in floorspace (sqm) rather than by hectareage. The previous 2013 ELR appears to have assumed that the plot ratio was 100%, i.e. that there was no allowance for car parking, service yards, landscaping, internal estate roads etc, so that the floorspace had 100% land coverage. It is generally standard practice to apply a plot ratio, which generally varies from 35% to 45% for relatively low density industrial estates and business parks, although high density office blocks in City Centres usually have a much higher density that can be as high as 200% or more. Given the characteristics of Ribble Valley’s existing commercial and industrial market we have applied an industry standard figure of 40%. If 100% plot ratio were applied as per the BE Group ELR, then this would reduce the Take Up Scenario figure from 41.6 ha to just 16.63 ha.

8.96 We have already made an adjustment for the seemingly anomalous office take up in 2009/10, but otherwise trended past take up rates forward on a constant basis since 2008/09.

## **Replacement of Losses**

- 8.97 The scenarios considered in the preceding paragraphs include an allowance for the replacement of losses at 100% of past trends (once adjusted for an element of redevelopment on existing sites, equal to around a fifth of the overall land take). This is considered to be appropriate, having regard to the scale and nature of historic losses and the lack of large-scale employment losses in the pipeline.

## **Post Covid Impact on Employment Densities**

- 8.98 As set out earlier in this Report, it is accepted that the current Covid-19 pandemic has dramatically altered working patterns, with the number of people working from home rising exponentially since the lockdown began in March 2020. Many commentators are suggesting that there will be a permanent shift towards home working and the greater flexibility this affords people, with the need for office space in particular falling significantly. Examples could include the need for social distancing in terms of desk-spacing and layouts, less sharing of desks, and more communal space. Conversely, the impact may actually be to increase densities, with a higher proportion of the workforce working from home, and rotating the use of desk space to minimise the number of people in the office at any given point in time, which may actually have the effect of increasing densities.
- 8.99 The modelling currently assumes that one general office workforce job requires 12.5 sqm of employment floorspace [GEA]. If employment densities were to decrease by, say, 20%, to 15 sqm, then the land requirements would only increase by around half a hectare. Conversely, if more people were to work from home but still come into the office a few days a week, perhaps to a smaller office but with a similar number of staff as before, and employment densities actually increased by 20% (to 1 job per 10 sqm), then this would reduce the level of employment land needed by a similar amount.
- 8.100 Either way, our view remains that it is likely that there will be some long-term shift in working patterns as a result of the pandemic, it is still far too soon to say what the scale of that change on home working is likely to be. The sensitivity test demonstrates that we would have to see a fairly profound shift in office employment densities to have a significant impact on the level of employment land needed overall.



## 9.0 Demand Supply Balance

### Introduction

9.1 This section draws together the forecasts of future employment land needs in Section 8.0 and sets this against the estimates of land available on the area's potential employment sites to identify whether there is any need for additional employment space, or whether there is a surplus of it, in both quantitative and qualitative terms.

### The Need for Employment Land in Ribble Valley

9.2 This report has appraised a range of employment land projections for Ribble Valley using a variety of methodologies in accordance with the PPG. It has used the latest modelling data from Experian; labour supply scenarios including the recently updated standard methodology for calculating housing need; and updated past take up rates and losses data.

9.3 In interpreting the outputs of Section 9.0, regard should be had to the PPG which states that LPAs should assesses the need for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period. It is also important to recognise that there are inevitable uncertainties and limitations associated with modelling assumptions under the future growth scenarios considered. For example, there are some inherent limitations to the use of local level economic forecasts, particularly in the context of significant recent changes in the economy and the unforeseeable ongoing issues concerning the Covid-19 pandemic and Brexit. Economic forecasts are regularly updated and the resulting employment outputs will change over the plan period.

9.4 Seven different scenarios of future employment space requirements have been considered based on a range of lower and higher growth conditions that could arise in the future, plus a sensitivity test based on past trends jobs growth. The Experian baseline scenario (Scenario 1) forecasts a lower level of jobs growth than has been experienced in recent years, of 1,800 net workforce jobs between 2021 and 2038. This equates to a CAGR of 0.32% growth annually, well below the 1.036% recorded in Ribble Valley over the period 2001 to 2021. If this higher CAGR were applied to the 2021 workforce jobs growth figure, this would suggest a growth of 6,169 workforce jobs over the 17-year plan period, almost 3.5-times higher than Experian's latest forecasts. The pre-Covid-19 projection (Scenario 2) is lower, at just 800 net jobs growth, although paradoxically generates a higher level of employment land need due to the higher representation of use classes (notably B8 logistics) requiring a higher land take for a given workforce.

9.5 The labour supply projections were based on Turley's SHENA modelling and ranged from a negative job growth of -1,077 if the SM2 148 dpa housing target is pursued, through +1,682 jobs based on the current Core Strategy housing target of 280 dpa, and up to +2,261 net jobs growth if a 'policy on' growth target of 0.4% per annum is pursued.

9.6 Past take up, which aligns with the former 'predict and provide' approach to identifying employment land needs, indicates that the Council has been successful in attracting new companies to the area, with a total of 126,439 sqm of employment land delivered over the past 12 years. This equates to 10,537 sqm, or 2.63 ha per annum. Making an adjustment for an unusually high level of office floorspace that was delivered in 2009/10, and projecting this forward 17 years, this results in a need for 41.6 ha gross, including an allowance for a flexibility factor/margin of choice and loss replacement.

9.7 As set out in Section 5.0, Ribble Valley currently contains an estimated 400,000 sqm of employment floorspace, comprising of 42,000 sqm of office stock and 357,000 sqm of

industrial/warehousing space. Translated to employment land (and working on the basis of 40% plot ratios, this equates to just under 100 hectares of employment land in total. This provides a useful benchmark for assessing the scale of change (in gross terms) implied by each of the scenarios considered in the preceding paragraphs.

9.8 In relation to the future demand for employment land:

- Scenario 1) Experian June 2021 Baseline generates a requirement for 22.2 ha (gross) of employment land. This would be equivalent to an 22% increase in stock;
- Scenario 2) March 2020 Experian Baseline generates a requirement for 22.6 ha (gross) of employment land. This would be equivalent to an 23% increase in stock;
- Scenario 3) LF under SM 148 dpa (-0.2%): generates a requirement for 12.1 ha (gross) of employment land. This would be equivalent to an increase in stock of 12%;
- Scenario 4) 248 dpa (0.2%): generates a requirement for 19.8 ha (gross) of employment land. This would be equivalent to an increase in stock of 20%;
- Scenario 5) 2019 SHENA/CS 280 dpa (0.3%): generates a requirement for 24.2 ha (gross) of employment land. This would be equivalent to an increase in stock of 24%;
- Scenario 6) Experian manufacturing adjustment (0.4%): generates a requirement for 25.8 ha (gross) of employment land. This would be equivalent to an increase in stock of 26%; and,
- Scenario 7) Long Term Past Take Up generates a requirement for 41.6 ha (gross) of employment land. This would be equivalent to 42% increase in stock.

9.9 This range, between 12% and 42%, may seem quite high, particularly at the upper end of the range; however, this has to be set against the fact that the Council is planning for a 17-year period. At the lower end of the range, and if continued at that rate, it would take Ribble Valley 140 years to replace all of its stock, falling to 41 years at the upper end of the range. Both extremities look undesirable.

9.10 The clustering of requirements for the other five scenarios around the 20 ha - 26 ha mark appears more reasonable and would take between 66 and 86 years to replace all of the Ribble Valley's stock. Furthermore, and as we have demonstrated elsewhere in this report, there are considerable opportunities that could arise from the Government's new £5bn digital warfare centre at Samlesbury, even if this is likely to be constructed just across the border in South Ribble. The potential for spin off economic benefits for Ribble Valley from this once in a generation growth opportunity are huge, but as yet have not been fully quantified. The timeframe for the site's delivery is also unconfirmed although a date of 2030 has been quoted in the local press, well within the Plan's lifetime.

9.11 **As such, it is Lichfield's view that the upper end of the cluster of scenarios, equal to around 26 ha gross, or 14 ha net (Policy 6, Experian manufacturing adjustment 0.4%), would be the upper end that the Council may wish to plan for, with the latest Experian projection of 22 ha gross (11 ha net) at the lower end of any range (Scenario A). The 26 ha upper end could be considered a 'Policy On' projection, but should be monitored closely as plans for the step change NCF development are worked up in further detail. It may well be appropriate to upscale the requirement depending on the nature of the proposed development at Samlesbury, particularly if further land is required to be released on the Ribble Valley side of the EZ's boundary. This would be a judgement for the Council to make and hence the gross figures are indicative only.**

- 9.12 If the housing requirement is at, or below, the 280 dpa under labour supply Scenario 5 then this could have repercussions on the employment land range, which may have to be narrowed as a consequence to ensure the two are not misaligned.

### **Quantitative Need, by Use Class**

- 9.13 In terms of how the 11-14 ha net / 22-26 ha gross employment land requirement for Ribble Valley could be split between the Use Classes, the following quantitative and demand-based factors should be taken into account:
- 1 Historical changes to the stock of existing employment space show that the level and share of office space has increased by 250% in recent years (albeit from a very low base) to 42,000 sqm between 2000/01 and 2020/21, whilst the level of industrial space has increased at a much slower rate of just 4% over the same period. 357,000 sqm of industrial floorspace is located in Ribble Valley according to VOA figures for 2020/21, which is over 8-times higher than the volume of office space.
  - 2 By 2038, 33.1% of commercial/industrial jobs are projected to be in higher employment density office space (up from 30.4% currently), compared to 67% in lower density industrial space.
  - 3 Around 17% of the employment floorspace needed based on the Experian projections (Scenario 1) is needed for office, compared to c. 83% industrial land. This rises to 19% for office floorspace based on the pre-Covid Experian projection, with the remaining 81% of need identified for industrial (particularly general industrial and warehousing).
  - 4 Since 2008/09, 23% of employment land completions have related to office space, compared to 42% for B1c/B2 industrial land and 21% for B8 warehousing and logistics. Much of the industrial take up has taken place at, or in the immediate vicinity of, Samlesbury Enterprise Zone, which is now reaching capacity on the Ribble Valley side of the district boundary although substantial available land remains in South Ribble.
  - 5 Samlesbury Aerospace Enterprise Zone [EZ], which is partly located in Ribble Valley and partly in South Ribble, provides business units from 2,500 sq ft to 350,000 sq ft on the UK's newest Advanced Engineering & Manufacturing Park immediately adjacent to BAE Systems, one of the world's most advanced, technology-led defence, aerospace and security solutions companies. When fully developed, the Samlesbury Aerospace Enterprise Zone will be a national centre of excellence for advanced engineering and manufacturing related companies in B1, B2 and B8 units ranging from manufacturing, specialist logistics and professional support services<sup>42</sup>.
  - 6 The recent Government announcement that a £5 billion investment at the EZ to accommodate the National Cyber Force campus is a potential game changer, but is likely to come forward in the South Ribble part of the EZ which still has available developable land. Even so, the prospect remains of thousands of jobs coming to this part of central Lancashire which would at the very least generate thousands of construction jobs in the short to medium term, and potentially thousands of highly skilled spin off jobs in IT and cyber technologies. Whilst it is impossible to say at this point how many of these direct and indirect jobs could be based in Ribble Valley, and when they might be expected to come forward, nevertheless the Council will need to ensure that it has a sufficiently large and flexible portfolio of sites that can react positively to any new development opportunities likely to arise as a result of this once in a generation investment in the area.

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<sup>42</sup> [www.samlesburyez.com](http://www.samlesburyez.com)

9.14 Taking the above factors into account, it is suggested that the following indicative split of office/industrial employment space could be appropriate for Ribble Valley over the period 2021 to 2038:

- 1 **25% for office; and,**
- 2 **75% for industrial/distribution.**

9.15 This balances the high levels of industrial land that have come forward for development in recent years (c.77% of the total amount of employment land take up since 2008/09) against the stronger growth prospects for traditionally office-based hi-tech sectors (with spin off employment resulting from the National Cyber Force Campus balanced by the increased demand for advanced manufacturing and construction). The considerable uncertainty regarding changing work practices presented by the Pandemic and further uncertainties concerning the implications of Brexit means that these conclusions should be revisited by the Council and monitored as and when new data on the fallout from the 'new economic normal' becomes more clearly apparent in the years to come.

This report does not seek to make a planning or policy judgement; this is a matter for the Council when taking account of the information before them. The report therefore represents a first stage upon which to base further consideration of all relevant factors emerging through the Local Plan process.

On this basis, the recommended employment land need for the Council is:

**11-14 ha net / 22-26 ha gross between 2021 and 2038 (depending on the scale of loss replacement the Council wishes to make allowance for)**

Of this figure, it is suggested that around 75% should be identified for industrial / warehousing, and the remaining 25% for new office space.

9.16 The selection of the final employment land requirement will depend upon the preferred level of employment growth for Ribble Valley and the extent to which Officers consider that this aligns with the Council's growth aspirations, including the need to reduce net out commuting and balancing economic considerations with housing needs. The level of employment growth will be based upon the identification of policy aspirations relating to the promotion of key advanced manufacturing and IT sectors in accordance with the economic and spatial vision for the area and the prospects for growth from the £5 billion investment at Samlesbury EZ.

### **Forward Supply**

9.17 The detailed site appraisals discussed in Section 7.0 and Appendix 1 provide a snapshot of the current available employment land within Ribble Valley. This section compares the identified level of available land with anticipated requirements to understand the extent to which further new allocations may be required.

9.18 In terms of how the employment land requirements relate to the current employment land portfolio, various factors make any such quantitative analysis an inexact science. On the supply side of the equation the total amount of land available at any given point in time is indeterminate. The exact amount depends upon:

- 1 The size of private reserves (i.e. industrial land held with existing buildings for expansion). These are normally excluded from the analysis as they are not generally available for development;
- 2 The number of windfall sites arising which are not presently allocated for employment uses, but which may become available for such uses in future; and,

- 3 The number of further sites becoming available through the recycling of land currently in industrial use.

9.19 Bearing these points in mind, and as set out in Section 7.0, the detailed site surveys provide a snapshot of the current available employment land across the authority. This comprises:

- 1 Current employment sites formally allocated in the Local Plan;
- 2 Existing employment sites that are not currently part of Ribble Valley’s allocated employment land supply but were assessed to determine whether they are suitable for such uses. These sites may not currently be employment sites or were suggested in the ‘call for sites’ process; and,
- 3 Other sites with extant planning permission for B-Class uses.

9.20 This judgement is not based solely on the grade given to a particular site but is informed by a rounded consideration of factors set out in the previous Practice Guidance including:

- 1 The suitability of the site in accordance with the development plan, emerging plan policy and national policy;
- 2 Market and industry requirements in the Ribble Valley;
- 3 Physical limitations or observable problems such as access, infrastructure, ground conditions, flood risk, hazardous risks, pollution or contamination;
- 4 Potential impacts including the effect upon the natural and built environment, including landscape features, nature and heritage conservation;
- 5 Appropriateness and likely market attractiveness for the type of development proposed; and,
- 6 Environmental/amenity impacts experienced by would be occupiers and neighbouring areas.

9.21 It should also be noted that the site assessments have not been informed by detailed site investigation work or site ownership information (other than where this has been provided by the client) and no detailed viability analysis has been undertaken.

9.22 As part of the study, 12 sites were assessed and all were considered suitable for employment use totalling 7.34 hectares of net available land. Based on these site assessments in Section 6 alone, basic quantitative comparison of estimated demand for B Class space against the identified supply is presented in Table 9.1. When set against the demand forecasts, Ribble Valley has a quantitative undersupply of employment land available based on the sites assessed.

Table 9.1 Demand/Supply of Employment Space in Ribble Valley

	<b>Demand / Supply Balance (2021)</b>
Requirement for Commercial / Industrial Space (ha)	<b>22 - 26 ha</b>
Estimated Supply of Employment Space (net) (ha)	<b>7.34 ha (5 sites)</b>
Surplus (+) / Shortfall (-) (ha)	<b>- 14.66 to -18.66 ha</b>

Source: Lichfields Analysis

9.23 To recap, the supply situation is as follows.

9.24 The Ribble Valley Housing and Economic Development DPD (adopted October 2019) allocated 4 ha of additional employment land, on 3 sites:

- Policy EAL1 Land at Sykes Holt, Mellor (1.7 ha);
- Policy EAL2 Land at Time Technology Park, Simonstone (0.8 ha); and,

- Policy EAL3 Land at Higher College Farm, Longridge (1.55 ha).

9.25 Of these three, Land at Sykes Holt, Mellor, now accommodates Thwaites' national headquarters following their relocation out of Blackburn. The new brewery building is complete, and the site also features a new heritage centre and stables for the firm's iconic shire horses. To all intents and purposes, the site is no longer available as part of Ribble Valley's employment land supply moving forward.

9.26 Land at Time Technology Park, Simonstone has also been largely built out, although a small parcel of land remains which is currently in use for a car park, but which has extant planning permission to be redeveloped for an additional 4 business units totalling c.700 sqm. This is estimated to equate to around 0.15 ha, down from the 0.8 ha original allocation.

9.27 As for the remaining site, Land at Higher College Farm, Longridge, this totals around 1.55 ha and until recently had an extant planning permission in place for 2,592 sqm of B1, B2 and B8 floorspace in 8 units, plus the conversion of the existing farmhouse to the south of the site to office accommodation would provide an additional 476 sqm. A subsequent application for outline planning permission for 21 dwellings and associated works was refused in June 2019. The appeal was also dismissed by an Inspector on 21<sup>st</sup> December 2020.

9.28 At best therefore, the Council's employment land allocations could contribute **1.7 ha** across two sites.

9.29 As for the sites Lichfields assessed as part of our comprehensive site assessment exercise, excluding the Time Technology Park and Higher College Farm sites already referenced above, only 4 had any remaining developable land within the site boundaries, and one of these (Land North of Barrow Brook Business Village) effectively sits within a larger site.

9.30 Of the remaining three sites:

- **5.06 ha on Land at Hey Road, Barrow.** This site also encompasses the Land North of Barrow Brook Business Village site. This forms part of the Barrow Enterprise Site (Policy DS1) and is a Committed Employment Site (Policy DMB1). The site is further identified as principle location for employment development under Key Statement EC1 in the adopted Core Strategy. Whilst this should remain part of the Council's employment land portfolio, issues over an access strip to the south have contributed to it not coming forward to date. A potential access slip road is included in the layout under application 3/2021/0759, although difficulties were identified in achieving suitable access for HGVs onto the A59.
- **0.08 ha at the Hindle and Schofield site, Barrow Brook Business Park.** This comprises of a small area of undeveloped land in the Barrow Enterprise Site which currently has approval for both office and industrial/trade counter uses (3/2019/0304 and 3/2021/0397).
- **0.50 ha on Land adjacent to Simonstone Lane, Time Technology Park, Simonstone.** The site is brownfield land that currently comprises an under-utilised open storage area towards the rear of the existing Time Technology Business Park, and which at best is likely to form expansion land for the existing companies based to the south.

9.31 In addition to this 7.34 ha, there are a small number of committed but undeveloped employment sites that will contribute towards addressing the shortfall identified.

9.32 These were not appraised by Lichfields, but include:

- Land at Chapel Hill Longridge for B2 units (0.23 ha);
- Land South of Blackburn Rd Longridge (1.69 ha) with outline consent (3/2020/0507 for B1c/B2/B8 uses and 3/2019/0666 for B1/B8 uses); and,

- 2.25 ha within the Standen Strategic site (DMB1) at Clitheroe.

9.33 **In total these sites contribute some 4.17 ha towards the identified 7.34 ha supply above, bringing the total to 11.51 ha of committed/allocated employment land available for development.**

9.34 There is also an application (3/2021/1262) which has just been received by the Council for the erection of 4 commercial units (Use Class E) which appears to involve an extension to the Chapel Hill site.

9.35 As part of the plan making process the council will therefore need to identify suitable, available sites to meet its employment needs.

9.36 **The potential shortfall therefore, against a need of between 22 and 26 ha, is at the very least 10.49 ha, and potentially as much as 14.49 ha depending on whether the Council decides to pursue an employment land requirement at the upper or lower end of the recommended range.**

9.37 This demand and supply analysis assumes that the undeveloped employment allocations come forward in their entirety for employment development over the plan period. Any significant deviation from this broad assumption would have an impact upon the overall balance, for example by tightening the existing surplus of employment space or resulting in an increase in the shortfall under some of the more optimistic scenarios.

9.38 In purely quantitative terms therefore, this suggests that the identified pipeline supply as it currently stands, is unlikely to provide sufficient employment land to meet Ribble Valley's economic development needs to 2038.

## **Qualitative Factors**

9.39 Even where no quantitative shortfall of employment space is identified, in some circumstances additional land may be needed for qualitative reasons, in order to:

- a Improve the choice of provision for occupiers;
- b Meet gaps in the supply of particular types of premises;
- c Improve or modernise the quality of current provision and so help attract more occupiers; and/or,
- d Provide a better spatial distribution of employment sites to meet the needs of different settlements.

9.40 Qualitative needs are considered for each broad property type below.

## **Industrial Needs**

9.41 Agents indicated that the market for industrial floorspace in Ribble Valley has seen unprecedented demand throughout 2021, with little-to-no floorspace available. This is the case for both larger warehouse type units and smaller units for start-ups or small manufacturing / trade counter uses. For example, recent developments such as the 48 new warehouse units at Twin Brooks industrial estate north east of Clitheroe (which benefits from excellent strategic road network access) was fully let before completion with a waiting list in place for any new availability. These units were developed by local developer James Alpe Ltd who stressed that there is strong demand from firms looking to locate in Ribble Valley and they are keen to develop further industrial units. James Alpe Ltd also commented that they (like many other local businesses) are in need of more space but cannot find suitable premises.

- 9.42 Similarly, smaller industrial units are also said to be in high demand. For example, the completed units at Mitton Road Business Park which are suitable for smaller manufacturing and trade counter uses are also fully occupied with a waiting list in place for those units under development and future phases. This is despite the location's somewhat constrained strategic road network access, indicating a diverse range of demand from smaller firms for whom strategic road access is less vital.
- 9.43 Agents reported that the high levels of demand for all types of industrial floorspace are slowly pushing up industrial rents. This is confirmed by CoStar data, which indicates a steady increase in rents over the past 5 years from around £4 per sq ft in 2016 to around £6 in 2021. Lack of supply is also pushing sale values of industrial space closer to that of office space.
- 9.44 There is an obvious preference for units along the A59 corridor, but smaller firms are swiftly occupying available units even in more rural areas. Agents suggested that where possible, these more rural business parks should be expanded to their full potential as there is strong demand for units below 5,000 sq ft in size, whilst anything larger in these locations may be less desirable. At the same time, larger industrial units are also in high demand and the Borough represents a strong opportunity for potential developers where appropriate land to be made available. However, with the current lack of land availability with good strategic road network access in Ribble Valley other nearby authorities have the upper hand.
- 9.45 Overall, stakeholders indicated that demand for industrial space is strong for both smaller and larger units with firms lining up for space as it becomes available. The A59 corridor is a clear preference for firms looking to move into Ribble Valley but smaller units are playing a valuable role for local firms.

### **Office Needs**

- 9.46 Much like the industrial market, agents considered that the office market had performed strongly in 2021 with high levels of demand for space in Ribble Valley and a general lack of available space in the market. The little office space that is currently available is generally of poor quality and often within larger industrial developments such as Time Technology Park.
- 9.47 Whilst there are high levels of demand it was stressed that demand tends to be for smaller space of the type seen at smaller business parks and within modest business centres. However, agents did mention that developers are keen to find build-to-rent opportunities in nearby authorities and if land were made available for new development within Ribble Valley there would likely be plenty of interest.
- 9.48 Demand is predominantly focussed on Clitheroe due to its rail links and local amenities, with second preferences generally being for Whalley and Longridge. However, former residential or agricultural office spaces in more rural locations such as Gisburn, Brockhall Village and isolated locations all play a role in the local market.
- 9.49 As indicated by CoStar data, market rents for office space in Ribble Valley have risen at a rate above the long-term trend in 2020 and 2021, rising from around £11.60 per sq ft in Q1 2020 to around £12.40 in Q4 of 2021.
- 9.50 Overall, agents noted a general lack of office availability across Ribble Valley with a high level of demand. This demand tends to come from smaller firms with predominantly local workforces, although agents also felt the market would respond well to a wider variety of spaces coming forward.



9.51 However, it was acknowledged by stakeholders that whilst both markets are performing well and there is a general lack of office and industrial employment space on offer, there remains a higher overall demand for industrial space with this being the key opportunity in Ribble Valley.

### **The Need for Additional Land**

9.52 As outlined above, there is an identified under-supply of between 10.5 and 14.5 ha of employment land based on the site assessments over the plan period to 2038.

9.53 As a consequence, it is suggested that the Council gives consideration to identifying and allocating additional sites that are considered to be suitable and deliverable for office / industrial / warehousing uses. Any new sites should be sustainable and, ideally, located within areas of strong market demand. Agents confirmed that the areas of Clitheroe, Whalley, Longridge and the A59 corridor should be the primary locations for new development.

9.54 There are clear shortages in the larger towns of the Ribble Valley, notably Clitheroe, Longridge and Whalley where fresh supply is very much at a premium. Overall, it is suggested that efforts to identify new employment allocations could be focussed in these areas.

9.55 Furthermore, as set out above, the recent Government announcement that a £5 billion investment at the EZ to accommodate the National Cyber Force campus is a potential game changer. Even though it is likely to come forward in the South Ribble part of the EZ which still has available developable land, this is likely to generate thousands of jobs in this part of Lancashire. It would at the very least generate thousands of construction jobs in the short to medium term, and potentially thousands of highly skilled spin-off jobs in IT and cyber technologies. The Council will need to ensure that it has a sufficiently large and flexible portfolio of sites that can react positively to any new development opportunities likely to arise as a result of this once in a generation investment in the area. It would appear an obvious point, but the search for new sites to service this wider supply chain could also be directed to the immediate environs of the EZ as it sits within Ribble Valley, notwithstanding the Green Belt policy constraints which would require careful consideration.

9.56 It will also be important in considering the potential to identify additional allocations to ensure that the supply of sites is, wherever possible, clustered together or focussed on a smaller number of larger parcels of land – rather than dispersed across a wide portfolio of sites. Such an approach can help to provide an appropriate concentration of employment uses that can contribute towards securing the necessary investment, business infrastructure and occupier interest.

### **Potential Additional Supply**

9.57 Both the quantitative and qualitative analyses highlight that there is a need to identify new employment land allocations in Ribble Valley. Ensuring an adequate choice of types of sites is vital if the needs of different employment sectors are to be met.

9.58 The Council did not request that Lichfields assess any potential sites which are not currently allocated, do not benefit from extant planning permission for employment development, or are not part of a committed employment site. Nevertheless, during our site visits we identified a few opportunities to extend existing employment areas that could be explored by the Council as part of its future site appraisal process.

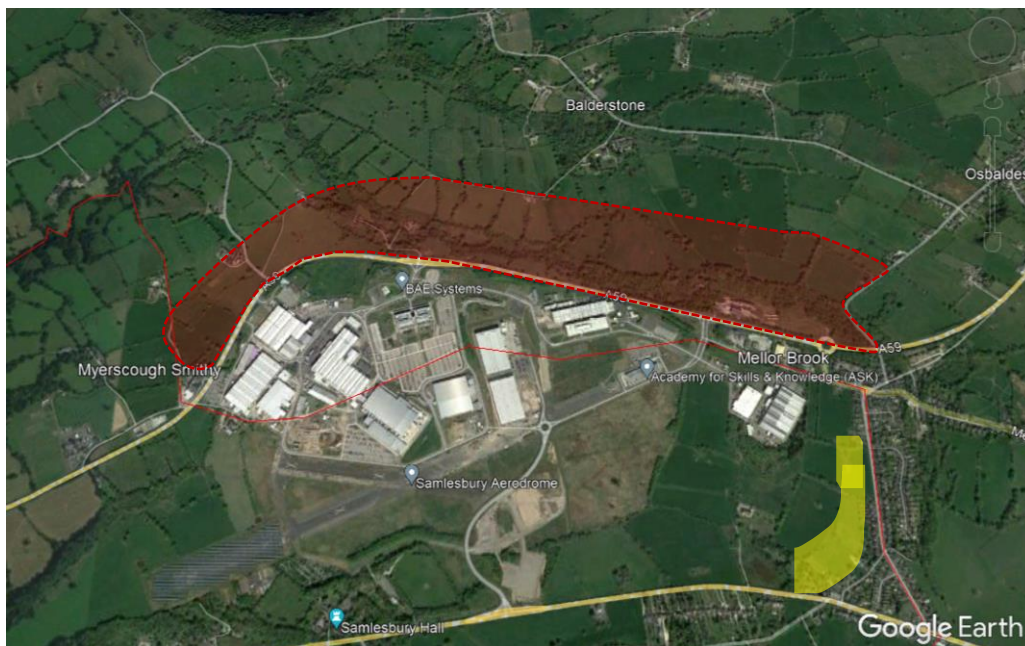
9.59 The Council may choose to allocate a quantity of employment land over and above the identified employment land need target, not least to provide for flexibility and churn in the market especially bearing in mind the quantum of poorer premises and the need for refurbishment / redevelopment of these sites. Other issues could include uneven distribution across the Ribble

Valley, or that it was felt that the modest supply of sites in recent years, and therefore employment developments coming forward, had resulted in unmet, or spatially imbalanced, demand across the Ribble Valley and the supply chain opportunities presented by the National Cyber Force Campus.

9.60 Some of the potential sites would require release from the Green Belt. Such cases should be reviewed by the Council who would need to weigh the specific case for each site against the merits of retaining the existing Green Belt boundaries to test whether exceptional circumstances can be demonstrated through the emerging Local Plan process. Lichfields has not undertaken a Green Belt Review and has assessed the merits of individual sites solely for the purpose of identifying potential employment sites. Therefore, no consideration has been made as to whether exceptional circumstances exist for the release of individual Green Belt sites in the Ribble Valley.

9.61 Sites which could be explored further include the following extensions to existing employment areas:

- **Greenfield sites north of the A59 and the Samlesbury Enterprise Zone (approx. 70 ha additional):**



- **Expansion Land to the south and east of Mitton Road Business Park (to include Phase 3 development and beyond) (approx. 4.3 ha additional):**



- **Fort Vale Engineering, Calder Vale Park – rationalisation of the site and extension to the north and west (approx. 4.0 ha additional):**



9.62

These sources of sites amount to an estimated potential gross developable area of **78 ha** (although the net developable area is likely to be substantially lower than this once environmental constraints on the site north of the Enterprise Zone are accounted for). This would be in addition to the identified supply of 11.51 ha net existing and allocated employment

space. We have not appraised these sites in detail but suggest that they could be considered alongside other sites put forward as part of a comprehensive call for sites exercise by the Council.

## Conclusions

- 9.63 Based on an identified need of between **22 ha to 26 ha** of employment land, the quantitative assessment of demand and supply balance identified a potential deficit of between 10.5 and 14.5 ha of employment land, based on the site assessments over the plan period to 2038. Given the paucity of undeveloped employment sites in the Ribble Valley and the general good quality of the sites that are available, we recommended that all of the 12 sites we appraised should retain their current protection for employment use.
- 9.64 As well as considering the quantitative balance of supply and demand, the assessment considered qualitative factors that should be taken into account when determining the appropriate sites portfolio. With most demand in Ribble Valley being for industrial / warehousing uses, businesses increasingly need modern and new build premises that enable them to compete effectively. Many of the surveyed businesses reported that they intend to expand in future years, but are struggling due to a lack of appropriate larger sites or are grappling with the challenges of gaining planning permission in order to expand their current premises. Some respondents indicated that the lack of suitable premises in Ribble Valley may force them to relocate outside of the Ribble Valley, whilst 53% of those who has searched for new premises expressed difficulty in doing so, stating a lack of smaller modern office sites with access to fast internet and local services; a lack of medium sized industrial units for SMEs looking to upscale; and, a lack of warehousing space over 30,000 sq ft in size.
- 9.65 The qualitative review also highlighted that the spatial distribution of supply and demand is out of sync, with virtually nothing available in the main settlements of Clitheroe, Whalley, Longridge or in the vicinity of the Enterprise Zone at Samlesbury. With a shortage of suitable sites where there is greatest demand, Ribble Valley is at risk of losing businesses to other areas, as well as risking potential inward investment from businesses looking to move into the Ribble Valley.
- 9.66 After taking into account the quantitative and qualitative factors influencing the balance of supply and demand in Ribble Valley, potential extensions to existing employment areas were identified. This involved 3 sites covering 78 ha (gross) and should be explored in further detail by the Council alongside other potential sites as part of the Local Plan call for sites exercise.

## 10.0 **Conclusions and Policy Recommendations**

10.1 This section draws together overall conclusions and considers potential policy approaches in relation to employment space for the emerging Ribble Valley Local Plan as well as other measures which may be required to support the Council's economic growth objectives.

### **Context**

10.2 The future growth scenarios considered in this study indicate the broad scale and type of growth associated with different approaches to modelling employment space requirements for Ribble Valley over the period 2021 to 2038. To varying degrees, these scenarios reflect both the indigenous growth needs in Ribble Valley as well as a degree of footloose demand that operates within a wider East Lancashire sub-regional market that overlaps with the other Pennine Lancashire districts that comprise the FEMA. The importance of flows of labour, residents and businesses and the resultant inter-relationships between the other districts across Pennine Lancashire should be recognised and used to inform planning policy under the Duty to Co-operate.

10.3 In the context of the NPPF and the Practice Guidance, the policy approach adopted by the Council should aim to positively plan to support the employment needs of Ribble Valley so that the local economy is not unduly constrained over the plan period. This should also recognise issues around a severely restricted employment land supply and competing pressures on available development sites.

10.4 In order to ensure a flexible and responsive policy framework for the Ribble Valley, it will be necessary not just to concentrate on meeting the forecast quantitative requirements for office and industrial space in Ribble Valley (which will fluctuate over time) but to reflect the opportunities and risks that flow from particular policy approaches. This could include how the delivery of employment land can be prioritised in particular areas and for particular uses, or how inward investment opportunities can be delivered. This could particularly draw and capitalise upon the once in a generation growth opportunity provided by the Government's proposed £5 billion investment in a new digital warfare centre at Samlesbury Aerospace Enterprise Zone.

10.5 In this context, it is important that planning for employment growth in the Ribble Valley is balanced against pressures from other land uses. Commercial and industrial floorspace also competes with a wide range of other non-employment uses (which fall outside of the remit of this study), many of which would also generate benefits to Ribble Valley's economy or have identified needs that the NPPF indicates should be duly supported.

10.6 To meet the future requirements for office and industrial space in Ribble Valley over the period to 2038, it will be necessary for the Council to make difficult choices in the emerging Local Plan concerning which new employment sites to allocate for employment use, given the lack of available brownfield sites and the rural and Green Belt policy designations protecting much of the Ribble Valley.

10.7 These judgements must ultimately take account of the following:

- 1 The local benefits of employment sectors and the need to sustain a diversified and resilient economy that is able to capitalise on economic growth opportunities as they arise as we emerge from the severe challenges presented by the pandemic.
- 2 The economic and market outcomes that would arise if particular sectors become displaced from the economy, or are otherwise constrained from expanding in the Ribble Valley. This is a particular issue for Ribble Valley as revealed in the Business Survey, which suggested

that many respondents needed to expand their operations, but could not find suitable alternative premises in the Ribble Valley and may have to look elsewhere in Pennine Lancashire as a consequence.

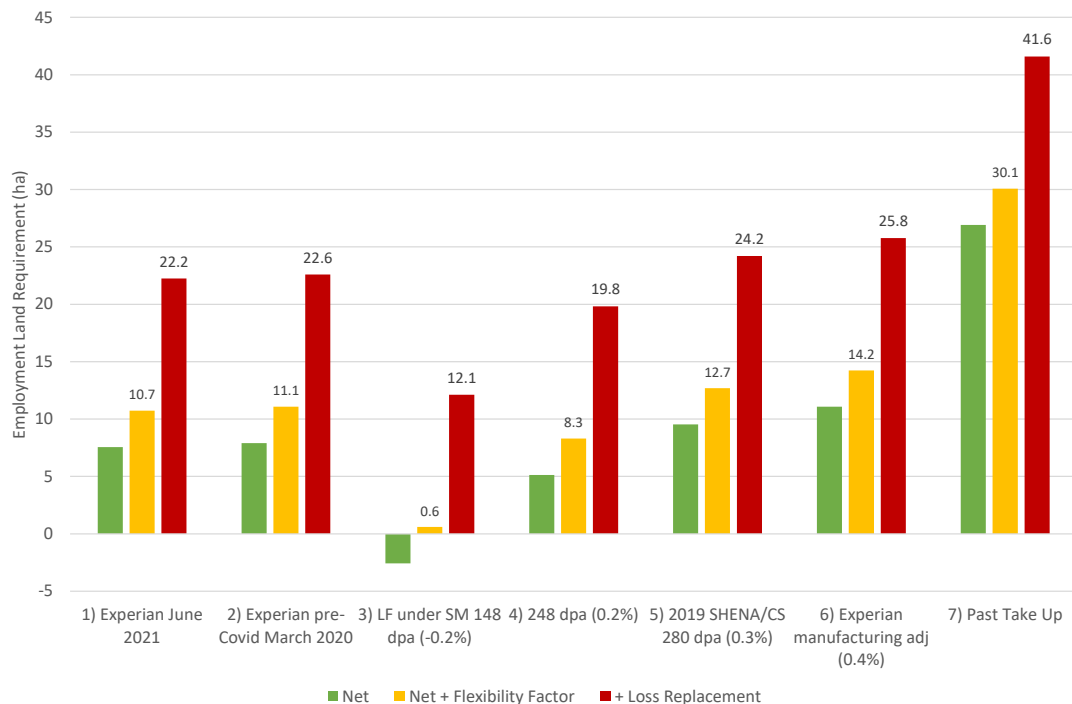
- 3 The need to promote growth in high value employment roles in Ribble Valley that meet the aspirations of resident workers and potentially build upon the existing supply chain supporting the aerospace hub at Samlesbury EZ.
- 4 The trade-off between seeking more intensive use of the current supply of sites and thereby yielding higher net job creation over time, and identified business needs (as specified in the NPPF) which may for some activities or sectors imply a less efficient use of land in order to function effectively.
- 5 Maintaining a delivery trajectory for employment space with short, medium and longer-term opportunities over the life of the Plan.

10.8 The policy choices ultimately adopted by the Council should, as far as possible, seek to plan for a choice of employment sites and locations to support the needs of particular businesses and sectors. In this context, some further commentary around the potential options for accommodating the needs of the office and industrial market in Ribble Valley over the period to 2038 is set out below.

### Demand / Supply Results

10.9 This report has appraised a range of employment land projections for Ribble Valley using a variety of methodologies in accordance with the PPG. It has used the latest modelling data from Experian (both post and pre-Pandemic); labour supply scenarios including the recently updated standard methodology for calculating housing need; and updated past take up rates and losses data. The results are summarised in Figure 10.1.

Figure 10.1 Ribble Valley Employment Land Projections (2021-2038)



Source: Lichfields

- 10.10 To ensure a flexible and responsive policy framework, it will be necessary not just to focus on meeting forecast quantitative requirements (which will fluctuate over time), but to consider the opportunities and risks that flow from particular policies or types of land allocations. This might concern how delivery can be prioritised in some locations which have few at present (such as Clitheroe), or for some types of employment uses such as advanced manufacturing, or how scope can be created for meeting as yet undefined inward investment opportunities.
- 10.11 It is recommended that the upper end of the cluster of scenarios, equal to around 26 ha gross, or 14 ha net (Policy 6, Experian manufacturing adjustment 0.4%), would be the upper end that the Council may wish to plan for, with the latest Experian projection of 22 ha gross (11 ha net) at the lower end of any range (Scenario A). The 26 ha upper end could be considered a 'Policy On' projection, but should be monitored closely as plans for the step change NCF development are worked up in further detail. It may well be appropriate to upscale the requirement depending on the nature of the proposed development at Samlesbury, particularly if further land is required to be released on the Ribble Valley side of the EZ's boundary. This would be a judgement for Ribble Valley Council to make and hence the gross figures are indicative only.
- 10.12 It is further recommended that around 25% of land be allocated for office, with the remaining 75% for B2 and B8 industrial/logistics. This balances the high levels of industrial land that have come forward for development in recent years against the stronger growth prospects for traditionally office-based hi-tech sectors (with spin off employment resulting from the National Cyber Force Campus balanced by the increased demand for advanced manufacturing and construction). The considerable uncertainty regarding changing work practices presented by the Pandemic and further uncertainties concerning the implications of Brexit means that these conclusions should be revisited by the Council and monitored as and when new data on the fallout from the 'new economic normal' becomes more clearly apparent in the years to come.

## Supply

- 10.13 A total of 12 sites have been assessed as part of this employment land review comprising a total of 14.36 ha gross area. The detailed review of the site's included the area's locational context, accessibility, constraints, market demand, market conditions, compatibility of neighbouring uses and relevant planning factors to form a judgement of the suitability of the site for employment use. The individual proformas are included in Appendix 1 of this report. All were considered suitable to be retained for employment use, which provides a forward supply of 7.34 ha of net available land. To this would be added 4.17 ha relating to 3 other commitments / allocations that Lichfields was not asked to appraise, bringing the total forward supply up to **11.51 ha**.
- 10.14 When set against the demand forecasts, Ribble Valley has a quantitative and a qualitative undersupply of employment land available, based on the sites assessed. The potential shortfall against a need of between 22 and 26 ha, is at the very least 10.5 ha, and potentially as much as 14.5 ha depending on whether the Council decides to pursue an employment land requirement at the upper or lower end of the recommended range.
- 10.15 To address the shortfall, the Council should identify additional areas of search where new employment sites could be accommodated. Such areas should correspond with areas of identified need and strong market demand.
- 10.16 The Council did not request that Lichfields assess any potential sites which are not currently allocated, do not benefit from extant planning permission for employment development, or are not part of a committed employment site. Nevertheless, during our site visits we identified a few opportunities to extend existing employment areas that could be explored by the Council as part of its future site appraisal process.

10.17 Sites which could be explored further include the following extensions to existing employment areas:

- Greenfield sites north of the A59 and the Samlesbury Enterprise Zone;
- Expansion Land to the south and east of Mitton Road Business Park (to include Phase 3 development and beyond; and,
- Fort Vale Engineering, Calder Vale Park – rationalisation of the site and extension to the north and west.

10.18 These sources of sites amount to an estimated potential gross area of **78 ha**, although the net developable area, particularly north of the A59 and the Samlesbury EZ, will undoubtedly be very much lower than this figure. This would nevertheless be in addition to the identified supply of 11.51 ha net existing and allocated employment space. We have not appraised these sites in detail but suggest that they could be considered alongside other sites put forward as part of a comprehensive call for sites exercise by the Council.

10.19 It will be important in considering the potential to identify additional allocations to ensure that the supply of sites is, wherever possible, clustered together or focussed on a smaller number of larger parcels of land – rather than dispersed across a wide portfolio of sites. Such an approach can help to provide an appropriate concentration of employment uses that can contribute towards securing the necessary investment, business infrastructure and occupier interest.

### **Policy Implications**

10.20 To meet the future requirements for office and industrial floorspace in Ribble Valley, it will be necessary for the Council to make choices about which sites to allocate for employment development or which to bring forward as mixed-use schemes either in part or whole. These judgements need to consider:

- the local benefits of employment sectors and the need to sustain a diversified and resilient economy that is able to capitalise on economic growth opportunities as they arise, particularly in the vicinity of the Samlesbury Aerospace EZ;
- the economic and market outcomes that would arise if particular sectors such as advanced manufacturing become displaced from the economy, or are otherwise constrained from expanding in the Ribble Valley;
- the need to promote growth in high value employment roles / jobs that require a skilled manufacturing worked force in Ribble Valley and that meet the aspirations of resident workers.

10.21 In order to ensure a flexible and responsive policy framework for the Borough, it will be necessary to not just concentrate on meeting the forecast quantitative requirements for office and industrial space in Ribble Valley, which will fluctuate over time, but to reflect on the opportunities and risks that flow from particular policy approaches. This could include how the delivery of employment land can be prioritised in particular areas and for particular uses, or how scope can be created to deliver inward investment opportunities for Ribble Valley following on from the once in a generation investment at the Aerospace EZ.

10.22 In this context, a number of options emerge:

#### **1. Allocate new industrial sites**

10.23 The option of allocating additional sites for industrial development would increase the very limited choice of existing sites and provide the Ribble Valley with new development opportunities of the size and scale necessary to allow local businesses to expand. This is



particularly important as a significant amount of demand for premises and development in the Ribble Valley is driven by local businesses alongside the supply chain to support the aerospace advanced manufacturing cluster. This option should be set out in more detail in a new Policy of the emerging Local Plan, setting out precise locations and sites to allocate.

- 10.24 Within the current uncertain economic climate as we hopefully move out of the pandemic, focus should be placed upon sites in areas of strongest market demand. Whilst there are robust levels of demand for industrial premises across the Ribble Valley, larger units along the A59 such as those recently developed at Twin Brooks business park and smaller units suitable for smaller manufacturing/trade counter uses such as those at Mitton Road Business Park receive the greatest level of interest.
- 10.25 Lichfields therefore considers that the focus should be on providing further industrial allocations despite the relatively weak levels of job growth forecast in the light industrial and B2 general industrial sectors.
- 10.26 In contrast, although the econometric projections suggest a potential growth in office jobs over the plan period in the Ribble Valley, there are concerns regarding the amount of office space that is required. Setting the National Cyber Force [NCF] headquarters to one side, the office market is generally limited and further substantial office allocations could serve to further weaken the attractiveness of secondary office space in the Ribble Valley. Furthermore, the current stock of office space in the Ribble Valley is biased towards refurbished Victorian buildings rather than purpose-built accommodation. Nearly all office enquiries are from local businesses and there is considered to be insufficient demand for significant new build premises in the short term.

## **2. Intensification of existing sites**

- 10.27 The upgrading and refurbishment of existing industrial areas (and where possible, redevelopment so that they can be used more efficiently) provides a further option for accommodating future requirements. Better utilisation of the existing industrial stock could be achieved through gradual redevelopment of individual plots, for example replacing a large older unit with a development of modern smaller units for which there is stronger demand.
- 10.28 There may be limited scope to upgrade and renew some of the weaker sites, or, for example, to develop sites currently under-utilised as open storage to ensure that this space remains attractive and viable to the market. In the first instance this approach could focus on older employment sites that do not currently reflect modern working layouts, densities, technology and premises and perform relatively poorly based on recent site assessments. This may comprise redevelopment, although qualitative improvements can also be delivered through refurbishment of existing buildings (to an extent).

## **3. Policy Delivery Mechanisms**

- 10.29 Alongside provision of new supply as noted above, upgrading and renewal of the Ribble Valley's existing stock of office accommodation will also be important. It will not only ensure that this space remains attractive to the market, but may also provide the opportunity to create some additional supply. This may comprise redevelopment, but qualitative improvements can also be delivered through refurbishment of existing Victorian buildings.
- 10.30 Barriers to the redevelopment of industrial premises in the Ribble Valley include marginal viability on sites that are not located in prime locations near to the Enterprise Zone. Better utilisation of the stock on such sites could be achieved either through gradual redevelopment of individual plots (e.g. replacing a large older unit with development of modern small units,

particularly move on workspace for which there is good demand), or the sub-division of larger units.

- 10.31 Based on experience elsewhere, qualitative improvements on the larger estates could also include the stripping and repainting of older industrial units, and making environmental, security and traffic management improvements through a Business Improvement District [BID] mechanism. Similar processes of gradual upgrading could be encouraged in larger industrial areas to ensure they can make a positive contribution to meeting some of Ribble Valley's future growth requirements.
- 10.32 There may also be some potential to explore different funding sources to enable SMEs to upgrade premises or develop new premises if the market does not deliver these improvements. This could be through either gap funding assistance or de-risking improvements through up-front finance. This could include a number of forms of direct Council or Lancashire EP financial support, such as a Business Improvement Grant, and direct lending to small firms and/or mortgage support. Such measures may be harder to fund in the current economic climate but could be worthwhile future actions.
- 10.33 The Council may wish to explore the potential for using Community Infrastructure Levy [CIL] to deliver infrastructure, such as highways and communications infrastructure, to support the delivery of employment sites. This would be subject to such provision according with the legislation and regulations governing CIL.
- 10.34 Where the development lies within an area of low industrial and office demand, subject to the legal provisions governing such approaches, funding from sources such as CIL could be pooled<sup>43</sup> and used to develop workspace space on other sites, perhaps including those in Council ownership, and loans or grants to firms to support upgrading of premises. This could also potentially be used to fund further enterprise or incubation workspace.
- 10.35 It may be appropriate to explore opportunities to de-risk planning issues for certain types of development, in a way that is appropriate to the site context. This could include, for example, Local Development Orders [LDOs], design codes, or other forms of planning brief to provide greater certainty on the types of development that will be supported by the Council.
- 10.36 Mixed use schemes can also be a way forward in delivering some new office or industrial space. This has been effective on schemes such as the Hindle and Schofield Site, Barrow Brook Business Park in Barrow. However, the market alone is unlikely to deliver these improvements. Encouragement for owners and developers may be necessary, and could be aided by a range of planning and economic development interventions including:
- 1 A Local Plan policy encouraging such forms of upgrading, although this will only work in combination with other actions;
  - 2 Continued and stronger Local Plan policy protection for certain industrial sites (reducing the potential for residential 'hope value' pricing out development);
  - 3 Local initiatives to publicise to local firms' case studies of successful upgrading of business premises, including costs, local contractors involved and rental or other benefits achieved;
  - 4 Encouragement of mixed use developments to help facilitate and cross-subsidise the creation of office/industrial premises; and,
  - 5 economic development officers engaging with owners on upgrading of premises.

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<sup>43</sup> Subject to compliance with the relevant CIL Regulations

## **Constructing a Delivery Trajectory for Employment Sites**

- 10.37 In light of the scale of employment land that may become available for use over the study period and the resulting surplus of employment land likely to arise, there is a need for the Ribble Valley to identify a realistic delivery trajectory for these employment sites and to understand which offer the best prospects of accommodating commercial / industrial development over the period to 2038.
- 10.38 It is recommended that the Council evidence how its portfolio of allocations and other development opportunities will support delivery of new space over the short, medium and long-term (structured broadly in five-year periods). This accords with the approach set out in the former SEEPB Guidance<sup>44</sup> on employment land assessments which encouraged local authorities to demonstrate a five-year rolling supply of employment land and generally aligns with how Government requires housing land to be measured and provided.
- 10.39 Given the relatively large gap between demand and supply, the Council should consider options for how this can be addressed (preferably in the form of new allocations). It is helpful for sites to be assessed on a consistent basis in order to determine at broadly what point in the Plan period they may become available, and how important any individual site is for meeting either office or industrial needs within any rolling five-year period. It will also be important in establishing any potential mismatch between identified allocations and those areas of the Ribble Valley that attract the strongest levels of market demand, or have very little availability at present such as Clitheroe.
- 10.40 In determining the likely timing and availability of land that could meet 5 yearly requirements, any delivery trajectory should have regard to:
- 1 the planning status of sites (extant planning permission, allocation etc.);
  - 2 development constraints/costs and known requirements for infrastructure (more detailed assessment work may be required);
  - 3 current developer/landowner aspirations; and,
  - 4 market delivery and viability factors.
- 10.41 The assessment would provide the opportunity to identify and map out the Local Plan's 'when', 'whom' and 'how' employment space delivery actions for each site. In turn, it will also offer a basis to continually assess the potential role of a site in meeting employment land and other Local Plan objectives (and, inter alia, the policy benefits that would accrue if earlier delivery of the site was encouraged). The trajectory should be linked to the annual monitoring process and periodically updated to ensure the rolling supply of employment land during the new Local Plan period.

## **Monitoring**

- 10.42 Reflecting the Practice Guidance, it will be important to monitor future changes in the demand and supply of employment space to identify changing patterns and inform any policy responses required. The Council currently monitors planning permissions granted for employment uses in the Ribble Valley on an on-going basis, as well as losses to alternative uses in its Annual Monitoring Reports by Use Class, which is to be commended.
- 10.43 In addition to this, specific items which it could be useful to monitor are identified below and could be incorporated into a re-booted Monitoring Framework for the emerging Local Plan:

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<sup>44</sup> SEEPB Economic and Employment Land Assessments Supplementary Guidance Consultation Document, 2009. Although the SEEPB no longer exists and the formal status of this guidance is not established, it is considered to be a source of good practice.

- 1 Levels of future demand for office/industrial space and which of the study's estimates of future requirements this best relates to;
- 2 How much of the currently identified supply of employment space commitments are likely to come forward and whether any new sites emerge;
- 3 The extent to which the new PD regime is resulting in a loss of formerly employment sites to alternative uses, and whether the new E Use Class is having an adverse effect in this regard; and,
- 4 Any on-going deficiencies in provision for specific types of employment premises (e.g. small, low cost, business or industrial units).

# **Appendix 1 Site Assessment Pro-Formas**

**Site Name: Hindle and Schofield Site, Barrow Brook Business Park, Barrow  
(Ref: 6)**



**GROSS SITE AREA:  
1.19 ha**

**ESTIMATED NET DEVELOPABLE AREA:  
0.08 ha**

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>The site is located within the existing Barrow Brook business park development, adjacent to the A59. The business park includes a number of trade retail/food and manufacturing units.</p>	
<p><b>Local Plan Designation</b></p>	<p>Having regards to the Local Plan Proposals Map, the site lies within then settlement boundary of Barrow. Barrow is identified in the adopted Core Strategy as a Tier 1 Village. The site comprises part of Barrow Enterprise Site (Policy DS1) and is a Committed Employment Site (Policy DMB1).</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>3/2016/1168 Proposed nursery building. Approved with conditions February 2017.</p> <p>3/2018/0274 Erection of 1,380 sqm, two-storey retail unit for the sale of large furniture items, associated interior fixtures and fittings and ancillary tearoom. Approved with conditions August 2018</p> <p>3/2019/0304 Proposed new office development. Approved with conditions May 2019.</p> <p>3/2021/0397 Proposed new light industrial units/retail trade counter. Approved with conditions February 2021.</p>	
<p><b>Current Use and Land Type</b></p>	<p>The site has been developed out primarily for small units currently housing a range of Sui Generis and trade counter uses. There is a small area of undeveloped land which currently has approval for office and industrial/trade counter uses (3/2019/0304 and 3/2021/0397).</p>	
<p><b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)</p>	<p>The site includes 9 units with mixed retail, trade counter and manufacturing use as well as a creche. These units are all currently occupied. The wider business park includes further retail, manufacturing and food outlets.</p>	

Current occupiers are shown in the image below. The vacant unit listed on the sign is now occupied by Ribble Cycles.



**Strategic Road Access**

The site is accessible via two roundabouts and an approx. 200m link road from the A59 (Holm Road). The A59 connects with the M6 at junction 31 approx. 18km from the site.

GOOD

**Local Road Access**

Local road access is provided via the A59.

VERY GOOD

**Proximity to Urban Areas and Access to Labour and Services** (including public transport / cycling / walking accessibility)

The residential area of Barrow lies approx. 100m west of site boundary to the south of the wider business park. The park features a dedicated bus stop. Clitheroe is approx. 3.5km to the north and Whalley approx. 2.5km to the south. The existing business park offers a range of food options as well as a creche, petrol filling station and convenience store.

GOOD

**Compatibility of Adjoining Uses** (including amenity impacts experienced by current/future occupiers and neighbouring areas)

The site is located adjacent to existing employment uses with residential areas to the immediate south and west. Given the uses present on site there is no conflict with the nearby residential areas.

GOOD

**Developmental and Environmental Constraints** (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)

Site is almost fully developed; however, the small parcel of undeveloped land could accommodate an additional unit.

VERY GOOD

<b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)	Site is almost fully developed; however, the small parcel of undeveloped land is large enough for an additional unit.	VERY GOOD
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	Site is almost fully developed and has full occupancy. The remaining parcel of land has extant planning permission for employment uses and will likely come forward as no constraints are identified.	VERY GOOD
<b>OVERALL SITE RATING</b>	<b>VERY GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	<p><b>Sui generis/Trade counter/retail</b></p> <p><b>Retain and protect for employment use in accordance with Policy DMB1.</b></p>	
<b>SITE SUMMARY:</b>		
<p>This site forms part of the wider Barrow Brook Business Park and is currently occupied by a number of E(g)/B2/B8 uses in small units as well as a creche. The site is almost fully developed with only a small parcel of undeveloped land large enough for a single additional unit (which has extant planning permission for new light industrial units/retail trade counter). The site sits within an established employment area, is amongst compatible uses and is meeting local needs. Therefore, the should be retained and protected as employment land.</p>		





**GROSS SITE AREA:**  
0.38 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
0.00 ha

CRITERIA	COMMENT	RATING
<b>Site Context</b> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	The site falls within the wider Salthill Industrial Estate, which contains a range of E(g), B2 and B8 uses. The site is located to the eastern boundary of the industrial estate adjacent to the A671.	
<b>Local Plan Designation</b>	The Adopted Core Strategy identifies the site as falling within the provisions of Policy DMB1 as an existing employment site along with the wider Salthill Industrial Estate.	
<b>Status in SHLAA</b>	N/A	
<b>Planning History</b>	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)	
<b>Current Use and Land Type</b>	Site is fully built out.	
<b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)	The site is wholly occupied by food manufacturer Dugdale Nutrition and includes a storage/distribution warehouse and associated office. There is also an associated production facility and further storage unit outside of the site boundary. There is no further room for development on the site.	
<b>Strategic Road Access</b>	Strategic road access from the site is provided via the A671 east of the industrial estate which connects with the A59 to the south at approx. a 1km drive from the site.	<b>VERY GOOD</b>
<b>Local Road Access</b>	Local road access is provided via the A671, A59 or directly into Clitheroe centre.	<b>VERY GOOD</b>
<b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)	The site is located approx. 2km to the east of the centre of the Clitheroe urban area, which has a train station and a wider range of amenities. Public transport access is via Clitheroe train station or bus	<b>GOOD</b>

	stops along the A671 approx. 1km from the site. The site is walkable/cyclable for residents of Clitheroe.	
<b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)	The wider Salthill industrial estate houses a large number of E(g)/B2/B8 uses. The site sits fairly isolated on the edge of the industrial park. There is a residential area approx. 700m north west of the site. In this regard the site is suitable for E(g)/B2/B8 use.	<b>VERY GOOD</b>
<b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)	The site is fully built-out. There is very limited further land available for expansion due to levels differences. The land to the west of the production facility is crossed by a Public Right of Way.	<b>VERY GOOD</b>
<b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)	The site is fully built out.	<b>VERY GOOD</b>
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	The site is fully built out.	<b>VERY GOOD</b>
<b>OVERALL SITE RATING</b>	<b>VERY GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	Industrial/Distribution/Office <b>Retain and protect for employment use in accordance with Policy DMB1. It is recommended that the site boundary be redrawn to encompass the whole Dugdale Nutrition site.</b>	
<b>SITE SUMMARY:</b>		
This site is on the edge of the existing Salthill Industrial Estate and is wholly occupied by a food manufacturer. The occupier has already expanded the site beyond the current site boundary leaving no room for further expansion due to levels differences. The occupier is well established, the site sits within an established employment area amongst compatible uses and is meeting local needs. Therefore, the site should retain its protection as employment land.		

**Site Name: Land at Time Technology Park  
(Ref: )**



**GROSS SITE AREA:**  
ha 1.14

**ESTIMATED NET DEVELOPABLE AREA:**  
ha 0.15

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>This site lies adjacent to the eastern boundary of the existing Time Technology Park and immediately beside the DWP Pensions Centre car park. The site provides 18 modern office/B8 units smaller than those offered at other sites nearby.</p>	
<p><b>Local Plan Designation</b></p>	<p>The Housing and Economic Development Plan Document identifies the site as falling within the provisions of Policy DMB1. The site is included in the DPD as an allocated employment site EAL2 in relation to Key Statement EC1 of the adopted Core Strategy. Since adoption of the DPD this site has almost been fully built out and is currently close to full capacity.</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>3/2017/0284 - Proposed Business Park comprising 18 industrial units for B8 (storage and distribution) and B1 (offices and light industry) uses (resubmission of application 3/2015/0906).</p> <p>3/2020/0990 - Proposed construction of four business units on land adjacent to existing business units (ref 3/2017/0284).</p>	
<p><b>Current Use and Land Type</b></p>	<p>The site currently contains 18 small industrial/office units offering c.3,550 sqm with associated access and parking. The site also contains an overflow car park for the DWP Pensions Centre, although planning has been granted for an additional 4 units to replace this car park.</p>	
<p><b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)</p>	<p>The existing units on site are occupied by a range of retail, storage, industrial and office uses. A site visit revealed a total of 13 current occupiers – some of which occupy more than one unit. 2 units were vacant offering approx. 300sqm.</p>	



<p><b>Strategic Road Access</b></p>	<p>The site is accessible directly from the A678. The A678 provides access to the M65 at Junction 7 to the south west and Junction 8 approx. 2km to the south of the site via the A6068.</p> <p>Simonstone Lane also connects with the A671 approx. 1km to the north.</p>	<p>GOOD</p>
<p><b>Local Road Access</b></p>	<p>Local road access is provided by Simonstone Lane and the A678.</p>	<p>VERY GOOD</p>
<p><b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)</p>	<p>The site is approx. 1.5km from the urban areas of Simonstone to the North and Padiham approx. 1.8km to the east. Both are walkable via footpaths. There are no dedicated cycle lanes.</p> <p>Local transport access is provided by bus stops on the A678 which service Calder Vale and Time Technology business parks approx. 150m from the site entrance.</p>	<p>AVERAGE</p>
<p><b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)</p>	<p>The site is adjacent to Time Technology Park which contains a range of B2 uses, as well as the DWP Pensions Centre to the east. The site is also less than 1km from other business parks at Altham and Shuttleworth. There are no residential areas in the vicinity of the site. The site is therefore compatible with a range of smaller-scale E(g), B2 and B8 uses.</p>	<p>VERY GOOD</p>
<p><b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)</p>	<p>The site is almost fully built out with approval for a final 4 units.</p>	<p>VERY GOOD</p>
<p><b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)</p>	<p>Site is almost complete – planning permission has been granted for an additional 4 units on the overflow carpark which will bring the site to 100% completion with no further room for development.</p>	<p>VERY GOOD</p>
<p><b>Market Attractiveness</b> (including appropriateness, vacancy and market</p>		<p>VERY GOOD</p>

activity on site for the type of development proposed)	The site is a newly established business park within a wider employment area. The existing vacant units and 4 units with planning permission are likely to be attractive to businesses with a need for smaller E(g), B2 and B8 units.	
<b>OVERALL SITE RATING</b>	<b>VERY GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	<p>Site is close to full completion. Suitable for smaller scale E(g), B2 and B8 use.</p> <p><b>Retain and protect for employment use in accordance with Policy DMB1 and EAL2.</b></p>	

**SITE SUMMARY:**

This site is adjacent to Time Technology Park which contains a range of B2 uses, as well as the DWP Pensions Centre to the east. The site currently contains 18 small industrial/office units offering c.3,550 sqm with associated access and parking. The site also currently contains an overflow car park for the DWP Pensions Centre, although planning has been granted for an additional 4 business units to replace this car park adding c.700 sqm of floorspace.

The site sits within an established employment area amongst compatible uses, is close to being fully occupied and is meeting local needs. Planning permission has been granted to add an additional 4 units to the site. Therefore, this should be protected as employment land under Policy DMB1 and the remaining developable land under Policy EAL2.

Site Name: Land at Hey Road, Barrow



**GROSS SITE AREA:**  
5.95 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
5.06 ha

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>The site is located behind the existing Barrow Brook business park development, adjacent to the A59. The business park includes a number of retail/food and manufacturing units. The site is currently farmland.</p>	
<p><b>Local Plan Designation</b></p>	<p>Having regards to the Local Plan Proposals Map, the site lies within the settlement boundary of Barrow. Barrow is identified in the adopted Core Strategy as a Tier 1 Village. The site comprises part of Barrow Enterprise Site (Policy DS1) and is a Committed Employment Site (Policy DMB1). Paragraph 4.14 of the Core Strategy states that: <i>“The existing site at Barrow Enterprise Park would continue in its role as the borough’s principle strategic location for employment.”</i></p> <p>The site is further identified as principle location for employment development under Key Statement EC1 in the adopted Core Strategy.</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>The following applications apply to the southern half of the site:</p> <p>2012/0739 – Outline planning permission for 12,975 sqm of B1/B2/B8 office/industrial floorspace</p> <p>3/2021/0759 - Outline application for the development of land north of Ribble Valley Enterprise Park to provide up to 9,913 sqm of new commercial/employment floorspace (Use Class E).</p>	

	Requesting consideration of access with all other matters reserved.	
<b>Current Use and Land Type</b>	The land is currently in partial use as farmland and has been designated for employment land purposes.	
<b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)	The site is not currently occupied.	
<b>Strategic Road Access</b>	<p>The Council has confirmed that the site has a ransom strip in third party ownership to provide access from the trade park, which itself is accessible from the A59. Direct access to the site from the east via the A59 is a possibility and a slip road is included in the proposed layout under application 3/2021/0759. Due to this slip road being on the A59 northbound, any drivers leaving the site wishing to head southwards will be required to drive north to the nearest roundabout, which would extend journeys by approx. 1.3km.</p> <p>If access via the existing business park is provided, the A59 can be access via 2 roundabouts and a 200m link road (Holm Road).</p> <p>The A59 connects with the M6 at junction 31 approx. 18km from the site.</p>	AVERAGE
<b>Local Road Access</b>	Local road access is provided via the A59.	GOOD
<b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)	Residential area approx. 100m west of site boundary as well as south of wider trade park. The trade park features a dedicated bus stop. Clitheroe is approx. 3.5km to the north and Whalley approx. 2.5 km to the south. The existing business park offers a range of food and drink options as well as a creche, petrol filling station and convenience store.	VERY GOOD
<b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)	The site is located adjacent to existing employment uses with residential areas to the immediate south and west. There is a school approx. 75m from the west boundary. The site is adjacent to a parcel of land to the south west with consent for residential development. The site is therefore compatible with a range of E(g)/B2/B8 uses dependent on proximity to these potentially sensitive receptors.	GOOD
<b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)	<p>The site is relatively flat aside from some drainage trenches, making it suitable for larger employment development. A public footpath crosses the northern edge of the site entering via a stile at the south-east corner and crossing diagonally to leave the site at its western boundary. There are some trees present on the site.</p> <p>The site is located entirely within flood zone 1.</p>	GOOD
<b>Barriers to Delivery and Mitigation</b>	There is a ransom strip between the existing business park and the site which may lead to new access	AVERAGE

(including ownership constraints - if known)	<p>infrastructure being required via the A59. Agents confirmed that the site has not come forward principally due to the issue of access, with no agreement able to be reached to date with the owners of the ransom strip. Slip road access from the A59 was also said to be an issue due to the difficulty in achieving suitable access for HGVs that won't cause issues on the A59, plus the need for HGVs to turn around when heading southwards or coming in from the north.</p> <p>An access slip road is included in the layout under application 3/2021/0759.</p>	
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	The site is large and is situated within a mixed industrial and residential area.	GOOD
<b>OVERALL SITE RATING</b>	<b>GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	<p>Suitable for E use class, particularly light industrial/office</p> <p><b>Recommended to be retained for employment development in accordance with Policy DMB1.</b></p>	
<b>SITE SUMMARY:</b>		
<p>The site comprises of a number of fields within an existing employment area, making it suitable to a range of employment uses. The business park includes a number of retail/food and manufacturing units. The site is currently used as farmland. Difficulties in unlocking the ransom strip have halted the site from coming forward in the past as the only alternative is direct access from the A59 which also presents challenges. The site is however the largest available site included in this assessment and is suitable for a range of E(g)/B2/B8 uses. Therefore, assuming the access issues can be resolved, the site should be retained as a designated site for employment development.</p>		



**Site Name: Land North of Barrow Brook Business Village, Barrow**



**GROSS SITE AREA:**  
3.11 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
2.64 ha

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>The site is located behind the existing Barrow Brook business park development, adjacent to the A59. The business park includes a number of retail/food and manufacturing units. The site is currently farmland.</p>	
<p><b>Local Plan Designation</b></p>	<p>Having regards to the Local Plan Proposals Map the site lies within then settlement boundary of Barrow. Barrow is identified in the adopted Core Strategy as a Tier 1 Village. The site comprises part of Barrow Enterprise Site (Policy DS1) and is a Committed Employment Site (Policy DMB1). Paragraph 4.14 of the Corte Strategy states that: <i>“The existing site at Barrow Enterprise Park would continue in its role as the borough’s principle strategic location for employment.”</i></p> <p>The site is further identified as principle location for employment development under Key Statement EC1 in the adopted Core Strategy.</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>2012/0739 – Outline planning permission for 12,975 sqm of B1/B2/B8 office/industrial floorspace</p> <p>3/2021/0759 - Outline application for the development of land north of Ribble Valley Enterprise Park to provide up to 9,913 sq m of new commercial/employment floorspace (Use Class E). Requesting consideration of access with all other matters reserved.</p>	
<p><b>Current Use and Land Type</b></p>	<p>The land is currently in partial use as farmland and has been designated for employment land purposes.</p>	
<p><b>Occupier Profile</b></p>	<p>The site is not currently occupied.</p>	

(if partly developed, including % of available land and levels of vacancy onsite)		
<b>Strategic Road Access</b>	<p>The Council has confirmed that the site has a ransom strip in third party ownership to provide access from the trade park, which itself is accessible from the A59. Direct access to the site from the east via the A59 is a possibility and a slip road is included in the proposed layout under application 3/2021/0759. Due to this slip road being on the A59 northbound, any drivers leaving the site wishing to head southwards will be required to drive north to the nearest roundabout, which would extend journeys by approx. 1.3km.</p> <p>If access via the existing business park is provided, the A59 can be access via 2 roundabouts and a 200m link road (Holm Road).</p> <p>The A59 connects with the M6 at junction 31 approx. 18km from the site.</p>	AVERAGE
<b>Local Road Access</b>	Local road access is provided via the A59.	GOOD
<b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)	Residential area approx. 100m west of site boundary as well as south of wider trade park. The trade park features a dedicated bus stop. Clitheroe is approx. 3.5km to the north and Whalley approx. 2.5 km to the south. The existing business park offers a range of food and drink options as well as a creche, petrol filling station and convenience store.	VERY GOOD
<b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)	The site is located adjacent to existing employment uses with residential areas to the immediate south and west. There is a school approx. 75m from the west boundary. The site is adjacent to a parcel of land to the south west with consent for residential development. The site is therefore compatible with a range of E(g)/B2/B8 uses dependent on proximity to these potentially sensitive receptors.	GOOD
<b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)	<p>The site is relatively flat aside from some drainage trenches, making it suitable for larger employment development. A public footpath crosses the northern edge of the site entering via a stile at the south-east corner and crossing diagonally to leave the site at its western boundary. There are some trees present on the site.</p> <p>The site is located entirely within flood zone 1.</p>	GOOD
<b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)	There is a ransom strip between the existing business park and the site which may lead to new access infrastructure being required via the A59. Agents confirmed that the site has not come forward principally due to the issue of access, with no agreement able to be reached to date with the owners of the ransom strip. Slip road access from the A59 was also said to be an issue due to the difficulty in	AVERAGE

	<p>achieving suitable access for HGVs that won't cause issues on the A59, plus the need for HGVs to turn around when heading southwards or coming in from the north.</p> <p>An access slip road is included in the layout under application 3/2021/0759.</p>	
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	The site is large and is situated within a mixed industrial and residential area.	GOOD
<b>OVERALL SITE RATING</b>	<b>GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	<p>Suitable for E use class, particularly light industrial/office</p> <p><b>Recommended to be retained for employment development in accordance with Policy DMB1.</b></p>	
<b>SITE SUMMARY:</b>		
<p>The site comprises of a number of fields within an existing employment area, making it suitable to a range of employment uses. The business park includes a number of retail/food and manufacturing units. The site is currently used as farmland. Difficulties in unlocking the ransom strip have halted the site from coming forward in the past as the only alternative is direct access from the A59 which also presents challenges. The site is however the largest available site included in this assessment and is suitable for a range of E(g)/B2/B8 uses. Therefore, assuming the access issues can be resolved, the site should be retained as a designated site for employment development.</p>		

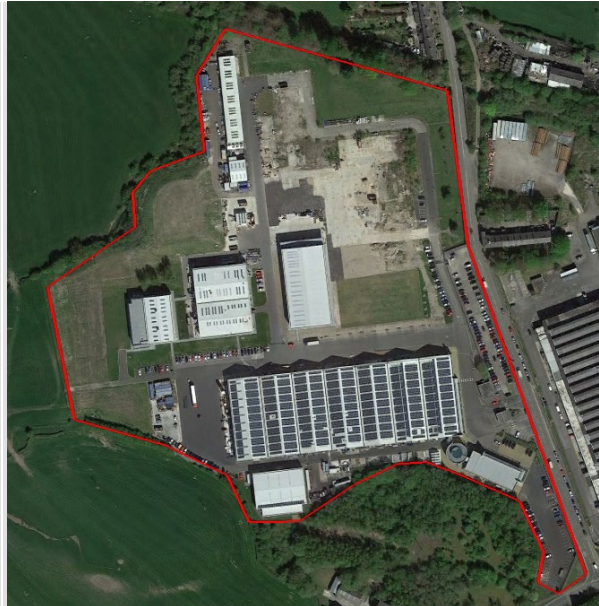


**GROSS SITE AREA:**  
0.87 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
0 ha

CRITERIA	COMMENT	RATING
<b>Site Context</b> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	The site falls within the existing Calder Vale Park employment area, which is occupied by Fort Vale Engineering. The irregular shape of the appraisal site in the context of the existing development likely relates to a planning application that did not come to fruition and should be amended.	
<b>Local Plan Designation</b>	The Housing and Economic Development Plan Document identifies the site as falling within the provisions of Policy DMB1 as an existing employment site.	
<b>Status in SHLAA</b>	N/A	
<b>Planning History</b>	2011/0537 – Full planning permission for 3,412 sqm B2 Investment Casting Foundry.	
<b>Current Use and Land Type</b>	Site is fully built out	
<b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)	Site is occupied in its entirety by Fort Vale Engineering.	
<b>Strategic Road Access</b>	The Calder Vale site is accessible from the A678 approx 100m to the south from the site entrance. The A678 provides access to the M65 at Junction 7 to the south west and Junction 8 via the A6068 to the south.  Simonstone Lane also connects with the A671 approx. 1km to the north.	<b>GOOD</b>
<b>Local Road Access</b>	Unconstrained local road access is provided by Simonstone Lane and the A678.	<b>GOOD</b>
<b>Proximity to Urban Areas and Access to Labour and Services</b>	The site is approx. 1.5km from the urban areas of Simonstone to the North and Padiham approx. 1.8km	<b>GOOD</b>

(including public transport / cycling / walking accessibility)	to the east. Both are accessible via footpaths. There are no dedicated cycle lanes.  Public transport access is provided by bus stops on the A678 approx. 150m from the site entrance which service Calder Vale and Time Technology business parks.	
<b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)	The site falls entirely within the existing Calder Vale Park employment area, which is occupied by Fort Vale Engineering. The site is adjacent to Time Technology Park which contains a range of B2 uses and is less than 1km from other business parks at Altham and Shuttleworth. There are no residential areas in the vicinity of the site. The site is therefore compatible with a range of E(g), B2 and B8 uses.	<b>VERY GOOD</b>
<b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)	The site is fully built-out.	<b>VERY GOOD</b>
<b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)	The site is fully built-out. Site is wholly owned by Port Vale Engineering within a wider site and is retained for their use.	<b>VERY GOOD</b>
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	The site is not available on the open market but serves as expansion land for Fort Vale Engineering's needs.	<b>VERY GOOD</b>
<b>OVERALL SITE RATING</b>	<b>GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	<p><b>Industrial</b></p> <p><b>Retain and protect for employment use in accordance with Policy DMB1</b></p> <p><b>It is recommended that the site boundary be expanded and merged with the nearby 'Rear of Building S' site to encompass the whole Calder Vale Site as suggested below.</b></p>	

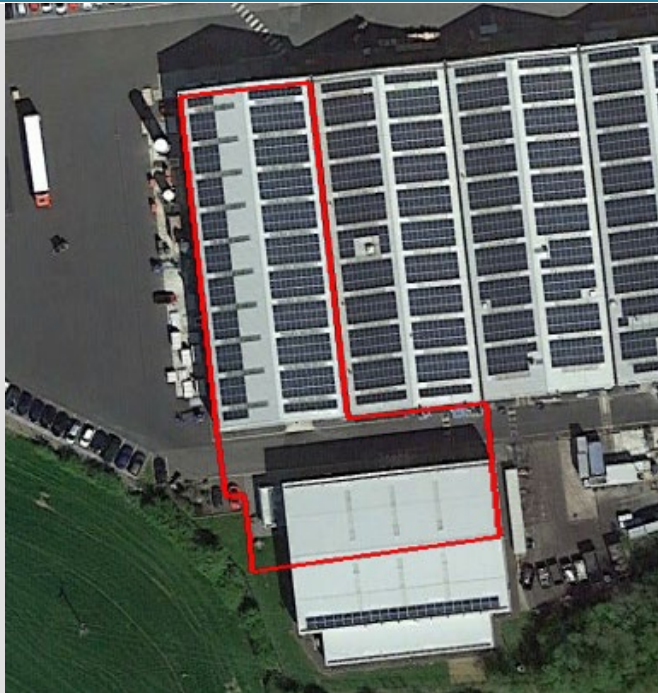


#### **SITE SUMMARY:**

The site falls entirely within the existing Calder Vale Park employment area, which is occupied by Fort Vale Engineering. The site includes part of 2 larger industrial units with no further room for development within the existing site boundary.

The site is fully occupied by an important local employer and is clearly fulfilling local needs and should be retained and protected.

There is an opportunity to rationalise the site boundary and expand to the north and west as set out above, although it is accepted that this may encroach into the surrounding Green Belt and would therefore need careful consideration by the Council as to whether exceptional circumstances can be demonstrated through any Local Plan/Green Belt Review in future.



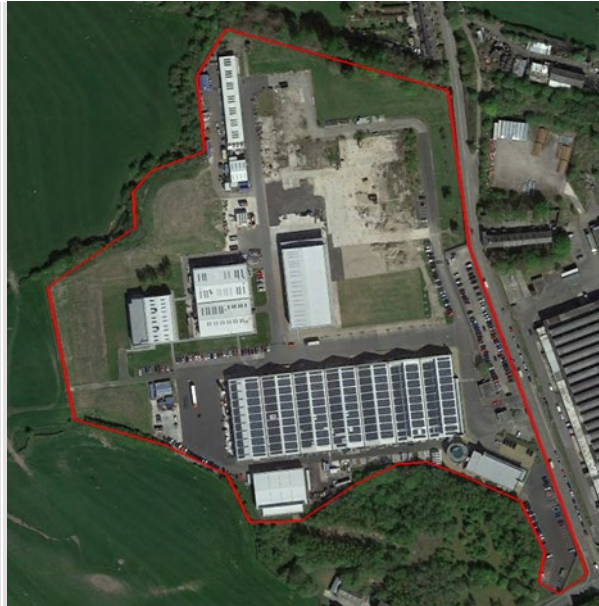
**GROSS SITE AREA:**  
0.50 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
0 ha

CRITERIA	COMMENT	RATING
<b>Site Context</b> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	The site falls within the existing Calder Vale Park employment area, which is occupied by Fort Vale Engineering. The irregular shape of the appraisal site in the context of the existing development likely relates to a planning application that did not come to fruition and should be amended.	
<b>Local Plan Designation</b>	The Housing and Economic Development Plan Document identifies the site as falling within the provisions of Policy DMB1 (Committed/Existing Employment Site).	
<b>Status in SHLAA</b>	N/A	
<b>Planning History</b>	2011/0222 – Full planning permission for a 1,951 sqm B1(c)/ B2 extension to an existing building (Building ‘S’)	
<b>Current Use and Land Type</b>	Site is fully built out	
<b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)	Site is occupied in its entirety by Fort Vale Engineering.	
<b>Strategic Road Access</b>	The Calder Vale site is accessible from the A678 approx 100m to the south from the site entrance. The A678 provides access to the M65 at Junction 7 to the south west and Junction 8 via the A6068 to the south.  Simonstone Lane also connects with the A671 approx. 1km to the north.	<b>GOOD</b>
<b>Local Road Access</b>	Unconstrained local road access is provided by Simonstone Lane and the A678.	<b>GOOD</b>

<p><b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)</p>	<p>The site is approx. 1.5km from the urban areas of Simonstone to the North and Padiham approx. 1.8km to the east. Both are accessible via footpaths. There are no dedicated cycle lanes.</p> <p>Public transport access is provided by bus stops on the A678 approx. 150m from the site entrance which service Calder Vale and Time Technology business parks.</p>	<p><b>GOOD</b></p>
<p><b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)</p>	<p>The site falls entirely within the existing Calder Vale Park employment area, which is occupied entirely by Fort Vale Engineering. The site is adjacent to Time Technology Park and is less than 1km from other business parks at Altham and Shuttleworth.</p>	<p><b>VERY GOOD</b></p>
<p><b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)</p>	<p>The site is fully built out. Site is wholly owned by Port Vale Engineering within a wider site and is retained for their use.</p>	<p><b>VERY GOOD</b></p>
<p><b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)</p>	<p>The site is fully built out. Site is wholly owned by Port Vale Engineering within a wider site and is retained for their use.</p>	<p><b>VERY GOOD</b></p>
<p><b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)</p>	<p>The site is not available on the open market but serves as expansion land for Fort Vale Engineering's needs.</p>	<p><b>VERY GOOD</b></p>
<p><b>OVERALL SITE RATING</b></p>	<p><b>GOOD</b></p>	
<p><b>Recommendation and Potential Future Uses</b></p>	<p><b>Industrial</b></p> <p><b>Retain and protect for employment use in accordance with Policy DMB1</b></p> <p><b>It is recommended that the site boundary be expanded and merged with the nearby 'Casting Foundry Site' to encompass the whole Calder Vale area as suggested below.</b></p>	





#### **SITE SUMMARY:**

The site falls entirely within the existing Calder Vale Park employment area, which is occupied by Fort Vale Engineering. The site includes part of 2 larger industrial units with no further room for development within the existing site boundary.

The site is fully occupied by an important local employer and is clearly fulfilling local needs and should be retained and protected.

There is an opportunity to rationalise the site boundary and expand to the north and west as set out above, although it is accepted that this may encroach into the surrounding Green Belt and would therefore need careful consideration by the Council as to whether exceptional circumstances can be demonstrated through any Local Plan/Green Belt Review in future.

Site Name: Land at Salthill Industrial Estate, Lincoln Way, Clitheroe



**GROSS SITE AREA:**  
0.46 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
0 ha

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>The site is located within the wider Salthill Industrial Estate, which contains a range of E(g), B2 and B8 uses.</p>	
<p><b>Local Plan Designation</b></p>	<p>The Adopted Core Strategy identifies the site as falling within the provisions of Policy DMB1 as an existing employment site along with the wider Salthill Industrial Estate.</p> <p>Key Statement EC1 of the adopted Core Strategy identifies Clitheroe as a preferred location for employment growth.</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>2010/0010 – Outline planning permission for 1,508 sqm of B1(c)/B8 industrial/trade floorspace</p> <p>2011/1075 – Full planning permission for a further 294 sqm of B8 trade floorspace.</p>	
<p><b>Current Use and Land Type</b></p>	<p>Site is fully built out and features a Haulage company and storage/service yard. Part of the site comprises an available retail unit.</p>	
<p><b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)</p>	<p>The site contains 2 units, one of which is vacant. The occupied unit houses a haulage company with a large service/storage yard ensuring there is no further room for development.</p> <p>The vacant unit is modern and is being marketed for trade counter/office/showroom use and comprises c. 420 sqm. It has a roller door to the rear and shares access and service area with the existing occupiers.</p>	
<p><b>Strategic Road Access</b></p>	<p>Strategic road access from the site is provided via the A671 east of the industrial estate which connects with the A59 to the south at approx. a 1.5km drive from the site.</p>	<p><b>GOOD</b></p>

<b>Local Road Access</b>	Local road access is provided via the A671, A59 or directly into Clitheroe centre.	<b>VERY GOOD</b>
<b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)	The site is located approx. 1km to the south east of the centre of the Clitheroe urban area, which has a train station and a wider range of amenities. Public transport access is via Clitheroe train station or bus stops along the A671 approx. 1km from the site. The site is highly accessible either on foot or bike to residents of Clitheroe.	<b>VERY GOOD</b>
<b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)	The wider Salthill industrial estate houses a large number of E(g)/B2/B8 uses. The site is directly adjacent to a slate roofing company and a trailer hire company. There is a residential area approx. 100m from the site, separated by a public park. In this regard the site is suitable for continued E(g)/B2/B8 use.	<b>VERY GOOD</b>
<b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)	The site is fully built out.	<b>VERY GOOD</b>
<b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)	The site is fully built out and no barriers to delivery were observed.	<b>VERY GOOD</b>
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	<p>The vacant unit is modern and currently being marketed for trade counter/office/showroom use. It comprises c. 420 sqm of floorspace. It has a roller door to the rear and shares access and service area with the existing occupiers, which may limit availability of dedicated parking.</p> <p>Agents confirmed that whilst there are 2/3 enquiries about the vacant unit a week, the unit has been on the market for around 6 months and has a quite specific layout inside that somewhat limits its flexibility. However, the unit remains a modern and attractive unit in a desirable location and enquiries continue to be reasonable.</p>	<b>GOOD</b>
<b>OVERALL SITE RATING</b>	<b>GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	<p>Industrial/Trade Counter</p> <p><b>Retain and protect for employment use in accordance with Policy DMB1.</b></p>	

**SITE SUMMARY:**

This is a fully built-out site in a large and established industrial estate which comprises 2 units. There is a single vacant modern unit on site being marketed for trade counter/office/showroom use which shares access and service yard with existing haulage company. The site sits within an established employment area amongst compatible uses and is meeting local needs. Therefore, the site should be protected as employment land going forward.

Site Name: Higher College Farm, Lower Road, Hothersall, Longridge



**GROSS SITE AREA:**  
1.55 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
1.55 ha

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>This is a relatively isolated agricultural site to the south east of the Longridge urban area. The site's northern boundary lies adjacent to the B6243. The northern part of the site comprises a greenfield whilst the southern part of the site contains an existing farm building.</p>	
<p><b>Local Plan Designation</b></p>	<p>Core Strategy Key Statement EC1 (Business and Employment Development) – states that '<i>employment development will be directed towards the main settlement of Clitheroe, Whalley and Longridge as the preferred locations to accommodate employment growth</i>'.</p> <p>The site is identified in the HED DPD as an employment land allocation under Policy EAL3.</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>An application for outline planning permission for 2,592 sqm of B1, B2 and B8 floorspace in 8 units, plus the conversion of the existing farmhouse to the south of the site for 476 sqm of office accommodation, was approved in December 2017 with conditions.</p> <p>A subsequent application for outline planning permission for 21 dwellings and associated works was refused in June 2019. The appeal was also dismissed by an Inspector on 21<sup>st</sup> December 2020. The Inspector concluded that:</p> <p><i>"16. Given the range of uses that can be accommodated on the allocated employment site, which is supported by the extant outline permission, the information submitted by the appellant is</i></p>	

	<p><i>not sufficient to demonstrate that the appeal site is not viable for employment purposes. The proposal therefore fails to accord with Policy DMB1 of the CS.</i></p> <p><i>17. Consequently, I find that the proposal would have a harmful effect on employment in the area. The proposal would be contrary to Policy DMB1 of the CS, Policy EAL3 of the HEDDPD and the Framework which seeks to support business growth and the local economy, and provide a choice of sites and locations to accommodate economic growth.”</i></p> <p>1. 3/2008/0268 Higher College Farm rebuilding existing outbuildings to form an extension to the existing dwelling approved 19/05/2008.</p> <p>2. 3/2006/0195 Higher College Farm closure of existing access and provision of new access off existing access of Lower Road approved 21/04/2006.</p> <p>3. 3/2017/0602 Application for Outline planning permission for industrial units (use classes B1, B2, B8) and associated access, parking, landscaping and services infrastructure with all matters reserved except access. Change of use of farmhouse to office (B1). APPROVED WITH CONDITIONS</p> <p>4. 3/2018/1105 Application for Outline planning permission for 21 dwellings and associated works. REFUSED – APPEAL DISMISSED</p>	
<b>Current Use and Land Type</b>	<p>The southern part of the site includes a converted residential farm building associated with a wholesale/catering butchers’ firm that occupies a small industrial unit just outside the south western corner of the site boundary. There is also a cold food distribution company in a unit just beyond the south east corner of the site boundary. The undeveloped part of the site consists of a single grassy field surrounded by hedges. Access to existing units is via a driveway along the eastern boundary of the site leading to the southern part of the site. Access to the farmhouse appears to be from a single track drive along the western boundary of the site. The site is currently being marketed for sale as a site with planning permission for employment development (B1/B2/B8).</p>	
<b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)	<p>The southern part of the site includes a converted farm building and gardens associated with a wholesale/catering butchers (Brendan Anderton Butchers) that occupies a small industrial unit just outside the south western corner of the site boundary. The remainder of the site is vacant.</p>	
<b>Strategic Road Access</b>	<p>The nearest strategic roads to the site are the A59 approx. 6km south of the site and the M55/M6 approx. 8.5km west of the site.</p> <p>Access to the A59 would be via B6245 which is a country road with single lane bridges.</p> <p>Access to the M6 would be via the B5269 through Longridge urban/residential area to Broughton, joining the M55 at junction 1.</p>	<p>VERY POOR</p>
<b>Local Road Access</b>	<p>Local Road access is via the B5269 which goes through the centre of Longridge going west, the B5269 going south east or the B6243 going east.</p>	<p>AVERAGE</p>

<p><b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)</p>	<p>The site is less than 1km from the centre of the Longridge urban area which contains a range of amenities as well as large residential areas. There is a bus stop on the B6243 directly opposite the northern boundary of the site. This road also has footpaths leading into Longridge.</p>	<p>GOOD</p>
<p><b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)</p>	<p>The site is bound by the farmhouse and industrial units to the south, the B6243 to the north and farmland to the east and west. The nearest residential area is on the other side of the B6243 approx. 50m from the northern site boundary. The site is suitable for smaller scale E(g)/B2/B8 use.</p>	<p>GOOD</p>
<p><b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)</p>	<p>The site requires new access from the B6243 as contained in the outline approval for B1/B2/B8 use. The site also has a very slight incline running northwards.</p>	<p>GOOD</p>
<p><b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)</p>	<p>Whilst unconfirmed, ownership of the site may lie with existing occupiers Brendan Anderton Butchers. The site is currently being marketed for sale as a site with planning permission for B1/B2/B8 employment uses.</p>	<p>GOOD</p>
<p><b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)</p>	<p>Despite the very poor strategic road access, the site may prove attractive for development of smaller industrial units given its proximity to Longridge. The site is currently listed for sale on a freehold basis on the Eckersley Property website, albeit relating to the slightly smaller 1.06 ha area of greenfield land to the north of the farmhouse. It is listed as being 'under offer' on the website.</p>	<p>GOOD</p>
<p><b>OVERALL SITE RATING</b></p>	<p><b>GOOD</b></p>	
<p><b>Recommendation and Potential Future Uses</b></p>	<p>Industrial/Office <b>Retain as an employment land allocation under Policy EAL3.</b></p>	

**SITE SUMMARY:**

This is an isolated farmland site immediately to the south east of Longbridge. The southern part of the site includes a converted farmhouse associated with a wholesale/catering butchers' firm that occupies a small industrial unit just outside the south western corner of the site boundary. The site had outline planning permission for conversion of the farmhouse to B1 and the construction of up to c3,000 sqm of B2/B8 floorspace across a number of small units. The permission included the construction of a new access from the B6243. The site is currently listed as being under offer on an agent's website.

Given that the site is one of just three employment land allocations within the HED DPD and is the only allocation which is largely undeveloped, it is recommended that the site be retained for potential employment development.

Site Name: Mitton Road, Land Adj former Genus Site, Whalley



**GROSS SITE AREA:**  
1.85 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
0 ha (within existing boundary)

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>This site is situated on the B6246 adjacent to a residential area opposite and to the south west. The site extends towards a rail line approx. 250m to the east. There is also an industrial equipment auctioning company and associated storage immediately to the south of the site. The site is known as Mitton Road Business Park and contains a number of small industrial and office units which have extended beyond the site boundary immediately to the South, with further room for expansion beyond.</p>	
<p><b>Local Plan Designation</b></p>	<p>The Housing and Economic Development Plan Document identifies the site as falling within the provisions of Policy DMB1 (Committed/Existing Employment Site).</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<ol style="list-style-type: none"> <li>1. 3/1991/0776/P Change of use of redundant buildings from agriculture to B8 Class X Warehouse, repositories. Approved with conditions.</li> <li>2. 3/1991/0775P Change of use of redundant buildings from agriculture to B1 (C) class III Light industry, Approved with conditions.</li> <li>3. 3/2015/0235P Proposed demolition of existing commercial premises and construction of 4 small industrial buildings to house 21 starter units of approximately 70 sqm per unit, site access improvements and extensive new tree planting at the former Genus Site, Mitton Road Whalley, BB7 9JY. Approved with conditions</li> <li>4. 3/2016/0715 Outline planning consent for the extension to industrial estate 0.92h including access. Approved with conditions 08/11/2016 (Phase 2)</li> <li>5. 3/2017/0080 Outline application for extension to industrial estate with all matters reserved. Approved with conditions 30/3/2017 (Phase 3)</li> <li>6. 3/2017/0530 Proposed extension to units 16-21 (phase 1) decision not reached.</li> </ol>	

	7. 3/2017/0714 Extension to existing industrial estate (Class B1, B2 and B8 use) to include car parking, landscaping and service infrastructure. Approved with conditions 01/12/2017 (Phase 3)	
<b>Current Use and Land Type</b>	<p>Phases 1 of the development is complete and consists of the 4 most northerly units within the site boundary. Phase 2 and 3 received permission under one application (3/2017/0714) and will be built together. The 3 completed units within the southern border of the site boundary are part of phase 2. One further unit was completed than is shown in Google Earth imagery above.</p> <p>All of the completed units are occupied, with a handful of other units towards the rear of site nearing completion. Groundworks for the remaining buildings of phase 2/3 have begun with construction equipment present on site. The layout incorporates an internal estate road which has the potential to unlock land to the south which lies outside the current site boundary. However, there is currently no application in place for further units beyond phase 3 which would in any event be beyond the boundary identified for this assessment. A phasing plan showing all permissioned units can be found accompanying application 3/2017/0714.</p>	
<b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)	The completed units on site are fully occupied. Advertising boards at the entrance show vacant units but none are available when following up on the agents' website. The site houses a number of small manufacturing companies and trade counter uses.	
<b>Strategic Road Access</b>	<p>Strategic road access is via the A59 or A671; however this requires driving through the residential area of Whalley and under a low railway bridge with a maximum height of approx. 3.8m. Going northwards the A59 can then be access via the A671 (a 2.5km drive from the site) or southwards via King Street/Whalley Road (a 5km drive from the site).</p> <p>The A59 connects with the M6 at junction 31 approx. 18km to the east of the site.</p>	POOR
<b>Local Road Access</b>	Local road access is provided by the B6246 heading north and the A59 heading north east and south west.	AVERAGE
<b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)	The site is approx. 1.2km north of Whalley, which features a range of amenities and a train station. There are bus stops outside the site entrance.	AVERAGE
<b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)	There is a row of residential units directly opposite the site and an industrial/storage site to the south. The wider site extends to a rail line to the east. There is farmland north of the site. The site is compatible with small scale industrial/retail/office units such as those already present due to the nearby residential areas.	AVERAGE
<b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and	The original outline applications assessed the potential for the proposed development to have a negative impact on amenity of the residents living on Mitton Road. Taking into account the distance between the	GOOD



communications infrastructure; flood risk; contamination; nature and heritage conservation)	existing properties and the boundary of the proposed industrial site together with the ability for the Council to impose planning conditions it was considered that the development could be suitability controlled to avoid any serious negative impact on residential amenity. Outside the site boundary is grass land suitable for expansion of the site with similar uses.	
<b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)	The completed units are currently fully occupied. Nearby residential use would suggest that further units are occupied with similar light manufacturing or trade counter uses.	GOOD
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	The completed units are fully occupied, and the room for expansion of the site makes the site an attractive market proposition for further development and employment use. Agents confirmed that all completed units are occupied and there is a waiting list for the units under construction.	VERY GOOD
<b>OVERALL SITE RATING</b>	<b>GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	Light industrial/Trade Counter/Office  <b>Retain and protect for employment use in accordance with Policy DMB1. Extend site boundary to include phase 3 development and up to the rail line to the south and east.</b>	

#### **SITE SUMMARY:**

This is a small and attractive business park opposite a residential area that features a number of small manufacturing, trade counter and office uses. A second and third phase of construction is underway with some units already completed outside the site boundary. There is also room for further phases to the east of the site. The main issue relates to access to the local and strategic road network which requires driving through the residential area of Whalley and under a low railway bridge. Despite this, agents confirmed that demand for new units at this location is strong with a waiting list in place. Therefore the site should be protected for employment use and further development, with the site boundary extended to incorporate phase 2 and 3 as well as possible further development on the land to the south and east.

Site Name: Fairfield Business Park, Clayton-le-Dale



**GROSS SITE AREA:**  
0.76 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
0 ha

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>The site comprises a rural and relatively isolated business park located on the A59 east of Osbaldeston.</p>	
<p><b>Local Plan Designation</b></p>	<p>The site is designated as an existing employment area (Policy DMB1)</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>3/2021/0598 - Certificate of lawful use (proposed) for the alteration and extension of an existing industrial building – Approved with conditions</p> <p>3/2018/1176 - Erection of new building (Use Class B1) containing two new industrial units. – Permission not required</p> <p>3/2017/1178 - Resubmission of planning application 3/2009/0628 to allow re-siting of previously approved unit to provide B1 business use including office space and B8 storage. – Approved with conditions</p> <p>3/2015/0795 - To erect an office building (Class A2) adjacent to existing B1/B8 buildings. – Approved with conditions</p> <p>3/2015/0309 - Proposed office building (Class A2) adjacent to existing B1/B8 buildings. – Refused</p> <p>3/2011/0823 - Proposed small B1/B8 unit to be positioned between existing units 1 and 2. – Approved with conditions</p>	
<p><b>Current Use and Land Type</b></p>	<p>This business park is occupied by a number of small and irregular retail, manufacturing and office units. Businesses include a garden furniture manufacturer, bicycle shop, pet shop and café with some more manufacturing use towards the rear of the site. The site sits on former farmland with the farmhouse remaining in</p>	

	residential use just beyond the south west corner of the site boundary.	
<p><b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)</p>	<p>There are no vacant units on the site. A new unit/extension is currently under construction in the centre of the site. No further room for development remains within the site boundary.</p> 	
<p><b>Strategic Road Access</b></p>	<p>The site is accessed directly from the A59, providing strategic road access and connecting with the M6 at junction 31 approx. 7.5km from the site.</p>	<p><b>VERY GOOD</b></p>
<p><b>Local Road Access</b></p>	<p>Local road access is provided via the A59.</p>	<p><b>VERY GOOD</b></p>
<p><b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)</p>	<p>The nearest Local centre is Mellor approx. 1.5km south of the site and Clayton-le-Dale/Wilpshire approx. 3km east of the site. Both offer a small range of shops/amenities. The town of Blackburn is approx. 5km south of the Site. None of these centres are reasonably accessible by foot. Bus access is, however, provided via a dedicated bus stop on the A59.</p>	<p><b>VERY POOR</b></p>
<p><b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)</p>	<p>The site is surrounded by Farmland with a few houses on the opposite side of a field approx. 75m from the site. There is also a residential street approx. 250m north west of the site. The site is compatible with smaller scale E(g)/B2 use of the type already present. The site and the adjacent field fall within a Minerals Safeguarding Area (Policy EN3). Ownership of this</p>	<p><b>GOOD</b></p>

	field is unknown and expansion would bring the business park closer to existing residential uses.	
<b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)	The site is fully built out.	<b>VERY GOOD</b>
<b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)	The site is fully built out.	<b>VERY GOOD</b>
<b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed)	The site is fully built out.	<b>VERY GOOD</b>
<b>OVERALL SITE RATING</b>	<b>GOOD</b>	
<b>Recommendation and Potential Future Uses</b>	<b>Small scale office/industrial/retail</b> <b>Retain and protect for employment use in accordance with Policy DMB1.</b>	
<b>SITE SUMMARY:</b>		
<p>This business park is occupied by a number of small and irregular retail, manufacturing and office units. There are no vacant units on the site. A new unit/extension is currently under construction in the centre of the site. No further room for development remains within the site boundary. The site has a relatively unique offer for small traders, is fully occupied and is clearly meeting local needs. Therefore, the site should be retained and protected for employment use.</p>		

**Site Name: Land Adj. to Simonstone Lane, Time Technology Park, Simonstone**



**GROSS SITE AREA:**  
0.55 ha

**ESTIMATED NET DEVELOPABLE AREA:**  
0.50 ha

CRITERIA	COMMENT	RATING
<p><b>Site Context</b></p> <ul style="list-style-type: none"> <li>• Location with regards to existing employment areas and other sites</li> <li>• How the site fits into the overall portfolio</li> </ul>	<p>The site comprises brownfield land that currently consists of an open storage area towards the rear of the existing Time Technology Business Park. This is a security gated business park which currently accommodates a number of B2 and B8 uses. The site is located to the rear of two existing industrial units with access from the business park, and has a boundary with a disused rail line to the north.</p>	
<p><b>Local Plan Designation</b></p>	<p>The Housing and Economic Development Plan Document identifies the site as falling within the provisions of Policy DMB1 (Committed/Existing Employment Site).</p>	
<p><b>Status in SHLAA</b></p>	<p>N/A</p>	
<p><b>Planning History</b></p>	<p>A previous outline permission for 1,769 sqm of office and industrial floorspace (2008/0284) has now lapsed</p>	
<p><b>Current Use and Land Type</b></p>	<p>Site is currently used for open storage and is somewhat under-utilised.</p>	
<p><b>Occupier Profile</b> (if partly developed, including % of available land and levels of vacancy onsite)</p>	<p>Open storage with some land under-utilised to the east.</p>	
<p><b>Strategic Road Access</b></p>	<p>The wider Time Technology business park is accessible directly from the A678. The A678 provides access to the M65 at Junction 7 to the south west and Junction 8 via the A6068 to the south.</p> <p>Simonstone Lane also connects with the A671 approx. 1km to the north.</p> <p>The site sits at the rear of the business park and access requires driving between existing B2 uses on the site.</p>	<p><b>GOOD</b></p>
<p><b>Local Road Access</b></p>	<p>Local road access provided by Simonstone Lane and the A678.</p>	<p><b>GOOD</b></p>

<p><b>Proximity to Urban Areas and Access to Labour and Services</b> (including public transport / cycling / walking accessibility)</p>	<p>The site is approx. 1.5km from the urban areas of Simonstone to the North and Padiham approx. 1.8km to the east. Both are walkable via footpaths. There are no dedicated cycle lanes.</p> <p>Local transport access is provided by bus stops on the A678 approx. 250m from the site which service Calder Vale and Time Technology business parks.</p>	<p><b>GOOD</b></p>
<p><b>Compatibility of Adjoining Uses</b> (including amenity impacts experienced by current/future occupiers and neighbouring areas)</p>	<p>The site sits within Time Technology Park which contains a range of B2 and B8 uses, as well as a new business park offering smaller E(g)/B2/B8 units to the east. A larger site occupied by Port Vale Engineering sits opposite the site on the other side of Simonstone Road. The site is also less than 1km from other business parks at Altham and Shuttleworth. There is a row of houses on the opposite side of Simonstone Road approx. 100m south east of the site and a further small residential road approx. 250m to the north but is buffered by trees and other mature vegetation. The site is therefore compatible with a range of smaller-scale E(g), B2 and B8 uses.</p>	<p><b>VERY GOOD</b></p>
<p><b>Developmental and Environmental Constraints</b> (e.g. size; topography; site access; roads, lighting, landscaping, mains utilities and communications infrastructure; flood risk; contamination; nature and heritage conservation)</p>	<p>The site is PDL with a predominantly hard standing surface. Trees and bushes run alongside the northern boundary of the site as well as in an overgrown part of the north east corner. The site sits on a slight incline towards the northern boundary.</p>	<p><b>AVERAGE</b></p>
<p><b>Barriers to Delivery and Mitigation</b> (including ownership constraints - if known)</p>	<p>Ownership of the site is unknown; however, it is used as open storage and also as a loading/service yard for occupiers of existing units which may be a barrier to development of a more intensive use. A previous assessment recorded the presence of a disused rail line on the site.</p>	<p><b>AVERAGE</b></p>
<p><b>Market Attractiveness</b> (including appropriateness, vacancy and market activity on site for the type of development proposed).</p>	<p>Whilst the site is appropriate for B2/B8 use, its function as a storage/service for existing occupiers of Time Technology Park may limit its attractiveness and ease of development. In this respect the site may be best utilised as expansion for an existing occupier. There are also a number of other industrial parks within 1km of the site that would likely prove more attractive locations.</p>	<p><b>POOR</b></p>
<p><b>OVERALL SITE RATING</b></p>	<p><b>AVERAGE</b></p>	
<p><b>Recommendation and Potential Future Uses</b></p>	<p><b>Industrial/Storage</b></p> <p><b>Retain and protect for employment development in accordance with Policy DMB 1. It is recommended that the site boundary is redrawn to match the available space.</b></p>	

**SITE SUMMARY:**  
This is a small site to the rear of existing industrial units at Time Technology Business Park. The site is currently used as a storage/service yard for existing occupiers and is partially hard surfaced and slightly overgrown. Due to its current use and availability of other industrial units within Time Technology business park and other nearby industrial estates this site is unlikely to be attractive for unrelated employment development, but still presents some potential for a modest expansion to Time Technology business park.

# **Appendix 2 Standard Plot Adjustment Assumptions**

### GROSS TO NET ADJUSTMENTS IN EMPLOYMENT LAND ASSESSMENTS

Take-up of employment land is typically recorded on a plot by plot basis, which equates to a net developable area. To be consistent, availability should be measured on the same basis. So for some sites, gross to net adjustments may be appropriate.

We have considered each site and estimated the proportion of land likely to be lost to servicing and landscaping, having regard to gross to net ratios achieved on industrial estates and business parks elsewhere in the region. Research by storeys:ssp has shown that ratios range from 100% where a site is in single occupation, to 56% for a business park on a sloping site with large areas set aside for landscaping and sloping banks between development plots.

Adjustments appropriate in different circumstances are set out below.

#### GROSS TO NET RATIOS ADJUSTMENTS FOR EMPLOYMENT LAND

Type	Ratio	Comment
Serviced plot on industrial estate fronting road.	100%	
Area of land that could easily subdivide into serviced plots with road frontage.	100%	
Large area of land on industrial estate too big for single scheme, having regard to other buildings on estate.	95%	Provision for spur road.
Major undeveloped part of industrial estate or extension to industrial estate.	90%	Provision for roads and landscaping to one or more sides.
Small local allocation, requiring infrastructure.	90%	Provision for spur road, but landscaping likely to be minimal.
Level site allocated for industrial estate.	85%	Provision for spur road and landscaping.
Site allocated for industrial estate where terracing or bunding required.	80%	Provision for spur road and landscaping.
Land allocated for business park with high landscape quality.	75%	Provision for spur road extensive landscaping, balancing ponds etc.
Land allocated for employment use where a single end user could be in the market.	100%	All land to be taken by single user, surplus areas to be kept for its expansion.



## **Appendix 3 Criteria used to Appraise Sites**

## **RIBBLE VALLEY ECONOMIC AND EMPLOYMENT LAND NEEDS STUDY – SITE ASSESSMENT CRITERIA**

The criteria for assessing potential new employment sites are set out below. These criteria mainly relate to the inherent value of a site rather than current conditions on it, although such characteristics would also be noted where applicable. Ownership and availability information may not be possible to obtain in many cases and a judgement may need to be made on these criteria.

Each site is given a rating of between ‘very poor’ and ‘very good’ against each criterion. No individual weightings would be attached to different criteria.

**Site Context:** Location with regards to existing employment areas and other sites, how the site fits into the overall portfolio.

**Local Plan Designation:** Allocation status in existing/emerging Local Plan and any other designations.

**Status in SHLAA:** Commentary on whether the site was identified in the most recent SHLAA/HELAA.

**Planning History:** Brief description of any relevant extant or recent planning permissions affecting the site. This would also pick up any current planning applications that have yet to be determined.

**Current Use and Land Type:** Commentary on existing land uses at the site, based on site observation.

**Occupier Profile:** Names and business types if partly developed, including % of available land and levels of vacancy onsite.

### **1. Access to strategic road network:**

For the purpose of this assessment strategic roads are defined as comprising the main A and B roads in the Local Authority, including the A59, A666, A671, A680, A682:

**Very Good:** Direct access to main A road.

**Good:** within 1 km of access to a main A road.

**Average:** within 2.5 km of access to a main A road or a usually free flowing strategic road, via good unconstrained roads.

**Poor:** within 5 km of access to a main A road or a usually free flowing strategic road, via good unconstrained roads.

**Very Poor:** over 5 km from strategic road junction or access, and/or through constrained or local roads, and/or through town centre or residential areas.

### **2. Local road access including congestion and quality of roads;**

**Very good local access:** via free moving good roads avoiding residential areas/difficult junctions.

**Very poor:** difficult/narrow road access, via residential roads, difficult junction, congested roads.

*NOTE: if the site is yet to be developed it is not unreasonable that local transport infrastructure has yet to be installed. If this is the case, and (for example) an extant planning permission makes provision for suitable transport infrastructure to be installed at a later date, this is reflected in the overall commentary and the final overall site rating.*

### **3. Proximity to urban areas and ease of access to labour & services;**

Urban areas **are** weighted according to the Council’s Settlement Hierarchy (2008).

**Very good:** near Clitheroe, Whalley or Longridge (i.e. within 1km); good pedestrian access to residential areas and public transport connections (i.e. on a regular bus route to residential areas and in close proximity to a bus/rail stop).

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**Good:** within, or with good access to, a middle tier settlement (i.e those scoring above 20 in the Settlement Hierarchy); and also in close proximity to sizeable residential areas providing local labour supply.

**Average:** within, or with good access to a middle tier settlement; and also accessible to residential areas providing some degree of local labour supply.

**Poor:** within, or with good access to a neighbourhood / small rural centre.

**Very poor:** remote site, no services or residential areas nearby (i.e. over 5km away) and very poor public transport accessibility.

#### 4. Compatibility of adjoining uses:

Amenity impacts experienced by occupiers (current or future) and neighbouring areas:

**Very good:** within larger employment area/ no incompatible surrounding land use.

**Average:** Use Class E business uses adjoining residential/other sensitive uses.

**Very Poor:** B2/B8 adjoining residential/other sensitive uses.

#### 5. Site characteristics and development constraints (including size, topography, site access, roads, lighting, landscaping, mains utilities and communications infrastructure, flood risk, contamination, nature and heritage conservation etc):

**Very good:** generally level site, regular shape, over 1 ha in size; well served by good quality site infrastructure; no significant other constraints on development.

**Very poor:** sloping/uneven site; under 0.1 ha, irregular/narrow shape; lack of site infrastructure; other severe constraints (i.e. within HSE exclusion zone, flood zone 3b etc).

#### 6. Barriers to Delivery and Mitigation: e.g. infrastructure required, groundworks and remediation, ownership constraints if available.

**Very good:** site available and in single ownership and limited infrastructure / mitigation required for delivery.

**Very poor:** site unavailable and/or in many small separate ownerships with risk of ransom strips, requires adjoining land to be developed first, abnormal infrastructure requirements contamination constraints, electricity pylons etc

#### 7. Market Attractiveness, including appropriateness for industrial/commercial development, vacancy and market activity on site for the type of development proposed. Outcomes from discussions with Local Agents on wider market conditions in the local area e.g. levels of supply, changes in rents, length of time marketing sites, level of demand, types of demand etc.

**Very good:** viewed as attractive by agents/occupiers; area of strong demand for intended use; low vacancy levels; high profile location (i.e. visually adjoining a trunk road/key junction/beside a successful existing business park or industrial estate) etc. Market signals could include low supply, increasing rents, marketing times reducing, high demand.

**Very poor:** area of low demand; difficult to attract occupiers; high vacancy levels; low-profile location. Low demand market signals could include: high supply, decreasing rents, increasing marketing times, low demand.

#### 8. OVERALL SITE RATING: Judgement based on a comprehensive assessment of the 13 key criteria. Sites to be ranked as good / average quality for protection including which 'high quality' or 'strategic sites' should continue to be or become safeguarded for employment (Class E and B) uses. Poorer quality sites will be identified for upgrading, or release to alternative uses. Sites can also be ranked in terms of deliverability.

**Recommendation and Potential Future Uses:** Identifies whether the site should be prioritised,

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safeguarded, retained for employment uses or considered for release. Recommendation of appropriate potential uses (cognisant of location requirements /preferences of key sectors).

**Site Summary:** Conclusions on the current situation and future prospects.

## **OTHER FACTORS TO BE NOTED FOR SITES WITH EXISTING DEVELOPMENT**

### **Type of Use**

- B1/B2/B8, other

### **Vacancy Levels**

- Estimate of proportion of vacant floorspace

### **Age of Premises**

- Pre-1970
- 1970-1990
- 1990-2000
- Post 2000

### **Condition of Premises**

- Good
- Average
- Poor
- Derelict/no longer in use

### **Amount of Development Land Available**

- Under 10% of site undeveloped
- Over 50% of site undeveloped

### **Potential for Alternative Employment Use**

- Good for bad neighbour or niche uses
  - Potential to sub-divide for starter units
  - Scope to upgrade for employment use
  - Remove undesirable use.
-



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