

# Central Lancashire Employment Land Study — Land Supply and OAN Update 2024

Preston, Chorley and South Ribble Councils

Final Report

February 2025

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## EXECUTIVE SUMMARY

- i) This report provides a partially updated Employment Land Study for the Central Lancashire sub-region and its component local authority areas of Preston, Chorley and South Ribble. The study was commissioned to provide an update of the Central Lancashire Employment Land Study (ELS), produced in 2022 by BE Group. It reviews the potential future employment land supply of the three local authorities, in the light of changing market conditions. It also provides a revised and updated Objectively Assessed Needs (OAN) exercise to reflect a different forecast period for the emerging Central Lancashire Local Plan (CLLP), 2023-2041, changing macro-economic conditions, updated forecast methodologies and the latest population projections for Central Lancashire.

### **Methodology**

- ii) Several research methods have been used, including site visits and telephone/e-meeting interviews with property market stakeholders such as developers, investors and their agents. The status and deliverability of potential future employment sites, put forward for inclusion in the CLLP, was reviewed in detail, compared to forecast OAN and changes in local and national property markets since 2021.
- iii) The Study has also undertaken an updated OAN forecast exercise to calculate need in Central Lancashire over the amended CLLP period 2023-2041. It should be noted that this OAN exercise uses a substantially revised forecast methodology to that completed in previous ELS Studies, blending Labour Demand and Take Up based modelling. The reasons for this change in approach are:
- To reflect changing best practice in how to complete OAN exercises for employment land
  - To best reflect the latest National Planning Policy Framework and Planning Practice Guidance
  - To provide a stronger link between forecast jobs change, which will inform other elements of the CLLP such as housing needs, and identified employment land OAN, while recognising some of the issues with translating jobs need directly into an employment land requirement
  - To provide a more nuanced and finer grain analysis more generally
  - To reflect the recent precedents and outcomes of recent North West Local Plan Examinations in Public, which BE Group has participated in.

- iv) One result of this change is that the OAN figures produced here will not be directly comparable with those in the Central Lancashire ELS Studies of 2017, 2019 and 2022. Finally, the OAN has been compared to the latest population projections for Central Lancashire, to understand how economic growth links to population change in the sub-region.

## **Market Findings**

### ***Industry***

- The national manufacturing sector boomed over 2020-2021. Demand reduced somewhat in the second half of 2022 in the face of growing economic uncertainties, but 2022 remained one of the strongest years on record in terms of the take up of industrial stock.
- The market has proved resilient in 2023, despite growing economic uncertainties. In Central Lancashire, this is evidenced by the recent commencement/completion of several private sector B2/B8 schemes including Botany Bay Business Park in Chorley, units at Preston East and Farington Hall in South Ribble, with further phases of both in the pipeline. Nationally, the industrial market has seen continuing requirements from manufacturers for new build high grade space, both from local firms and larger companies seeking to re-shore and safeguard their supply chains within the UK.
- Industrial demand is projected to remain strong in the short term, even if macro-economic conditions prove worse than forecast.
- Local market stakeholders added that while economic issues mean that industrial/warehouse units are less attractive to investors but there remains strong demand from occupiers, for properties of up to 2,000 sqm and particularly sub-1,000 sqm units.
- Against demand, and even with recent completions of new schemes, the sub-region has a limited supply of premises to meet forward needs, some 8.8 months of forward industrial supply by units, 6.5 months by floorspace, based on past average rates of take up per year. Against total stock, vacancy rates across Central Lancashire are well below 5 percent, which also suggests supply shortages.

*Thus, while some slowdown in the industrial market is possible in the short term, if economic conditions deteriorate, overall demand remains strong, particularly from*

*smaller occupiers for sub-2,000 sqm units. With reasonable demand and a limited supply, developers are continuing to bring forward industrial schemes in core areas of market interest with no sign of a slowing in the pipeline.*

### **Warehousing**

- Across the UK, demand for logistics premises increased significantly in 2020-2022 in response to the changing consumer behaviour. After three years of record breaking take up, stakeholders expect transaction rates in 2023 to be more moderate, but still well above the 10-year average.
- Reduced consumer spending may inhibit demand from retailers moving forward, logistics requirements are now coming from an increasingly diverse range of occupiers.
- While logistics growth will continue to be focused on prime locations on the motorway corridors, supply shortages will encourage the take up of good secondary locations as well. In Central Lancashire, all three local authorities have large sites close to motorway junctions which can benefit from ongoing demand for larger B8 uses.

*Thus, while B8 demand may see relative decline from the record-breaking period of the early 2020's, a good interest in warehousing units is expected to continue, on locations with reasonable strategic road access.*

### **Offices**

- During the 2020-2021 lockdowns, office-based firms adjusted to being able to work remotely and evidence is that the majority of office-based businesses continue to offer at least hybrid working options to some of their staff. Reflecting this trend, businesses are increasingly seeking flexibility in their office accommodation. This new way of working favours serviced offices, co-working spaces and similar models over unserviced options. Demand exists for more such serviced space, but primarily on sites with good motorway access rather than town or city centres. In Preston, demand is focused on Preston Docks rather than the City Centre.
- For larger floorplate offices, in the light of changing working practices, established businesses have reviewed their long-term accommodation needs leading to a rationalisation of space with poorer quality accommodation returning to the market, while more modern offices are occupied.

- The net result is that there is a surplus of lower grade stock while more higher grade stock is needed. The surplus issue is made worse by the fact that around 12 percent of the UK's office stock are graded below EPC band E and will not meet future energy efficiency standards. Given demand, some buildings may be suitable for upgrading to accommodate service stock, but many others will become 'stranded assets' – unable to be let out in their current condition and unable to secure a large enough rent to make investment worth it. There is likely to be considerable pressure to convert some of this stock into other uses, using Permitted Development Rights moving forward, leading to a net loss of stock. However, as this stock is surplus to business needs, its loss is unlikely to leave businesses without the space they need and therefore prompt development elsewhere. Against total stock, vacancy rates across Central Lancashire, except for in South Ribble, are mostly in the 5-10 percent range, which also suggests there is sufficient stock to meet most needs.
- Average office rents do not exceed £14.50/sqft (£150/sqm), even in Preston City Centre and key business parks, with £10-11/sqft (£108-118/sqm) more the norm in Preston and South Ribble (slightly higher in Chorley). This can be compared to £25/sqft (£269/sqm) for good grade A accommodation. Thus, stock in Central Lancashire does not see particularly high rents and stakeholders do not identify affordability as a particular barrier to occupancy anywhere in Central Lancashire.
- Past take up and present stated market demand is for 0-500 sqm units, including freehold options and particularly Grade A options, alongside a modest number of larger requirements. However, viability remains a significant barrier to new development.

*Recent office sector growth has been limited in Central Lancashire and changing working practices have affected, and will continue to affect demand, particularly for larger floorplate offices. While some demand exists, particularly for sub-500 sqm serviced units, viability will be a significant barrier to further new build office development moving forward. Accordingly, large scale office development is not assumed on any of the sites reviewed in this Study.*

#### **Objectively Assessed Needs**

- v) This Study was asked to provide an updated OAN forecast model for Central Lancashire to reflect the revised CLLP period 2023-2041. Also to reflect the most up to date methods for modelling employment land needs, consistent with the National

Planning Policy Framework and Planning Practice Guidance.

- vi) Model One is Past Take Up, the forward projection of historic take up across Central Lancashire since 2010/2011. Figures both gross and net of losses have been provided by the Councils.
- vii) Model Two is Labour Demand, a baseline or Policy-Off forecast which, as mentioned, makes no allowance for major public policy interventions in Central Lancashire. This scenario uses as its base the latest economic forecasts (winter 2023/2024), produced by Cambridge Econometrics for LCC and covering the Central Lancashire sub-region. These forecasts are the latest available projection on macro-economic conditions and are used in other evidence base research for the CLLP, To the baseline jobs figures, adjustments are made to allow for Full Time Equivalent (FTE) employment and homeworking. With the resulting figures converted to floorspace and land needs using standard ratios.
- viii) To translate the baseline need figures into a preferred OAN, several further assumptions on land need have to be considered:
- An additional allocation of need to achieve a vacancy rate of 7.5 percent in local industrial, but not office, premises and deliver greater choice for businesses in their premises
  - A 5-year buffer to allow for choice and potential change in needs during the Plan Period as well as accounting for exceptional further losses in the supply.
  - Consideration as to what degree past losses of E(g)/B-Class land and premises, to other uses need to be accounted for in the OAN calculations. Preston has seen extensive losses of office and industrial premises over the last decade, and it is important to make some allowance for those losses, by using Gross Past Take Up Figures. By comparison office and industrial stock rates have been more static in South Ribble and even grown, in terms of industry, in Chorley. Thus, it is likely that if the individual buildings recorded lost in the above Take Up data, for Chorley and South Ribble, were still needed by the market, they would have been occupied. Reflecting this, Net Take Up rates are applied in the case of Chorley and South Ribble, making the assumption that day to day losses do not need to be replaced.
- ix) In terms of a preferred OAN for offices, experience suggests that the quantum of office

space required by businesses is strongly driven by the number of staff they have to accommodate. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward. Given changing working practices it would be logical to use figures which allow for homeworking. Thus, the recommended office sector OAN is set out in Table ES1, including the assumptions applied.

**Table ES1 – Recommended OAN for Offices**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	6.48	Labour Demand, net of homeworking Inclusive of Buffer equating to an extra 5 years
Preston	6.00	
South Ribble	5.76	
<b>Total</b>	<b>18.24</b>	

Source: BE Group, 2024

- x) Requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, in Central Lancashire, which is at odds with identified market demand. Here, therefore, the Past Take Up model is preferred as it is independent of jobs change projections and based on real world trends. Thus, the recommended industrial/warehouse OAN is set out in Table ES2, including the assumptions applied.

**Table ES2 – Recommended OAN for Industrial/Warehouse**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	34.97	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 19.61 ha A further Buffer of 5 years is applied on the Baseline figure An additional 9.35 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses

Preston	68.43	Baseline in the Take Up modelling, Gross of Losses (to provide allowance for the scale of industrial/warehouse losses recorded), for Industrial/Warehouse Uses only = 44.80 ha A further Buffer of 5 years is applied on the Baseline figure An additional 11.79 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
South Ribble	51.23	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 27.29 ha A further Buffer of 5 years is applied on the Baseline figure An additional 16.67 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
<b>Total</b>	<b>154.63</b>	

Source: BE Group, 2024

- xi) The combined OAN, linking office and industrial/warehouse needs, is therefore:
- **Chorley – 41.45 ha**
  - **Preston – 74.43 ha**
  - **South Ribble – 56.99 ha**
  - **Central Lancashire combined – 172.87 ha.**

***OAN Model 3: Labour Supply***

- xii) As part of the CLLP development process, consultants supporting the three Councils have identified an ‘Employment-led’ population growth scenario for Central Lancashire. There are two variations of this, one using a fixed 2011 Census commuting ratio (Employment-led) and the second using an adjusted 2011 Census ratio (Employment-led (CR 1-to-1)). In the CR 1-to-1 scenario, the 2011 commuting ratio has been adjusted in each year of the forecast so that future jobs growth is provided for under a 1:1 commuting ratio. These scenarios will inform assessments of housing need in the CLLP. These can be converted into a forecast of land needs, using a methodology comparable to that for Model 2. Undertaking this exercise generates employment land requirements of 9-12 ha for Chorley, 5-8 ha for Preston and 11-13 ha of South Ribble.
- xiii) It is important to note that these represent the employment land requirement specifically from the projected extra working population the sub region will gain to 2041 and, unlike Models 1-2, are not a forecast of OAN for the whole Central Lancashire economy.
- xiv) However, what Model 3 does illustrate the land required to accommodate projected population and jobs growth, and ensure the maximum number of those workers possible are able to live and work in the two local authority areas. The Preferred OANs

set out above allow enough employment land to accommodate the Model 3 requirements, while still providing some surplus of further land need to allow for other growth in the Central Lancashire economy, not linked to population change.

### Future Employment Land Supply Review

- xv) This Study has reviewed some 27 sites which have been identified for employment and mixed uses in Call for Sites/SHELAA and, as of summer 2023, could be taken forward in the CLLP to meet the identified OAN of each Local Authority. All the sites were reviewed in terms of both their qualitative attractiveness to the market and their likely deliverability, including consideration of some of the practical barriers they may face to development. Additionally, each site was graded using a standard scoring system that consisted of ten objective measures, which further illustrate the site's market desirability and deliverability. The maximum score possible was 100, with the ten individual measures each scored out of ten.
- xvi) Tables ES3-ES6 shows the outcome of this analysis. The sites are ordered by their quantitative scoring which provides a guide as to what could be prioritised for allocation, to meet the identified OAN. It should be noted that this analysis considers the suitability of sites for E(g), B2, B8 uses only, sites not identified as suitable for such employment uses could still be suitable for other uses.

**Table ES3– Sites Analysis – Chorley Preferred Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
CH/EP1.6 (19C244x and 19C162)	Botany Bay, Chorley	8.82	Site actively under development.	92	47	<b>Yes</b> (Site under development)
CH/EP1.1 (19C265x)	Southern Commercial, Buckshaw Village	2.04	One office successfully developed here. However, difficulties in letting the completed building suggest that the delivery of further offices here remains a longer term prospect. However, an unconstrained site remains, in the core Buckshaw Village market area, which could support a range of employment uses.	74	28	<b>Yes</b>
CH/EP1.7 (19C245x and 19C163)	Land East of M61	6.92	Deliverability is evidenced by development on site CH/EP1.6: Botany Bay, Chorley, which is under common ownership with this site and controlled by an established developer. The market	70	46	<b>Yes</b> (Assuming a successful development on CH/EP1.6 a

			continues to support at least the smaller units here and CH/EP1.7 could form a later phase of Botany Bay Business Park.			medium term development likely here)
CH/HS1.17 (19C415 and 19C161)	Botany Bay/Great Knowley, Blackburn Road	12.14 total (6.70 employment)	At the time of writing consent was being sought for 29,971 sqm of E(g), B2, B8 space on 6.30 ha. Even if the current planning application is not consented, interest has been demonstrated by an established developer who is actively delivering commercial premises on an adjacent site. There are constraints to overcome, and particularly agreement needs to be reached on a viable site access. However, developers appear to accept that this half of the wider Great Knowley site is deliverable for commercial uses.	70	43	<b>Yes</b>
CH/EP1.2 (19C267x)	The Revolution, Buckshaw Village	2.88	At the time of writing retrospective consent was being sought for B8 use of the site. Sizable, unconstrained development plot in Buckshaw Village which has been consistently identified by stakeholders as a focus for market interest for industrial and warehouse uses of all sizes in Central Lancashire. Land appears to have been held for the expansion of the adjoining use but remains available for a separate development subject to owner interest.	65	31	<b>Yes</b>
CH/HS1.15. CH/EP1.5 (19C242x and 19C160)	Woodlands Centre, Southport Road, Chorley	5.16 total (1.55 for employment)	The site is expected to become available for redevelopment in the short term. Demand here, as elsewhere, likely to favour industrial development here over offices. The barriers to development are thus likely to be integrating such uses with housing (which could cross fund the employment development) and integrating the protected trees into any scheme	62	30	<b>Yes</b>
CH/HS1.20, CH/EP1.8 (19C250x and 19C188)	Bengal Street Depot, Chorley	0.70 total (0.35 for employment)	Assuming an uncontaminated plot with appropriate access onto the A6 can be secured a small industrial scheme would be deliverable here, reflecting other successful developments on similar plots, such as the Vyking Enterprise Hub.	61	34	<b>Yes</b>
CH/EP1.9 (19C050)	Land at Euxton Park Golf Centre, Euxton Lane, Chorley	0.69	There is an established interest in the land from the landowner for development for its own purposes. However, the interest would be for the whole Golf Centre site, including previously undeveloped Green Belt land, to support a large warehouse and office scheme. Only the previously developed part of the site is being considered, which is a narrow, linear plot and would be too small to accommodate this use and likely of negligible interest to local developers who would be seeking a larger and more regularly shaped development site, comparable to the plots at Strawberry Meadows.	55	28	<b>Maybe</b> (Dependant on what land is ultimately allocated here)
CH/HS1.10, CH/EP1.3 (19C100 and 19C119)	Land at Bagganley Lane, Chorley	13.32 total (2.65 employment)	Site is likely to become more of interest to commercial developers once sites closer to Junction 8, M61 are developed out. Assuming an interested developer can be found for the commercial part of the scheme, the main barrier to delivery is	49	31	<b>Yes</b>

			likely to be access. It is assumed the commercial element would fall in the west of the site, as close to Blackburn Brow as possible to minimise the traffic impacts on the more residential streets of Knowley Brow/Heapey Road.			
CH/HS1.13, CH/EP1.4 (19C239x, 19C093 and 19C165)	Cowling Farm, Chorley	9.50 total (0.30 employment)	Largely unconstrained land, with access available via Moorland Gate. The main barrier to delivery is likely to be the site's relative isolation compared to other opportunity plots and the modest size of the employment plot proposed. Absent a requirement from a business for the land or an immediate developer interest, delivery will likely require leadership and co-ordination by landowner Chorley Council.	47	21	<b>Maybe</b> (Will require public sector support and co-ordination to realise)
CH/HS1.37, CH/EP1.11 (19C411)	Land south west of The Green and Langton Brow, Eccleston	2.38 total (1.19 employment)	Site does have some constraints, including how Grove Mill, which covers a large portion of the site, would be treated in any scheme and potential issues of flood risk. However, the site is under developer control and any employment uses put forward here would be building on an established employment location, albeit one in a peripheral location in the Borough, which may be subject to a complete redevelopment/replacement of existing uses.	36	18	<b>Maybe</b> (Assuming site constraints can be addressed)

Source: BE Group, 2023

**Table ES4 – Sites Analysis – Preston Preferred Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
(19P329)	Land and Buildings at St Marys Street, Preston	0.87	Site scoring reflects the central location of the properties. Site comprises the former Museum of Lancashire buildings and the Lancashire Conservation Studios in former Church buildings. All owned by LCC. The Museum buildings are in use for storage at this time. LCC officers report interest from the Ministry of Justice for the use of these buildings for a range of uses. The Lancashire Conservation Studios remain in use by LCC for historic preservation work. It appears the site will remain in public sector use.	69	40	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P286)	St Marys and St Marks, St Mary Street, Preston	1.75	Site scoring reflects the central location of the properties. Site comprises the former Museum of Lancashire buildings the HMRC buildings of St Marks/St Mary's House and a row of occupied shops on the A59 frontage.	68	41	<b>No</b> Land is in an existing Employment Area so already in employment use

			At the time of writing, it appears likely that the former Museum of Lancashire buildings will remain in public use. St Mark's House and St Mary's House, was due to close in 2025. In April 2023 it was announced that more than 1,000 HMRC jobs will remain in Preston for the long term. HMRC has yet to determine whether St Mark's House and St Mary's House will be retained or if a new base will be established elsewhere in the city. A59 shops are in full use.			
(19P141)	Preston East Junction 31A M6	25.31	A developer partner, Trebor Developments (in a Joint Venture with Hillwood developments), has been secured. The site, known as Gateway Park, is now on the market for 3-4 B2/B8 units of 3,065 sqm to 74,322 sqm. Subject to planning, it is intended that units will be available for occupation by 2025. This site is now under the control of an experienced developer with capacity to deliver space in the short term, subject to planning. Although stakeholders report a weakening market for larger units, demand still exists, particularly at the regional and national level. The almost immediate M6 access from Junction 31(a), although southbound only, would make the site attractive to large occupiers.	64	43	Yes
(19P135)	Red Scar Industrial Estate / Red Scar, Whittingham Lane, Broughton	12.02	Land in an established industrial estate. A range of smaller uses have been successfully delivered in Red Scar, most recently Unit B23 Red Scar Industrial Estate. Funding and development partners are understood to be in place for the Longridge Road Energy Centre, the development of which will further open up this site. The remaining land will surround the energy from waste facility. This facility will make the location less attractive to some occupiers, but experience elsewhere suggests there remain plenty of industrial and warehouse occupiers who will be located close to such a facility. Indeed, the Longridge Road Energy Centre may attract supply chain businesses, for this sector to Red Scar.	61	30	No Land is in an existing Employment Area so already in employment use
(19P136)	Millennium City Park, 4A Barnfield Way, Broughton	0.49 (reflecting planning application)	Subject to multiple schemes for mostly industrial land which, if delivered would take up all developable land here.	58	21	No Land is in an existing Employment Area so already in employment use
(19P012 and 19P198)	Alstoms, Strand Road	6.35	Site already accommodates several high value B2/B8 tenants, and any future scheme should look to build on this existing critical mass. The site falls into the Riversway/Docks area, which	57	31	Yes

			<p>has been consistently identified by stakeholders, across multiple studies, as a focus for market interest for industrial, and when required, office uses.</p> <p>Any scheme would need to consider any historic premises which would need to be protected, the desirability of retaining existing high value tenants and allowing for the leases on the site. The site is owned by the City Council which would allow the Council to lead on and support any scheme.</p>			
(19P142)	11 Roman Road Farm	24.94	<p>The site now has Outline consent (App. No. 06/2022/0745) for 76,445 sqm of floorspace, of which 71,721sqm is for B2/B8 use and 4,724 sqm is for first floor offices.</p> <p>Reserved Matters consent (App. No. 06/2023/0844) is being sought at plots 6 and 8 within outline site for a 13,686 sqm warehouse, for an agreed occupier. Although a backland site, the land links to the core market area of North East Preston.</p> <p>The consented scheme is now on the market as APTUS for 11 units of 2,404 sqm to 13,686 sqm each, with consent now being sought to deliver the largest unit (Unit 8) for a defined occupier.</p> <p>Proposals are thus being progressed by a team of experienced developers – Henry Boot Barnfield – with the resources and experience to deliver the proposed development in the short term.</p>	55	29	<b>Yes</b>
(19P194)	Oak Street, City Centre, PR1 3XD	0.14	<p>Small infill site comprising an unsurfaced car park and some adjoining older buildings, close to the City Centre. Given the industrial character of the area the most likely be a light industrial scheme. As noted, demand for such premises is strong across Central Lancashire.</p> <p>Development of the vacant land would be comparatively straightforward. Including the adjoining properties, which appear occupied and under approx. two ownerships would be more difficult to deliver and may generate viability constraints.</p>	55	25	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P314)	22 to 24 Manchester Road, Preston	0.08	<p>Small site which appears in active use as a footsore, it is not clear if the site is available. If it is available for redevelopment, given the industrial character of the area the most likely be a light industrial scheme which is subject to good demand.</p> <p>The viability of a redevelopment on such a small site would need to be tested against a proposed scheme, but assuming a viable scheme can be secured redevelopment could be progressed.</p>	53	24	<b>No</b> Land is in an existing Employment Area so already in employment use

(19P133)	Red Scar Site H / Red Scar, Whittingham Lane, Broughton	2.75	Although a backland site, the land falls within an established employment area within North East Preston, regularly identified by stakeholders as the focus for industrial and warehouse market interest in Preston. Across Red Scar Industrial Estate, land is now on the market as some 16 design and build plots of 0.4-1.6 ha, capable of producing premises of 2,787 to 11,613 sqm for leasehold, long leasehold (125 years) or freehold basis. Constraints will limit the net developable area, but across Red Scar there remains a sizable area of flat, unconstrained land which is available for development reflecting the successful development of other sites in North East Preston, including the Preston East Scheme.	48	23	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P178)	Riversway Phase B Site Specific Policy, Maritime Way	17.13	Site forms a logical extension to the Preston Riversway/Preston Docks Employment Area with a common access at the Nelson Way/Chain Caul Way junction and the Riversway Motor Park adjacent. The Riversway/Docks area has been consistently identified by stakeholders, across multiple studies, as a focus for market interest for industrial, and when required, office uses. Site has multiple constraints including Flood Risk, watercourses crossing the site and pylons crossing the west of the site. The site is constrained but the development of adjacent land suggests such constraints can be overcome, particularly if a mixed-use scheme is put forward, which higher value options cross funding commercial uses. Opportunities to expand the successful motor Park could also be explored to deliver higher value uses which might fund appropriate mitigation. The land is owned by the City Council, allowing the Council to lead on and push forward any scheme.	48	29	<b>Yes</b>

Source: BE Group, 2023

**Table ES5 – Sites Analysis – Preston Mixed-Use Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
(19P031)	Land West of Cottam and East of Preston Western Distributor.	63.3	Given the scale and location of this site, it is assumed any scheme put forward would be housing led. Thus, the site should first be assessed against residential needs and	56	43	<b>Maybe</b> (Although the land sits in a relatively strong location, there are a range

		<p>requirement. It is also unclear if a full half of the site would realistically be brought forward for commercial uses in this mostly residential location, or be held for other options, such as open space.</p> <p>Assuming a large site for E(g)/B-Class Uses the most likely development would be for a strategic scale B2/B8 scheme. There remains reasonable market interest for such uses in Central Lancashire. The site enjoys a relatively prominent position on the new Western Distributor Road which an access point at the Avice Pimblett Way junction. However, developers and logistics businesses would likely prefer a location closer to the M55 Junction and more distant from housing development.</p> <p>Key for deliverability would be to agree the position of the employment site in relation to housing, and its accessibility to Edith Rigby Way and the M55. A clear plan would also need to be agreed between the landowners and developers as to how, and under whose responsibility, it would be to progress the employment element of the project.</p>			<p>of practical issues which would need to be address before an employment allocation could be considered)</p>
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Source: BE Group, 2023

**Table ES6 – Sites Analysis – South Ribble Preferred Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
SR/EP1.7 (SRBC001)	Samlesbury Enterprise Zone	35 (net developable area within South Ribble. From which completed properties will need to be deducted)	Deliverability is evidenced by the range of facilities developed to date and the infrastructure provided. Further growth will be supported by major national government investment National Cyber Force Campus.	76	38	<b>Yes</b>
SR/EP1.2, SR/HS1.1 (19S052)	Cuerden Strategic Site	31.93 (Identified net plot size of the four main commercial development plots in the planning application (16 ha) plus	Several schemes have been proposed here and ultimately not progressed due to a range of factors. There is a stronger commitment to taking things forward now however, with plans backed by an established developer partner and land under public sector control. Proposals, which have Outline consent, are now focused on B2/B8 premises which better reflects market	74	30	<b>Yes</b>

		15.93 ha of further development land) Full application site is 51.3 ha)	demand, with interest identified from national/regional and local businesses. Viability testing, submitted for the application and completed by CBRE in July 2022 ('Financial Viability Statement, Page 7) also indicates that the scheme is viable. Development is expected to come forward in phases to avoid oversupplying the market at any one time.			
SR/EP1.4, SR/HS1.8 (19S166) Previous Local Plan Site C2	Moss Side Test Track, Leyland (Titan Business Park)	5.7 (Area consented for commercial use)	Development is consented and under developer control. The scheme has been marketed off-plan and is attracting interest. The site has been fully remediated, and construction is set to commence in Autumn 2023 with the first units anticipated to be available in Quarter 1 of 2024.	73	28	<b>Yes</b>
SR/EP1.5 (19S188)	North of Lancashire Business Park, Farington	9.2	Ownership means that it is likely to be held as expansion land for adjacent Leyland Trucks. However, the land is outside of Leyland Trucks' secure site and could be made available to other occupiers. Bridging the River Lostock would be an additional cost to any development, which could generate viability issues. However, the bulk of the site would be developable without crossing the river.	66	38	<b>Yes</b>
SR/EP1.3 (19S119)	Farington Moss, Land at Lodge Lane, Flensburg Way and Penwortham Way, Farington	11.84	The Site comprises unconstrained greenfield land on a main road location. There are no strong barriers to delivery here and a site some 400 metres to the south, Farington Park, has been successfully developed speculatively for larger B2/B8 uses over the last two years, particularly for a 50,539 sqm B8 unit (NW.544) (App. No. 07/2020/00781/OUT).	55	37	<b>Yes</b>
SR/EP1.6 (19S190)	Land Adjacent to Leyland Business Park, Farington	2.1	The land is let to Ainscough Cranes for 14 years from 2010. Currently in use for open storage and the parking of cranes. The land is thus in use at present but remains available for development with no significant constraints. Ultimately delivery would be dependent on the plans of the owner. It would be well placed to support growth within an established Business Park, when needed.	54	17	<b>Yes</b>

Source: BE Group, 2023

## 1.0 INTRODUCTION

1.1 This report provides a partially updated Employment Land Study for the Central Lancashire sub-region and its component local authority areas of Preston, Chorley and South Ribble. It was carried out on behalf of Chorley and South Ribble Borough Councils and Preston City Council (the three Councils).

1.2 BE Group, Warrington-based economic development and property consultants, compiled this report during 2023-2024.

1.3 The study was commissioned to provide a partial update of the Central Lancashire Employment Land Study (ELS), produced in 2022 by BE Group. It reviews the potential future employment land supply of the three local authorities, in the light of changing market conditions. It also provides a revised and updated Objectively Assessed Needs (OAN) exercise to reflect a different forecast period for the emerging Central Lancashire Local Plan (CLLP), 2023-2041, changing macro-economic conditions, updated forecast methodologies and the latest population projections for Central Lancashire.

1.4 In detail, and reflecting BE Group's Submission letter of 18<sup>th</sup> October 2022, the Study aims to:

- *“Provide an updated high level understanding of the local/sub-regional property market in the rapidly changing conditions, evaluating the performance of the different property sectors in terms of levels of demand, take up of space and the current supply available to the business community, both in terms of land and premises*
- *Review the existing allocated and proposed employment land supply, as defined by the Councils, considering its fit to market demand and deliverability, engaging with site owners, developers and their agents. ... this Study will not review the developed Employment Areas, industrial estate and business parks, of the sub-region.*
- *Review the forecasting of Objectively Assessed Needs (OAN) as set out in Section 7.0 of the Central Lancashire Employment Land Study Update (2022) and consider its links to housing targets set out for the three authorities.*
- *In light of the above, provide relevant Conclusions and Recommendations on the scale, location and type of demand for employment land and property in Central*

*Lancashire, and how the proposed supply can meet that demand.”*

- 1.5 Subsequent to this, BE Group was asked to provide an updated OAN forecast for the revised CLLP period 2023-2041. That work is also included in this report.

### **Background**

- 1.6 In July 2012, the three councils adopted the Central Lancashire Core Strategy which sets out the strategic planning policies for Central Lancashire and which is supported by the individual local plans, produced by each respective Council in 2015.
- 1.7 In 2018, a review of the Core Strategy and individual local plans was begun with a view to delivering a single CLLP, reflecting both the shared strategic policy objectives and more detailed non-strategic policies. Work completed by the Central Lancashire Team, to date, includes multiple Call for Sites exercises between the three Councils and an updated Local Development Scheme and consultation on the Issues and Options and Preferred Options Stage 1 Documents.
- 1.8 The Central Lancashire Strategic Housing and Employment Land Availability Assessment (SHELAA) (October 2021), sets out the procedures which will be followed when assessing the sites submitted, for various uses in Call for Sites. The SHELAA methodology will be followed by the three councils to identify suitable, available and deliverable sites for consultation in the CLLP.
- 1.9 The Preferred Options document was completed in December 2022 and was consulted on over December 2022 to February 2023. The consultation was supported by an integrated assessment of the preferred sites and Policies Maps for each Council presented at both District and Ward level. The Councils are now in the process of reviewing all the comments received in this consultation and continuing with site assessments as progress towards a Preferred Options Stage 2 Consultation of a Draft Plan. This Central Lancashire Employment Land Study – Land Supply Update will support the site assessment process and provide evidence to inform the CLLP more generally.

### **Methodology**

- 1.10 Research methods used include e-meeting and telephone interviews with property market stakeholders such as developers, investors and their agents. The status and deliverability of potential future employment sites, put forward for inclusion in the CLLP,

was reviewed in detail, compared to changes in local and national property markets since 2021.

1.11 ***The Study has also undertaken an updated OAN forecast exercise to calculate need in Central Lancashire over the amended CLLP period 2023-2041. It should be noted that this OAN exercise uses a substantially revised forecast methodology to that completed in previous ELS Studies, blending Labour Demand and Take Up based modelling. The reasons for this change in approach are:***

- ***To reflect changing best practice in how to complete OAN exercises for employment land***
- ***To best reflect the latest National Planning Policy Framework and Planning Practice Guidance***
- ***To provide a stronger link between forecast jobs change, which will inform other elements of the CLLP such as housing needs, and identified employment land OAN, while recognising some of the issues with translating jobs need directly into an employment land requirement***
- ***To provide a more nuanced and finer grain analysis more generally***
- ***To reflect the recent precedents and outcomes of recent North West Local Plan Examinations in Public, which BE Group has participated in.***

1.12 ***One result of this change is that the OAN figures produced here will not be directly comparable with those in the Central Lancashire ELS Studies of 2017, 2019 and 2022.***

1.13 Finally, the OAN has been compared to the latest population projections for Central Lancashire, to understand how economic growth links to population change in the sub-region.

1.14 Attached at Appendix 1 is a list of all consultees.

### **Summary of the 2022 Central Lancashire Employment Land Study**

1.15 In 2021-2022, BE Group was commissioned to complete an Employment Land Study for the Central Lancashire sub-region and its component local authority areas of Preston, Chorley and South Ribble. It provided an Update of the Central Lancashire ELS, produced in 2017 by BE Group.

- 1.16 In addition to a review of the sub-regional and local property markets, which is partially updated in this Study, the 2022 ELS provided a comparison of realistic employment land supply against identified Objectively Assessed Needs (OAN) for land to 2038. In terms of the employment land supply, as of October 2021, the realistic employment land supply for Central Lancashire was identified as 190.78 ha, comprising:
- Chorley: 56.28 ha – Reflecting improved development prospects at Botany Bay and around Junction 8, M61 more generally
  - Preston: 82.52 ha – Comprising 71.31 ha in EP1 allocations and another 11.21 ha in the ELR sites specifically assessed for that Study, which could provide further growth options
  - South Ribble: 51.98 ha – Reflecting improved development prospects at locations including E1(g): Farington Hall Estate.
- 1.17 South Ribble contains two further strategic land allocations – the 65 ha Cuerden Strategic Site and the 72 ha Samlesbury Enterprise Zone. At the Cuerden Strategic Site (Lancashire Central), previous plans for development had been discarded and Lancashire County Council was working with developer partner Maple Grove to produce a new masterplan for the site. The site now has Outline planning consent (App. No. LCC/2022/0044) for a mixed use scheme. The Samlesbury Enterprise Zone had then been in operation for around a decade and has now seen several high value developments in areas such as defence logistics, asset management and skills development.
- 1.18 Against this supply the ELS identified OAN requirements, for the Local Plan period 2021-2038, ranging from a shortfall of 25.68 ha in South Ribble to a surplus of 77.79 ha in Preston (see Table 1). Forecasting was based around two models of OAN, the forward projection of historic take up and a labour demand model based on jobs forecasts.

**Table 1 – Central Lancashire Land Study 2022 Forecast Models – Summary**

Local Authority	Model	A: Land Stock 2016, ha – Strategic and/or Local Supply*	B: Land Need 2021-2038, ha	C: Buffer (five years further need), ha	D: Surplus (Shortfall), ha <i>D=A-(B+C)</i>	Assumptions
Chorley	Local Take Up	56.28 ha of Local Supply	58.99	17.35	(20.06)	Based on historic (30 years) take-up of 3.47 ha/pa. Compares a local growth rate with a local only supply picture
	Employment based on adjusted stock	56.28 ha of Local Supply	Growth: +6.4 Change: +2.7	+1.78 +0.75	1) 48.10 2) 54.33	Based on 1) projected growth sectors 2) projected employment change across sectors
Preston	Local Take Up	82.52 ha of Local Supply (with ELR Sites)	54.91	16.15	11.46	Based on historic (28 years) take-up of 3.23 ha/pa. Compares a local growth rate with a local only supply picture
	Employment based on adjusted stock	82.52 ha of Local Supply (with ELR Sites)	Growth: +7.9 Change: +3.7	+2.19 +1.03	1) 72.43 2) 77.79	Based on 1) projected growth sectors 2) projected employment change across sectors
South Ribble	Local Take Up	51.98 ha of Local Supply	60.01	17.65	(25.68)	Based on historic (30 years) take-up of 3.53 ha/pa. Compares a local growth rate with a local only supply picture
	Employment based on adjusted stock	51.98 ha of Local Supply	Growth: +7.8 Change: +4.2	+2.17 +1.17	1) 42.01 2) 46.61	Based on 1) projected growth sectors 2) projected employment change across sectors

Source: BE Group, 2021

1.19 The first method, the forward projection of historic land take up trends, showed that Central Lancashire needs 225.06 ha of land, inclusive of a five-year buffer. By local authority area, this comprises:

- Chorley – 76.34 ha
- Preston – 71.06 ha
- South Ribble – 77.66 ha.

- 1.20 Against the realistic employment land supply of Central Lancashire, there were shortfalls in Chorley and South Ribble, but not Preston:
- Chorley – **20.06 ha (further need)**
  - Preston – **-11.46 ha (surplus land). Minus 11.21 ha of ELR sites gives a surplus of 0.25 ha**
  - South Ribble – **25.68 ha (further need).**
- 1.21 The second method looked at jobs growth, as identified in Cambridge Econometrics forecast modelling. As Table 1 shows, all three local authorities had a surplus of land to 2038, under this model.
- 1.22 However, the market assessment, the impacts of the Covid-19 Pandemic on jobs densities and a review of the historic trends in employment change and land take up suggested that these forecasts underestimate land needs significantly. **The preferred forecasting method was therefore a projection forward of past take-up rates.** This highlighted that Chorley requires a further 20.06 ha to 2038 and South Ribble a further 25.68 ha. Preston had a modest supply surplus of 0.25-11.46 ha.
- 1.23 To meet such further needs it was recommended that Chorley look for opportunities around the M61 Corridor and Buckshaw Village. South Ribble should consider similar opportunities along its strategic road corridors, particularly for B2/B8 premises. In Preston, the small supply surplus could be enhanced with opportunities including ELR 10: Fulwood Barracks and supporting the development of multi-occupancy space in Preston City Centre.

## 2.0 PROPERTY MARKET UPDATE

### Introduction

- 2.1 This Section provides an update on the economy and property market of Central Lancashire, following on from the end of the Covid-19 Pandemic. It considers changes in socio-economic trends and both national, sub-regional and local property markets through market data, enquiries information, and engagement with property market stakeholders.

### Socio-Economic Change Over 2020-2023

#### *Population Change 2021 Census*

- 2.2 Since the 2022 ELS was completed several outputs from the 2021 Census have been published. Most relevant for this Study are the findings on population and homeworking.

#### Population

- 2.3 Comparing the 2021 Census with the previous census (2011) shows that Central Lancashire's population grew by 5.7 percent over the decade from 356,414 in 2011 to 376,604 in 2021. By local authority, the changes were:

- Chorley – 2011: 107,155. **2021: 117,732**
- Preston – 2011: 140,202. **2021: 147,835**
- South Ribble – 2011: 109,057. **2021: 111,035.**

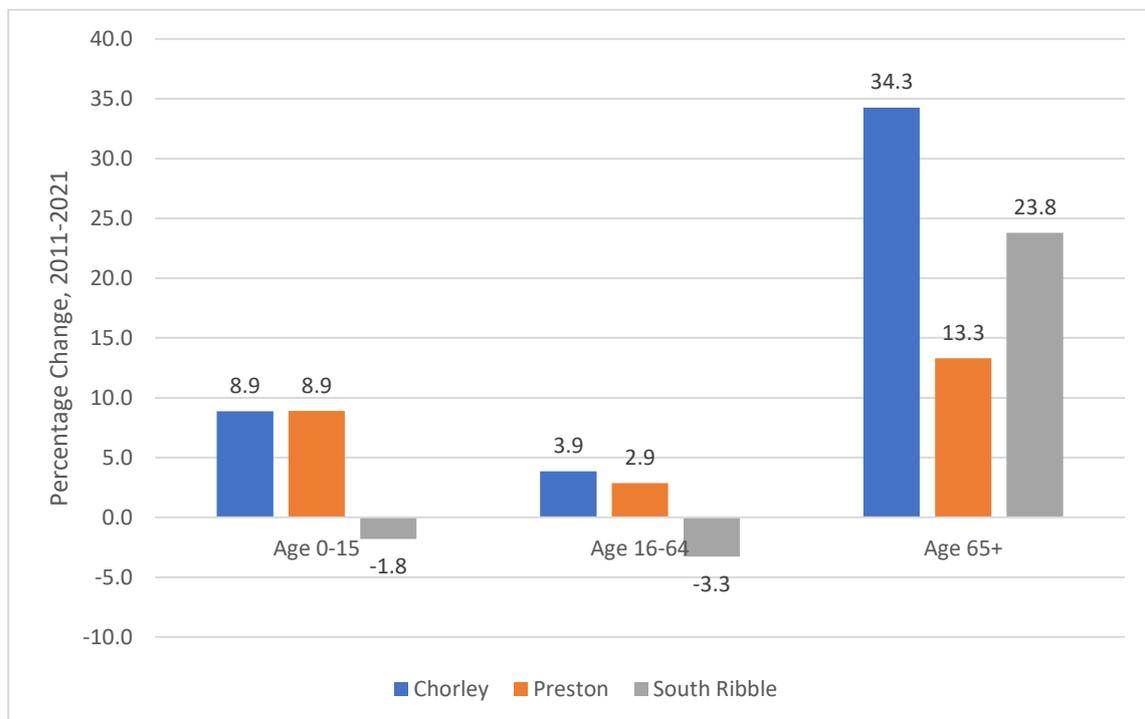
- 2.4 Over 2011-2021 the largest population growth was recorded in Chorley, a gain of 10,577 people or a 9.9 percent increase. Preston saw the second highest growth, a gain of 5.4 percent or 7,633 people. South Ribble gained a more modest 1,978 people or a 1.8 percent change.

- 2.5 As of 2021, 62.8 percent of Central Lancashire's population, 236,589 people, was working age (16-64 years old). Preston had the highest proportion at 65.5 percent (96,865), followed by Chorley at 61.4 percent (72,250) and South Ribble at 60.8 percent (67,474). This can be compared to North West and English working age population proportions of 65.8-64.1 percent.

- 2.6 Central Lancashire's working age population 16-64 grew from 233,497 in 2011 to

236,589 in 2021, equating to a modest growth of only 1.3 percent or 3,092 people over the period. Figure 1 shows the percentage change of different age segments over 2011-2021, for the three local authorities. Overall, Chorley and Preston saw gains in their working age populations – 3.9 percent and 2.9 percent respectively – or around 2,680 additional people each. These rates of working age growth are generally better than the equivalent North West and, to a lesser degree English, rates of working age population growth – 1.9 percent and 3.6 percent respectively. South Ribble however, lost working age people over the same period, a reduction of 2,277 people or 3.3 percent.

**Figure 1 – Population Change 2011-2021, Percentage Change**

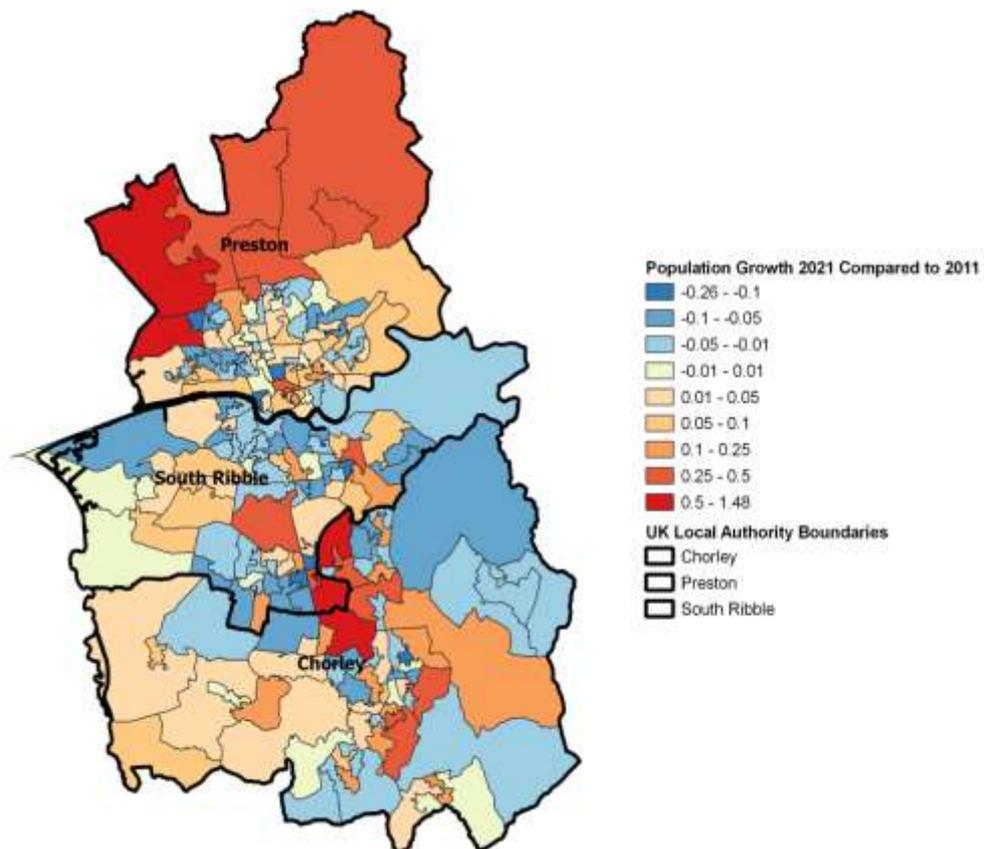


Source: Census, 2011 and 2021

2.7 By far the largest growth was in the 65 plus population, however. As Figure 1 shows, this population group increased by around a third in Chorley (6,156), around a quarter in South Ribble (4,620) and by 13.3 percent in Preston (2,560). For Preston this growth in the 65 plus cohort was below the proportions of North West and English change, 18.3 percent and 19.9 percent respectively. South Ribble and particularly Chorley clearly saw an above average growth in their older population. The somewhat younger demographics in Preston will likely partly reflect the presence of higher and further education facilities in the city, as well as the fact that cities can be more attractive to younger people more generally, due to the lifestyle they offer.

2.8 Figure 2 shows where total population growth was concentrated spatially in Central Lancashire over 2011-2021. It can be seen that the growth in population has been focused around two broad areas, the north west of Preston and in, and around, Buckshaw Village and Clayton-Le-Woods, in Chorley and South Ribble. This was unsurprising as both locations have been a focus for housing development over the last decade. Secondary growth areas include the rural north of Preston district, Farington/Farington Moss in South Ribble and southern parts of Chorley Town.

**Figure 2 – Percentage Population Growth, all age groups, 2011 – 2021 (2011 LSOA Boundaries)**



Source: Census, 2011 and 2021

2.9 Areas of population decline were dispersed, but include concentrations in the Cottam, Lea and Ashton areas in the west of Preston city, the Frenchwood area in the south and multiple locations in the east. In South Ribble, much of Penwortham, some parts of Bamber Bridge and southern parts of Leyland/Moss Side have lost population since 2011, as have rural areas in the north west and east of the Borough. In Chorley

Borough, rural areas in the east, north and south have lost population, as have some parts of Euxton.

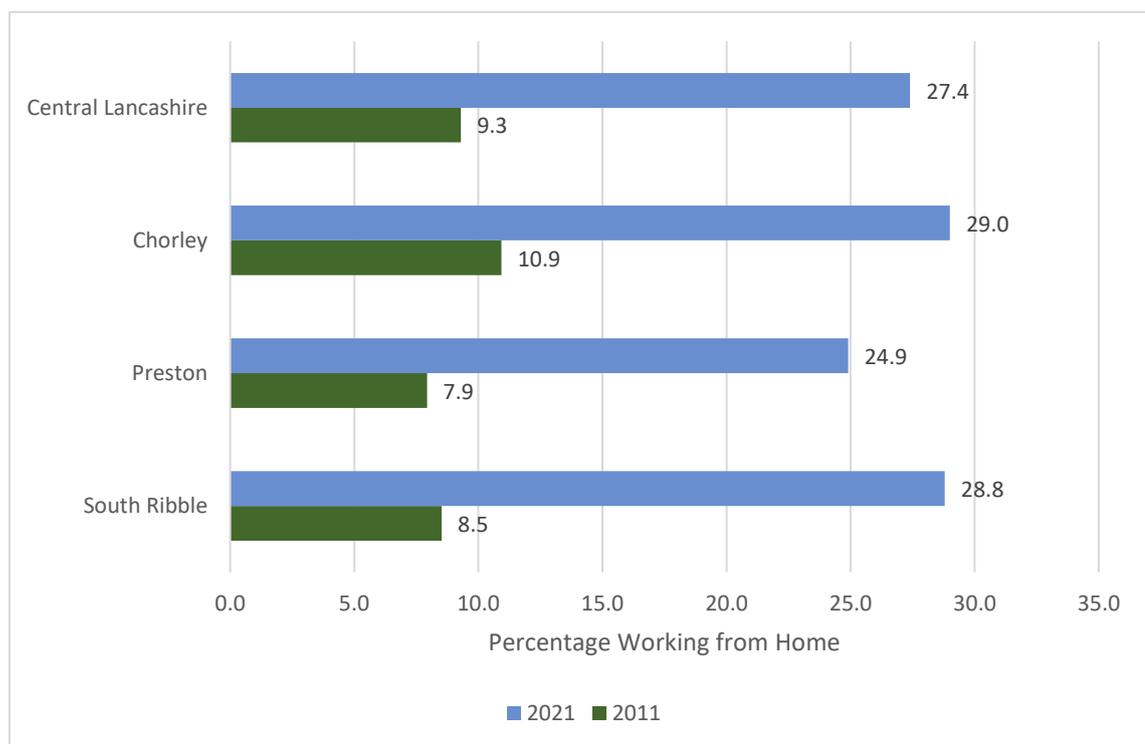
### **Homeworking**

- 2.10 Between October to December 2019 and January to March 2022, homeworking in the UK more than doubled from 4.7 million to 9.9 million people. In the North West, the proportion working from home increased from 12 percent to 26.7 percent over the same period. This change initially reflected the work from home restrictions which were put in place over 2020/2021 to combat the Covid-19 Pandemic. However, despite the end of UK government guidance to work from home, in February 2022 more than eight in ten workers who had to work from home during the Pandemic said they planned to work both from home and in the workplace (hybrid work). Of those workers surveyed, 42 percent were planning to work "*most working hours from home, and sometimes from their usual place of work*" (Source: Homeworking in the UK – regional patterns: 2019 to 2022, ONS (2022)).
- 2.11 Homeworking, and particularly hybrid working appears here to stay with particular impacts on market demand for offices, as most business sectors where remote working is an option will be office based. Experience since 2021 suggests that hybrid working practices encourage larger firms to look to consolidate space, reducing their overall occupancy. Generally, lower grade secondary office space will be sacrificed against higher grade options, leading to increased stock surpluses. Conversely, demand for smaller serviced suites, in business centres, etc. has increased as such suites can be let on flexible terms and be responsive to businesses growing or reducing space needs. Business centres can also offer temporary space options such as Hot Desking which particularly suit hybrid workers.
- 2.12 Homeworking at the local authority and sub-regional level can be measured through the 2021 Census. The 2021 Census took place during the Covid-19 Pandemic when work from home restrictions were still in place although, as noted above, the majority of those who worked from home in 2020-2021 continue to express an interest in at least hybrid working. Overall, 48,925 residents of Central Lancashire aged over 16 worked from home in 2021, 27.4 percent of that population. This compared to a homeworking rate of only 9.0 percent in 2011.
- 2.13 At 27.4 percent, the homeworking rate in Central Lancashire largely reflected the North

West rate which, as of the Census, was 27.3 percent. It was slightly below the English 2021 average of 31.5 percent.

2.14 As Figure 3 shows, homeworking rates were around three times higher in 2021 than in 2011 in all three local authorities, with greater proportions of homeworking in Chorley and South Ribble. Thus, however exaggerated these figures were by the circumstances of 2021, homeworking clearly has a greater role in the economy of the sub-region than was the case in 2011.

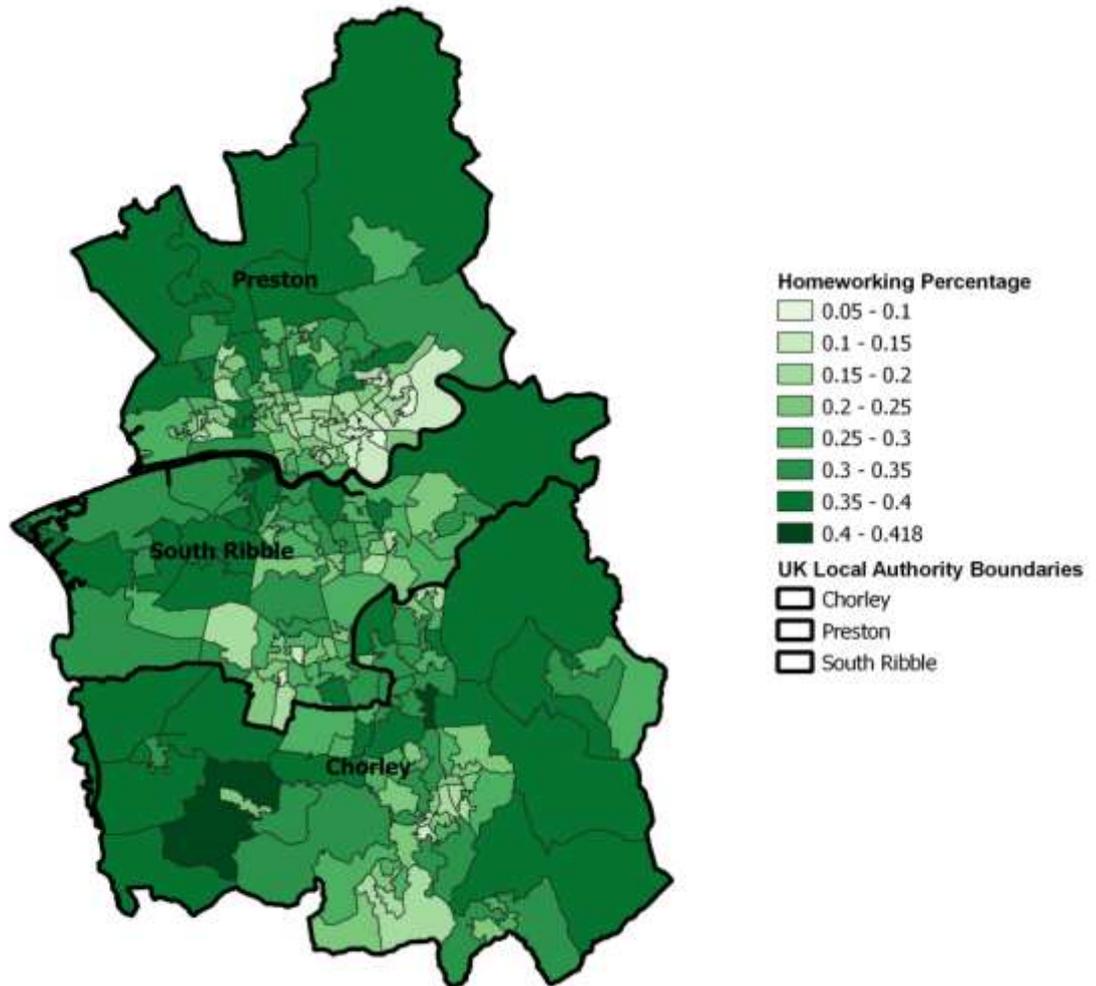
**Figure 3 – Homeworking Rates in 2011 and 2021, Percentage of 16+ Population**



Source: Census, 2011 and 2021

2.15 Figure 4 maps the share of people that mainly worked from home in each LSOA. Overall, rural and suburban areas show higher homeworking rates than urban areas, something most evident in Preston. It was also seen in South Ribble although the area with the highest homeworking proportion was in the north of Penwortham, by the river Ribble. In Chorley, homeworking was again highest in the rural west of the Borough, most notably the area surrounding Eccleston, and the rural east, with another peak in Whittle-Le-Woods. The areas of high homeworking are also areas of relatively high affluence in Central Lancashire, as people in higher paying office and service sector jobs will be best able to work from home.

Figure 4 – Percentage Working from Home 2021 (2021 LSOA Boundaries)



Source: Census, 2021

### **Macro-Economic Issues**

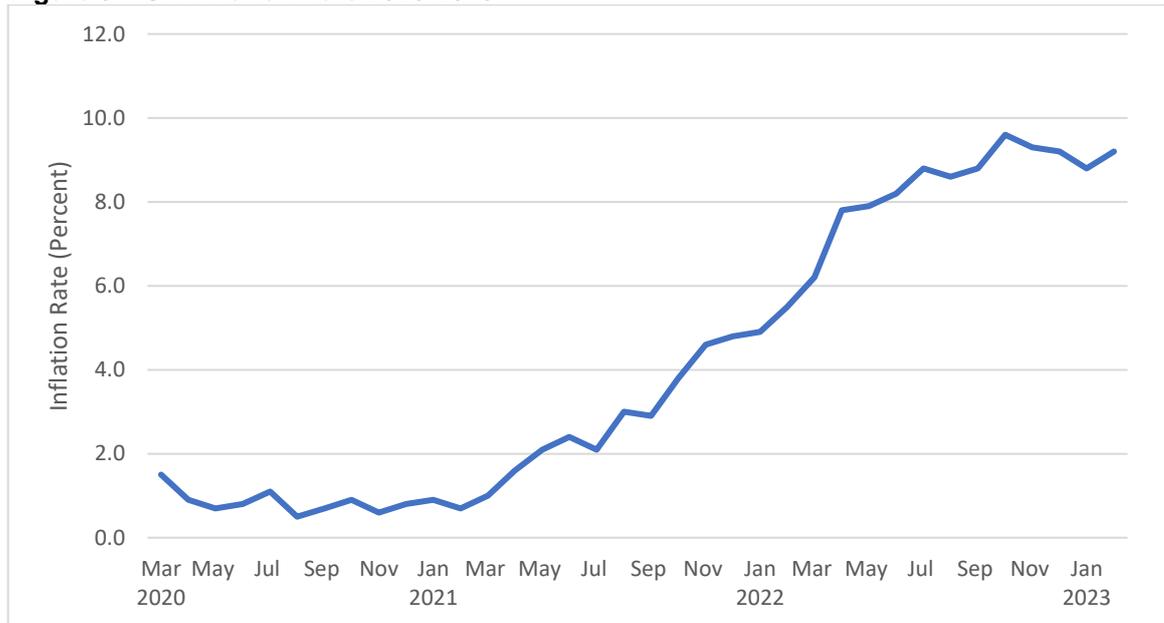
2.16 At the time the Central Lancashire ELS was commenced in summer 2021, the Covid-19 Pandemic was ongoing with the Coronavirus Job Retention Scheme (furlough scheme) continuing to protect jobs in areas of the economy that had been, and continued to be, closed during periods of national lockdown. Some two years later the medium-to-long term impacts of the Covid-19 Pandemic are beginning to be realised, and these are considered here.

### *Inflation and GDP Change*

2.17 In 2021, 2022, and on into 2023, increasing rates of inflation have been a national concern. A multitude of factors, including the economic measures implemented during the Covid-19 Pandemic and the Ukraine conflict, have resulted in record high rates of inflation measured in the last two and a half years. The Office of National Statistics

(ONS) keeps a monthly record of the inflation rate in the UK using the Consumer Prices Index, including owner occupiers' housing costs (CPIH). Figure 5 shows the change in the inflation rate from the onset of the Covid-19 Pandemic up until February 2023, with sharp rises from around March 2021, peaking at 9.6 percent in October 2022. Since that peak, inflation has reduced marginally, standing at 9.2 percent as of February 2023.

**Figure 5 – UK Inflation Rate 2020-2023**

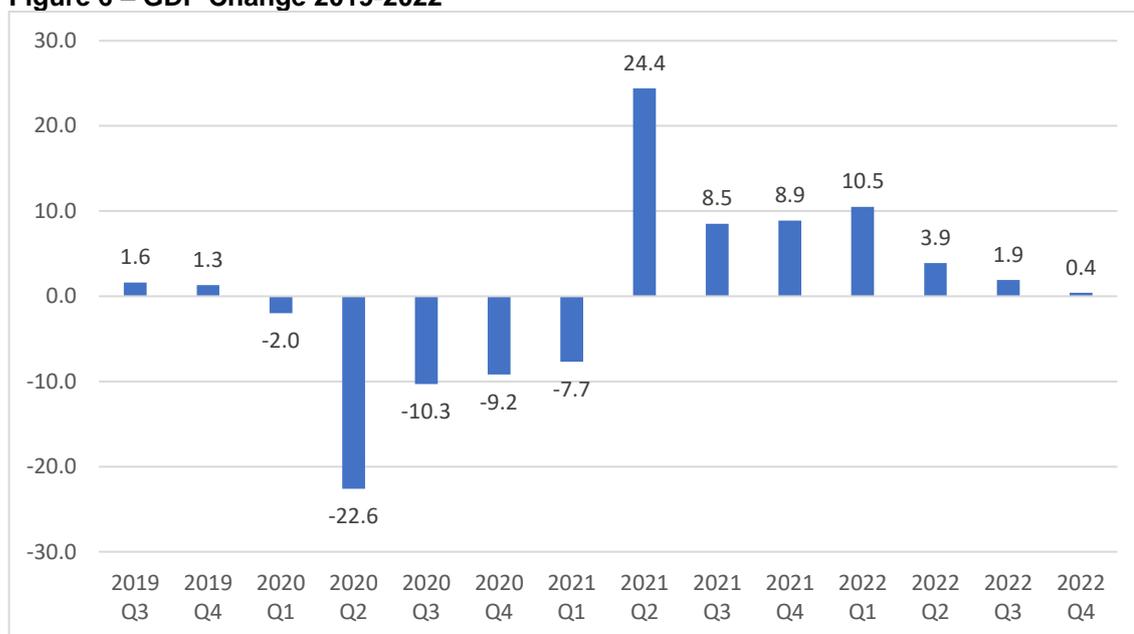


Source: CPIH, 2023

- 2.18 Quickly rising prices will reduce the purchasing power and disposable incomes of consumers and thus reduce saving capabilities. Relevant impacts will include reduced purchases of goods and services, impacting on the retail, leisure, wholesale and manufacturing sectors. Additionally, inflation is increasing construction costs which can impact on development viability while any growth in interest rates, undertaken to mitigate inflation, will increase the costs of commercial development finance.
- 2.19 All of these factors may serve to limit development in Central Lancashire, although only in the short term. As noted, figures show some decrease in inflation in Quarter (Q) 1 of 2023 with the Bank of England predicting a sharp decline in inflation rates over the rest of 2023. Inflation is projected to reduce to 3.0 percent by Q1 2024 and 1.0 percent by Q1 2025.
- 2.20 Another measure of the economic health of the UK is in its quarterly Gross Domestic Product (GDP) change. Figure 6 illustrates GDP change from Q3 of 2019 to Q4 of 2022. It shows the impacts of the Covid-19 Pandemic in 2020, with GDP in Q2 2020

being -22.6 percent as large parts of the economy locked down to control the spread of Covid-19. GDP remained suppressed until Q2 2021 when a big rebound in economic activity, to +24.4 percent was noted. GDP growth was more muted in 2022, with each quarter lower than the last and Q4 2022 recording only 0.4 percent growth.

**Figure 6 – GDP Change 2019-2022**



Source: ONS, 2023

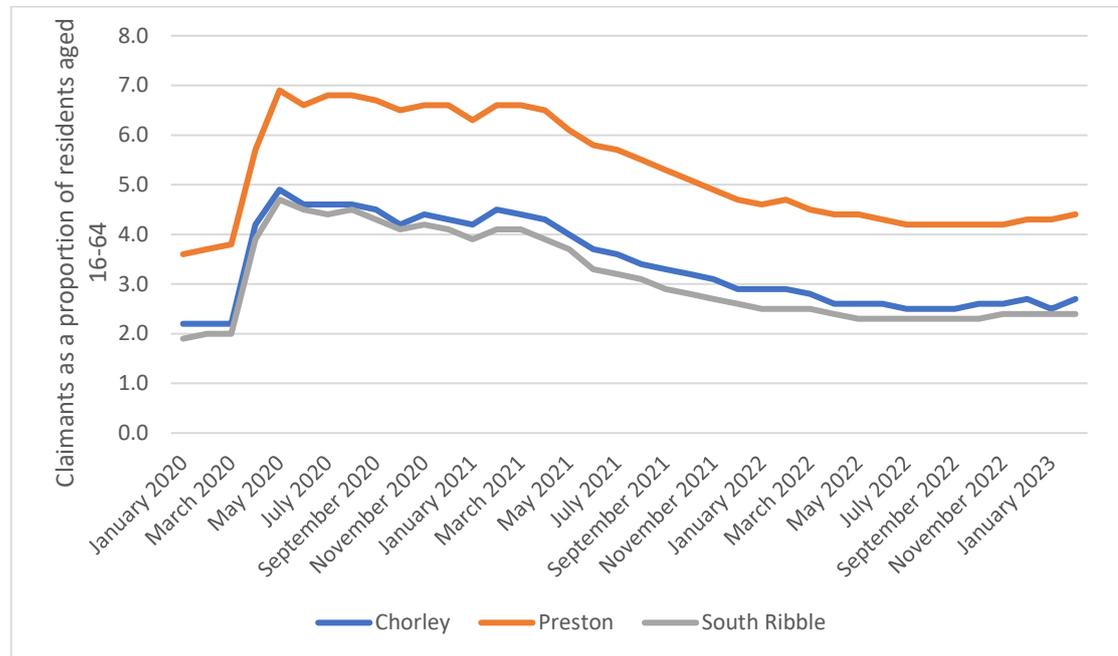
- 2.21 Moving forward, recent International Monetary Fund (IMF) reports on G7 growth suggest that the British economy would shrink by 0.6 percent in 2023. The UK is the only G7 economy projected to see negative economic growth. This is a result of reduced UK household spending due to increased taxes, high energy prices and rising mortgage and other household costs, which outstrip wage increases.
- 2.22 However, if the impacts of inflation do continue to reduce in 2023/2024 it does at least allow for the possibility of a more rapid economic recovery from 2024 onwards.

*Sub-Regional Employment Impacts*

- 2.23 As Figure 7 shows, the proportion of people claiming out of work benefits more than doubled in Chorley and South Ribble, and nearly doubled in Preston, between March and May 2020. May 2020 saw a peak of claimant counts at 4.7 percent, 4.9 percent and 6.9 percent of all residents aged 16-64, in South Ribble, Chorley and Preston respectively. However, claimant rates in Chorley and South Ribble remained below wider averages of 6.1-7.1 percent, across Lancashire, Great Britain and the North

West, in May 2020.

**Figure 7 – Claimant Counts as a Proportion of Residents Aged 16-64**

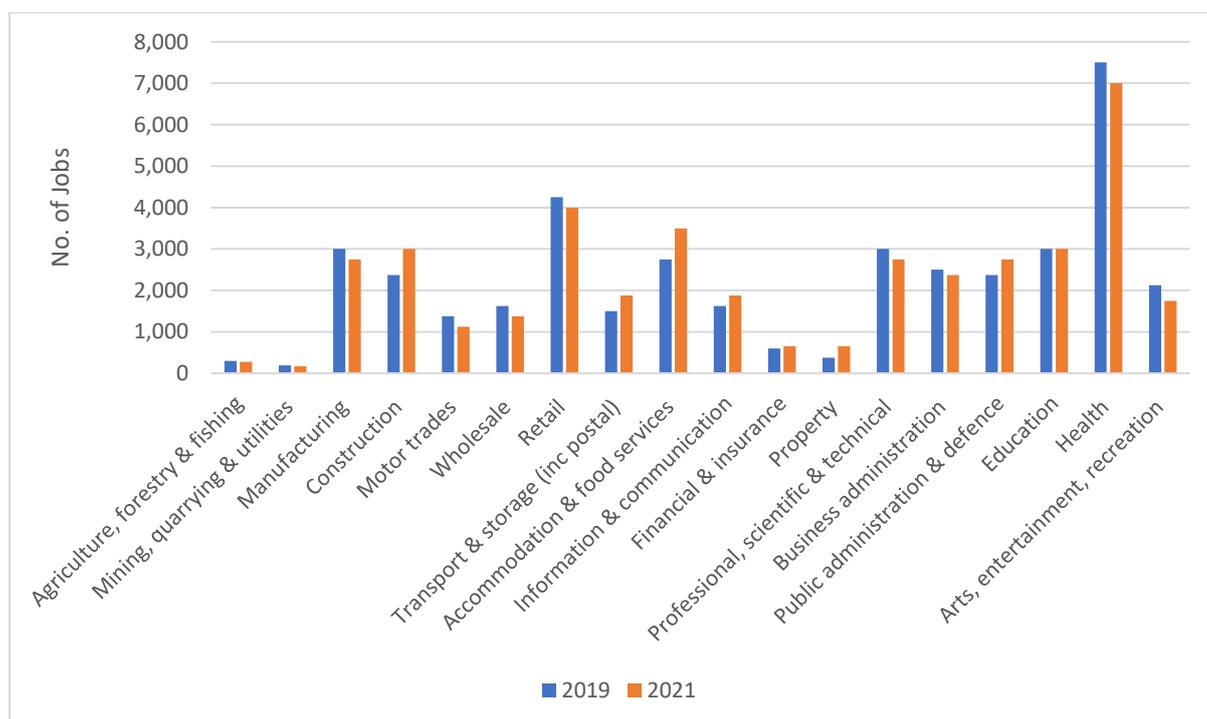


Source: ONS, 2023

- 2.24 Claimant rates remained high, with some modest fluctuation, in all three authorities until March 2021 when a slow but steady began and continued until September 2022 when claimant rates had reduced to 2.3 percent, 2.5 percent and 4.2 percent in South Ribble, Chorley and Preston. This can be compared to wider averages of 3.4-4.1 percent across the county, country, and region, in the same month.
- 2.25 Since September 2022, all three local authority areas have seen a modest percentage increase, reaching 2.4 percent in South Ribble, 2.7 percent in Chorley and 4.4 percent in Preston as of February 2023. This represents an increase in claimant rates on autumn 2022 but a modest change compared to what occurred in spring 2020.
- 2.26 This data suggests that all three local authority areas were significantly impacted by the lockdowns and saw an increase in unemployment in 2020-2021. However, in the case of Chorley and South Ribble the increase in unemployment was well below wider averages. In the case of Preston, the increase was broadly in line with wider increases. Since then, claimant rates have decreased significantly, to a low point in September 2022, again reflecting wider change, with only a modest upturn in unemployment moving into 2023.

2.27 To understand further how employment patterns in Central Lancashire have been changed by the Covid-19 Pandemic, Figures 8 to 10 compare Business Register and Employment Survey (BRES) data, by sector, for the years 2019 (i.e., pre Pandemic) and 2021 (the most recent data available), for each local authority area. It should be noted that BRES data represents a sample survey of local employment, rounded up, and accordingly subject to errors. Figures in this section should thus be taken to represent broad trends only.

**Figure 8 – Jobs Change 2019-2021 – Chorley**



Source: BRES, 2023

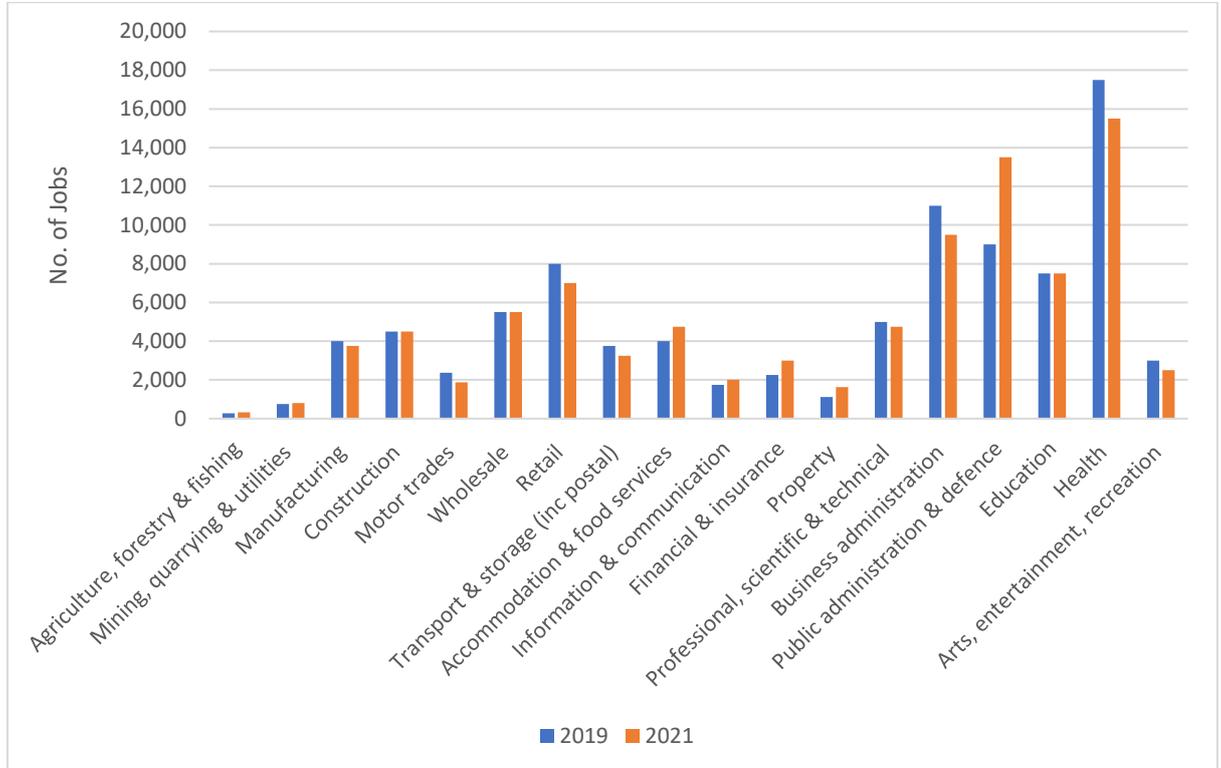
2.28 Chorley gained 405 jobs overall between 2019 and 2021, increasing to 40,870. The biggest increase was in Construction which gained 625 jobs, to 3,000 in 2021. Financial and insurance and Property added 50 jobs each, ICT 150. The latter will, in part at least, reflect the opening of the Strawberry Fields Digital Hub over that period. Private office sectors employed 8,300 locally by 2021. Public administration also gained 375 by 2021 to 2,750, while Transport and storage gained 350 to 1,870.

2.29 Again, the Health sector recorded a reduction of 500 jobs, to 7,000 in 2021.

2.30 Losses were more dispersed than was the case in Preston, with the biggest declines being in Arts and entertainment (a 425 jobs reduction to 1,750), Retail (a 250 jobs

reduction, to 4,000), Manufacturing (a 250 jobs reduction to 2,750) and Motor Trade (a 250 job reduction to 1,125).

**Figure 9 – Jobs Change 2019-2021 – Preston**

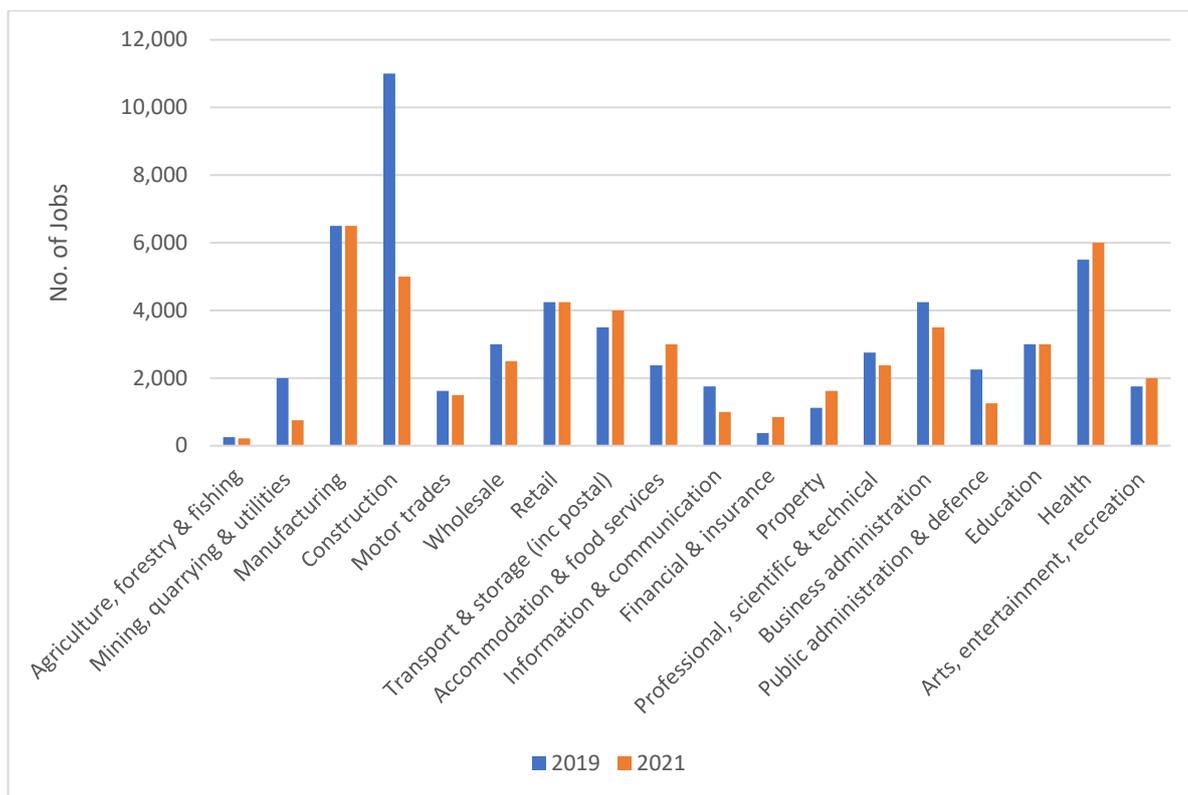


Source: BRES, 2023

- 2.31 Preston gained 350 jobs overall between 2019 and 2021, reaching 91,625 jobs in 2021. Perhaps surprisingly, given lockdowns over the intervening period, the best growth was in office-based sectors, notably Financial and insurance (750 extra jobs), Property (500 extra jobs) and ICT (250 extra jobs). Overall, 20,875 were employed in private office sectors in the city in 2021. Public administration also gained a substantial 4,500 jobs over the period, increasing to 13,500 by 2021. It is not clear what this big public sector jobs gain relates to and what element of the jobs growth is permanent and what element might have resulted from different agencies taking on staff during the Pandemic.
- 2.32 Gains in these office sectors were partially offset by a reduction of 1,500 jobs in Business administration, to 9,500. Less surprisingly given the multiple lockdowns which occurred over 2020-2021, retail lost 1,000 jobs, the Motor trade lost 700 and Arts and entertainment 500. Manufacturing lost 250 jobs to 3,750 and Transportation 500 jobs to 3,250.

- 2.33 Given the health crisis occurring over this period, another surprising employment reduction was in Heath, which had 2,000 less jobs in 2021 than in 2019. Some of this change will reflect ongoing rationalisation at Royal Preston Hospital and other local clinics however, unrelated to the Covid-19 Pandemic. Some of this could also result from general recruitment and retention difficulties nationally in the NHS and care sectors.
- 2.34 In contrast to Chorley and Preston, South Ribble recorded a sizable reduction in total jobs a loss of 7,930 jobs over 2019-2021 to 49,320. This was driven by a loss of 6,000 jobs in Construction, to 5,000 in 2021. It is not clear what is behind this significant recalculation of Construction employment locally. Certainly, some jobs have been lost nationally over the Covid-19 Pandemic period, as projects were put on hold, slowed down or were cancelled in the face of economic and practical uncertainties. However, an equivalent impact is not visible in Chorley or Preston.
- 2.35 A reduction of 1,250 jobs, to 750, was also recorded in the Mining and quarrying sector, while public administration lost 1,000 jobs to 1,250 in 2021.
- 2.36 Other losses, of 500 or more, were recorded in Business administration (a reduction of 750 jobs to 3,500), ICT (a reduction of 750 jobs to 1,000) and Wholesale (a reduction of 500 jobs to 2,500).
- 2.37 Losses were partially offset by growth in the office-based sectors of Financial and insurance (a gain of 475 jobs to 850) and Property (a gain of 500 jobs to 1,625). Overall, 9,350 were employed in private office sectors by 2021. Transport and storage gained 500 jobs, to 4,000 in 2021. Transportation jobs were also gained in Chorley, but not Preston, reflecting the more general growth in logistics in this period, driven by a booming e-commerce sector and changing supply chain practices in businesses.

**Figure 10 – Jobs Change 2019-2021 – South Ribble**



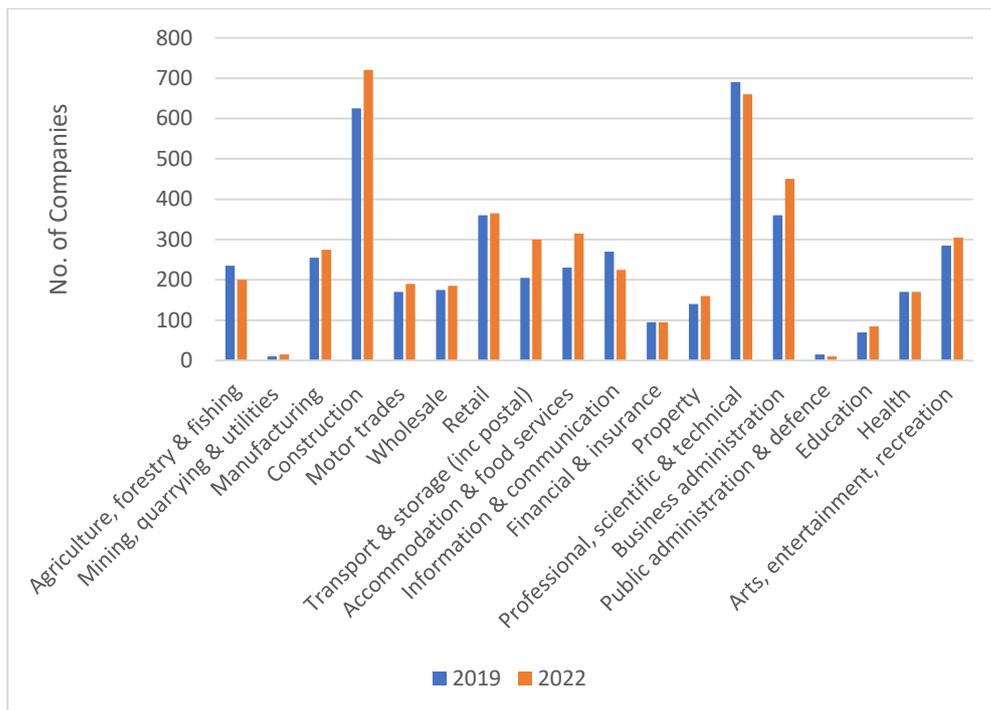
Source: BRES, 2023

- 2.38 In contrast to Preston and Chorley, South Ribble saw a net gain in Health sector jobs, and extra 500 to 6,000 in 2021, likely reflecting increasing demand for worker in local care activities, both before and during the Covid-19 Pandemic. No change was recorded in local Manufacturing employment which remained at 6,500.
- 2.39 Despite the lockdowns, several office sectors continued to see growth, most notably Financial services, Property and, South Ribble excepted, ICT. This growth has been somewhat offset by reductions in employment in the more general office sectors of Professional and Business services, however.
- 2.40 Reflecting forecasts of jobs change discussed in the 2017 and 2022 ELS, employment in Manufacturing declined in Preston and Chorley, with no change recorded in South Ribble. Transport and storage saw employment gains in Chorley and South Ribble, but not in Preston. Of the sectors relevant to employment land, Construction seems to have been the most volatile with a gain of jobs in Chorley, no change in Preston and a sizable loss in South Ribble.

*Sub-Regional Business Numbers Change*

- 2.41 Alongside changes in jobs numbers, noted above, UK Business Count data shows changes in local business numbers, by sector, for Preston, Chorley and South Ribble (see Figures 11 to 13). In this case the data is for 2019 and 2022.
- 2.42 Overall, Chorley gained 265 businesses over 2019-2022, to 4,725. As in Preston good growth was recorded in Transport and storage (95 extra firms to 300) and Construction (95 extra firms to 720). The Borough also gained 90 extra firms in Business administration, to 450 along with 20 Manufacturing firms, to 275.
- 2.43 The worst losses were again in private office sectors, in this case ICT (45 less firms to 225), surprising given the jobs growth noted previously and the specialist Strawberry Fields business centre which opened during this period, and Professional services (30 less firms to 660). The figures may not capture all those self employed though and may thus miss out on some growth.

**Figure 11 - Business Numbers 2019-2022 – Chorley**



Source: UK Business Counts, 2023

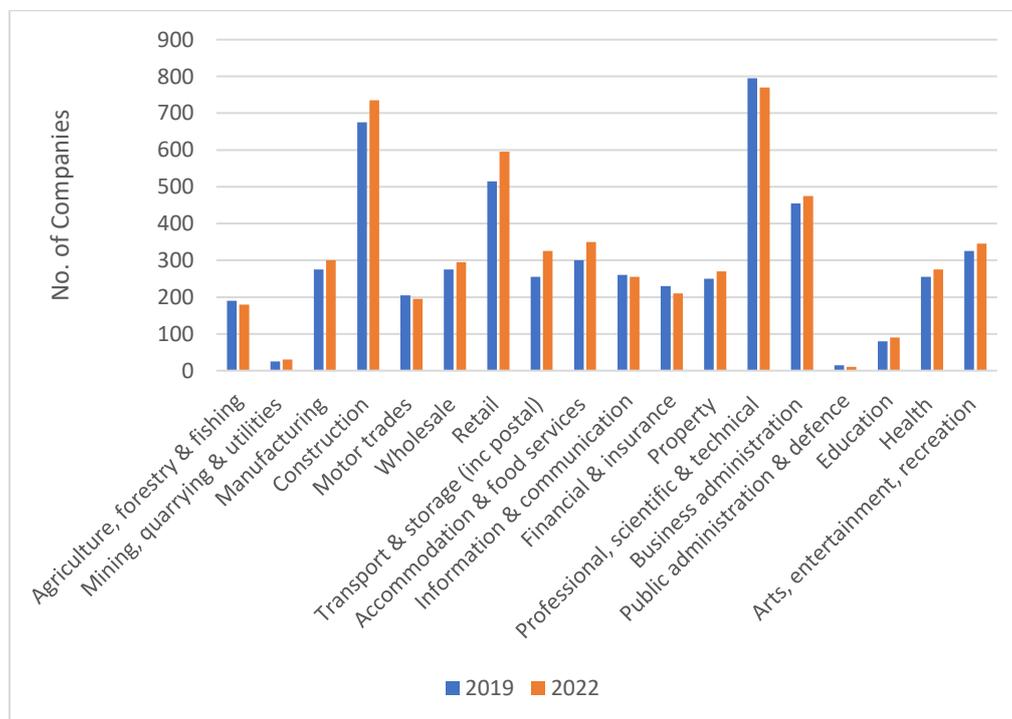
- 2.44 Overall, Preston gained 335 new companies, giving a total of 5,710 by 2022. One surprising point is that the City gained 80 retail businesses over 2019-2022, despite the impacts of the Covid-19 Pandemic on high street trade and a recorded loss of 1,000 jobs over the same period. This suggests most new retail businesses opening

over this period were micro firms or sole traders, making little contribution to jobs numbers.

2.45 Other sectors which saw growth include Transport and storage (70 extra firms to 325) and Construction (60 extra firms to 735). The city also gained 25 manufacturing businesses, to 300 in 2022.

2.46 Losses have been focused in the private office sectors, notably Professional services (25 less firms to 770) and Financial and insurance (20 less firms to 210).

**Figure 12 – Business Numbers 2019-2022 – Preston**

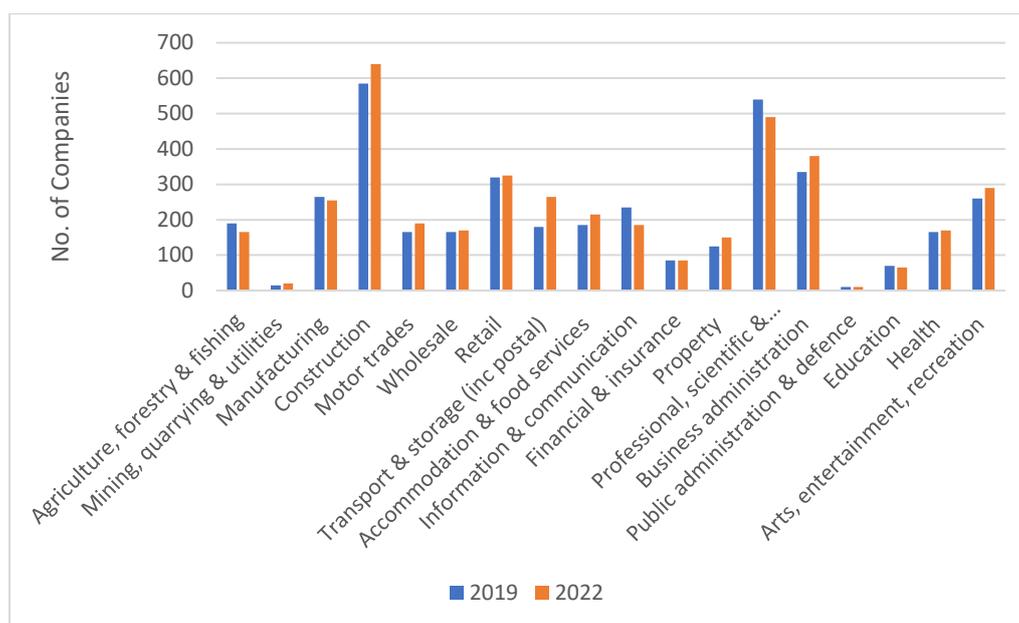


Source: UK Business Counts, 2023

2.47 South Ribble gained 160 businesses in total over 2019-2022, to 4,055. As with Preston and Chorley, some of the best growth was recorded in Transport and storage (85 extra firms to 265) and Construction (55 extra firms to 640), despite the large, recorded decrease in employment in the latter.

2.48 The worst losses were again in private office sectors, in this case ICT (50 less firms to 185) and Professional services (50 less firms to 490). South Ribble also saw a net loss of 10 Manufacturing firms over 2019-2022, to 255.

**Figure 13 – Business Numbers 2019-2022 – South Ribble**



Source: UK Business Counts, 2023

2.49 Comparing recent employment and business number data suggests the following trends:

- Reflecting forecasting, the trend in Manufacturing employment, in Central Lancashire, is broadly negative. However, the sub-region has continued to add manufacturing businesses during recent years. Most of the new firms must be micro in size, employing less than ten staff each, and thus making little impact on jobs numbers
- Notwithstanding the large drop in employment in South Ribble, Central Lancashire saw reasonable overall growth in the Construction sector since 2019, with an increase of 210 new businesses recorded. Again, it is assumed most new firms were micro in size, generating only modest further employment
- Transport and storage has been another growth sector across Central Lancashire, adding companies in all three local authority areas, 250 in total, and jobs in Chorley and South Ribble
- The position in the private office sectors has been mixed in terms of both jobs and businesses. Growth has most consistently been seen in Financial and insurance, Property and, less frequently, ICT. However, this is largely offset by losses in Professional and Business services. Overall, 2019-2021/22 saw a modest net reduction in the private office economy of Preston (10 less businesses and 250 less jobs) and South Ribble (20 less businesses and 900 less jobs). Only Chorley

saw any overall net growth, with a gain of 35 businesses and 200 jobs recorded. Thus, it appears that the events of this period have inhibited growth in the office economy overall, although not necessarily by a large amount

- In terms of the public sector, Public administration has generally added jobs over this period, most notably in Preston, but few new individual organisations are recorded.

### **National and Regional Property Market Trends**

- 2.50 This section considers the national and regional market trends which have emerged from the Covid-19 Pandemic and are likely to continue into the future.

#### ***B2 General Industry***

- 2.51 In spite of some interruptions to operations, from lockdown restrictions, manufacturing businesses boomed over 2020-2021 driven by growing e-commerce. A strong industrial market continued over the first half of 2022 but fell back in the second half in the face of growing economic uncertainties. Despite this 2022 still saw the second highest industrial take up rates on record, after 2021, with 11.5 million sqft (1.07 million sqm) of transactions recorded nationally in Q3 2022 and 10.2 million sqft (948,000 sqm, just over 10 percent of which was in the North West) during Q4 [*Cushman and Wakefield, 2022*].
- 2.52 In spite of ongoing macro-economic uncertainty in 2023, and the risk of a poor economic recovery, if not a recession, in the near future, the industrial market is proving highly resilient. In Central Lancashire, this is evidenced by the recent commencement/completion of several private sector B2/B8 schemes including Botany Bay Business Park in Chorley, units at Preston East and Farington Hall in South Ribble, with further phases of all in the pipeline. Nationally, the industrial market has seen continuing requirements from manufacturers for new build high grade space, both from local firms and larger companies seeking to re-shore and safeguard their supply chains within the UK [*Cushman and Wakefield, 2022*].
- 2.53 Industrial demand is thus projected to remain strong in the short term, even if macro-economic conditions prove worse than forecast. If the economic constraints of 2023 do turn into a prolonged recession this will inevitably inhibit demand although not for the whole plan period – the last major recession limited the property market for some six years, 2008-2013, and was followed by a strong recovery. Additionally, a recession

would not affect all sectors equally. Demand in sectors, such as energy, recycling, food production and medical, producing 'essential' goods is likely to prove durable. In Central Lancashire, the defence aerospace industry, i.e., BAE Systems and its supply chain, which employs over 4,000 locally in core manufacturing processes alone, is expected to benefit from increased national defence spending regardless of wider economic conditions.

- 2.54 If development constraints occur, they are more likely to come from the supply side than the demand side. In 2023 the movement out in yields together with cost inflation is making speculative funding, and thus many development opportunities, unviable, increasing shortages of new build supply. While this is a concern in the short term, decreasing inflation rates and improving access to finance from the second half of 2023 onwards will likely mean that these constraints will not prevent development over the wider Local Plan period. Certainly, stakeholders report that there is a significant amount of investment capital continuing to back the industrial sector due to the ongoing strength of the occupational market which is helping to provide developer confidence amid difficult economic circumstances [*B8 Real Estate, 2023*].

### ***B8 Warehousing***

- 2.55 Demand for logistics premises increased significantly in 2020-2021 in response to the substantial changes in consumer behaviour leading up to and during the lockdowns, including spikes in demand for certain consumer items and increasing use of online retailing. Demand remained strong in 2022. In its '*Big Shed Briefing (January 2023)*' Savills recorded 7.06 million sqft (656,000 sqm) of take up in 2022, in the North West, comprising 24 logistics units of more than 10,000 sqm each. This was 68 percent above the long term annual average in the region with transactions focused on higher grade and 'build to suit' space, of 10,000-20,000 sqm each. The majority of demand came from retailers.
- 2.56 Against this demand, some 2.03 million sqft in seven units was under construction at the start of 2023, in the region. Vacancy rates, although slightly better than in past years, were still very low at 3.83 percent. With around half of the development pipeline under offer before it had been completed, the vacancy rates are unlikely to increase in the short term.
- 2.57 After three years of record breaking take up, stakeholders expect transaction rates in 2023 to be more moderate, but still well above the 10-year average. While reduced

consumer spending may inhibit demand from retailers moving forward, logistics requirements are now coming from an increasingly diverse range of occupiers. Most prominent over the next few years will be third party logistics operators, who serve other businesses. Demand for this service is expected to grow as companies look to outsource more of their supply chain processes in the light of energy price uncertainties, in respect to both power and fuel, fluctuating retail demand and other economic risks [CBRE, 2023].

- 2.58 While logistics growth will continue to be focused on prime locations on the motorway corridors, supply shortages will encourage the take up of good secondary locations as well. In Central Lancashire, all three local authorities have large sites close to motorway junctions including North East Preston; Great Knowley/Botany Bay, Chorley and Cuerden, South Ribble which can benefit from ongoing demand for larger B8 uses.

### **Offices**

- 2.59 During the 2020-2021 lockdowns, office-based firms adjusted to being able to work remotely. Since restrictions ended in early 2022, evidence is that the majority of office-based businesses continue to offer at least hybrid working options to some of their staff, i.e., allowing them to spend some of the working week at home, some in the office. Nationally all employees, who have worked for the same employer for at least 26 weeks, have the legal right to request flexible working, which can include homeworking.
- 2.60 Reflecting this trend towards hybrid working, businesses are increasingly seeking flexibility in their office accommodation, i.e., the ability to increase or decrease the amount of floorspace they occupy with relatively short notice, to meet changing staffing requirements. This new way of working favours serviced offices, co-working spaces and similar models over unserviced options. Serviced business facilities have been one area of growth in 2022, frequently delivered with public sector support, and this is likely to continue into the future.
- 2.61 For larger floorplate offices, the picture is mixed. In the light of changing working practices, established businesses have reviewed their long-term accommodation needs leading to a rationalisation of space with poorer quality accommodation returning to the market, while more modern offices are taken up.
- 2.62 During, and immediately after the Covid-19 Pandemic, there was a view that ongoing

expectations in regard to safety and social distancing would encourage established businesses to seek space outside of dense city and town centres. In Central Lancashire this might benefit business parks in peripheral locations at the expense of Preston City Centre and Chorley Town Centre. In practice, while some such relocations have occurred, there remains plenty to draw companies to urban centres and they continue to be the focus for investment.

2.63 As of January 2023, there was 10.9 million sqft (1.01 million sqm) of office development or refurbishment under construction in the UK, with a possible completion date of this year, much of it in urban areas. 35 percent of this has been pre-let and further good demand is anticipated. Demand will be driven by large occupiers' desire to acquire the very best space to reward returning office workers and fulfil sustainability goals within modern buildings. By comparison, lower grade secondary space (with inadequate parking, low energy efficiency, inadequate natural lighting, insufficient ceiling height requirements to accommodate modern services, lack of air conditioning systems, constrained disabled access, etc.), which doesn't meet the more exacting modern requirements of occupiers, may struggle to let, even in prime city centre locations [CBRE, 2023].

2.64 Macro-economic uncertainty has reduced investment into the office market and pushed out yields in the second half of 2022 and on into 2023. This will impact on viability of some marginal schemes in 2023, but market recovery is anticipated later in the year [Cushman and Wakefield, 2023].

### **Public Sector Enquiries**

2.65 All three of the respective local authorities have collected property enquiries information, through a mixture of telephone contacts with officers and online sources. This information is then collated and analysed using the Evolutive software programme. Enquiries data for the years 2006 to 2020 (back to 2004 in the case of South Ribble) was provided and analysed in Tables 11-13, Pages 60-63 of the Central Lancashire Employment Land Study Update (2022) and Table 2 below provides an update on that data to 2023.

2.66 The Evolutive systems records the size and type of commercial property required for each enquiry received by the Councils but, Evolutive floorspace data is either incomplete or includes exceptionally high figures which are difficult to interpret. Thus, Table 2 below examines the supplied data regarding property type only, although

commentary is provided on the sizes of premises most commonly sought in the industrial and office markets.

**Table 2 – Enquiries 2004/2006-2023 Type**

	Office <sup>1</sup>	Industrial <sup>2</sup>	Storage <sup>3</sup>	Retail <sup>4</sup>	Land <sup>5</sup>	Investment Purchase (Any Type)	Leisure / Tourism	Medical / Clinical	Total
<b>Chorley</b>									
<b>2006-2020</b>	455	884	360	569	84	94	43	27	<b>2,516</b>
<b>2021</b>	44	72	-	53	35	34	1	-	<b>239</b>
<b>2022</b>	35	43	-	32	21	10	10	3	<b>154</b>
<b>2023 Partial</b>	30	54	-	33	37	23	1	1	<b>179</b>
<b>Total</b>	<b>564</b>	<b>1,053</b>	<b>360</b>	<b>687</b>	<b>177</b>	<b>161</b>	<b>55</b>	<b>31</b>	<b>3,088</b>
<b>Percent</b>	<b>18</b>	<b>34</b>	<b>12</b>	<b>22</b>	<b>6</b>	<b>5</b>	<b>2</b>	<b>1</b>	<b>100</b>
<b>Preston</b>									
<b>2006-2020</b>	1,185	2,286	65	1,947	113	220	109	5	<b>5,930</b>
<b>2021</b>	32	71	4	43	2	54	2	-	<b>208</b>
<b>2022</b>	23	43	8	40	3	37	-	1	<b>155</b>
<b>2023 Partial</b>	5	22	6	8	1	12	1	-	<b>55</b>
<b>Total</b>	<b>1,245</b>	<b>2,422</b>	<b>83</b>	<b>2,038</b>	<b>119</b>	<b>323</b>	<b>112</b>	<b>6</b>	<b>6,348</b>
<b>Percent</b>	<b>20</b>	<b>38</b>	<b>1</b>	<b>32</b>	<b>2</b>	<b>5</b>	<b>2</b>	<b>0</b>	<b>100</b>
<b>South Ribble</b>									
<b>2004-2020</b>	1,205	2,468	280	1,177	132	254	153	37	<b>5,706</b>
<b>2021</b>	19	33	14	19	7	7	7	7	<b>99</b>
<b>2022</b>	5	30	10	18	8	5	6	5	<b>58</b>
<b>2023 Partial</b>	15	18	11	11	6	5	5	0	<b>50</b>
<b>Total</b>	<b>1,244</b>	<b>2,549</b>	<b>304</b>	<b>1,207</b>	<b>153</b>	<b>254</b>	<b>153</b>	<b>49</b>	<b>5,913</b>
<b>Percent</b>	<b>21</b>	<b>43</b>	<b>5</b>	<b>20</b>	<b>3</b>	<b>4</b>	<b>3</b>	<b>1</b>	<b>100</b>

Source: CBC, PCC, SRBC, 2023

1. Office – includes Call Centre enquiries, which are recorded separately. Call centre requirements were specifically recorded in 2007, 2008, 2009, 2010, and 2011
2. Industrial – includes Garages (not motor showrooms) which fall within industrial use class and are recorded separately
3. Storage – includes Trade Units, which fall within B8 Use Class which are recorded separately
4. Retail – includes Food Outlets which are separately recorded
5. Land – includes those enquires listed as Yard.

2.67 In Chorley, 3,088 enquiries have been recorded since 2006, an average of 172/year. Against this average, 2021 was an exceptional year in terms of recorded interest, in Chorley, Preston and South Ribble. Requirement rates in 2022 were more modest, but market interest, to date, appears strong again in 2023, at least in Chorley Borough.

- 2.68 Over a third of enquiries were for industrial properties. Almost another third were for retail, 18 percent for offices and some 12 percent for storage or trade units. Other sectors saw only modest market interest. This same broad pattern, in terms of relative levels of interest can be seen in Preston and South Ribble as well.
- 2.69 Most enquiring for industrial and office units sought premises of sub-300 sqm, while less than 10 percent, each, of industrial and office enquiries were for premises of more than 2,300 sqm.
- 2.70 For Preston there were 6,348 property enquiries. As for Chorley and South Ribble, industrial enquiries dominated, followed by retail and offices. 2021 was a particularly strong year for industrial enquiries in the city. The main variation is a lack of interest in local storage space, compared to other parts of Central Lancashire.
- 2.71 Following a strong level of enquiries from 2006 to 2011, enquiry levels declined and in only returned to a about a third of pre-recession levels from 2013 onwards. The 2021 overall enquiries figure was comparable to that in 2019, with 208 enquiries recorded in both years. This suggests a rapid return of demand following the 2020 Pandemic year, for all types of premises, although that interest has trailed off in 2022/2023 as the suppressed requirements of 2020 were met.
- 2.72 In terms of office requirements, 1,245 enquiries were received, largely identical to the number received for South Ribble. This suggests that those seeking office space were enquiring for both Preston and South Ribble, with no particular focus on Preston City Centre.
- 2.73 70 percent of industrial enquiries were for units of less than 900 sqm and 44 percent wanted units of less than 300 sqm. 64 percent of office enquiries were for suites of less than 300 sqm, with most seeking properties of 93-300 sqm.
- 2.74 In the case of South Ribble, for certain categories, including the primary categories of office and industrial, the general level of enquires remained high over 2004-2011 and only reduced in the late recession period of 2012/13. Again 2021 was a relatively strong year although lower than 2019, when 208 requirements were recorded, suggesting a more limited return of demand. Enquiries levels in 2022-2023 have again been modest compared to the past.

2.75 Over 40 percent of all enquiries recorded since 2004 were for industrial premises and more than a fifth were for office premises. In terms of industrial enquiries, while 37 percent of enquiries were for units of 300 sqm or less, it is important to note that market interest has been recorded for units in all size brackets up to 2,300 sqm, although demand for larger units has reduced since 2011.

2.76 Office requirements in South Ribble were generally for small suites, with 47 percent of enquires for sub-100 sqm units. Very large property enquiries, for premises of more than 2,300 sqm are rare and likely to be Central Lancashire-wide. Interest

### Deals

2.77 Transactions of commercial stock in Central Lancashire, sourced from Radius Data Exchange (EGi), have been reviewed to gauge interest in the market and performance levels over the past decade. Not all transactions are recorded, although the available data provides a good indication of types of transactions and market preferences.

2.78 Transaction data gained from LandInsight and conversations with agents have been incorporated into this survey of deals data, so the statistics quoted for previous years, while very similar, are not completely consistent with data quoted in previous reports.

### Industrial

2.79 Table 3 and Figure 14 show that 973 industrial deals occurred across Central Lancashire between 2013 and 2023, with a floor area of approximately 885,000 sqm. The size band of 201-500 sqm saw the highest number of transactions, comprising almost a quarter of all deals.

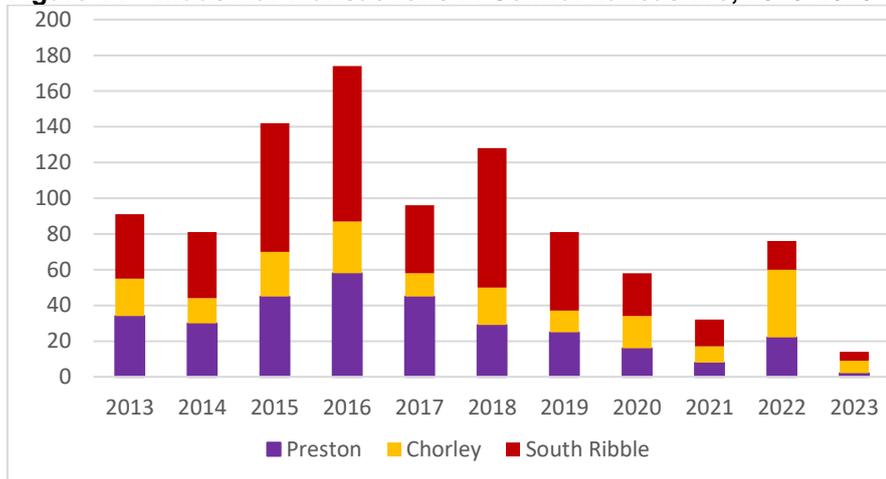
**Table 3 – Summary of Industrial Transactions 2013-2023 by Size Bands**

Area		Size Band (sqm)							Unknown	Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+		
Preston	Floorspace (sqm)	3660	9961	27175	36998	84267	41920	38850	0	242,831
	Total Properties	48	70	81	52	46	7	2	8	314
Chorley	Floorspace (sqm)	2,740	6,054	14,142	26,985	67,869	5,018	52,622	0	175,431
	Total Properties	42	41	45	36	33	1	3	6	207
South Ribble	Floorspace (sqm)	9,232	8,205	36,193	44,137	121,208	62,007	185,760	0	466,743

	Total Properties	131	59	109	64	61	8	9	11	452
Central Lancashire	Floorspace (sqm)	15,633	24,221	77,510	108,119	273,344	108,945	277,232	0	885,005
	Total Properties	221	170	235	152	140	16	14	25	973

Source: EGi 2023

**Figure 14 – Industrial Transactions in Central Lancashire, 2013-2023**

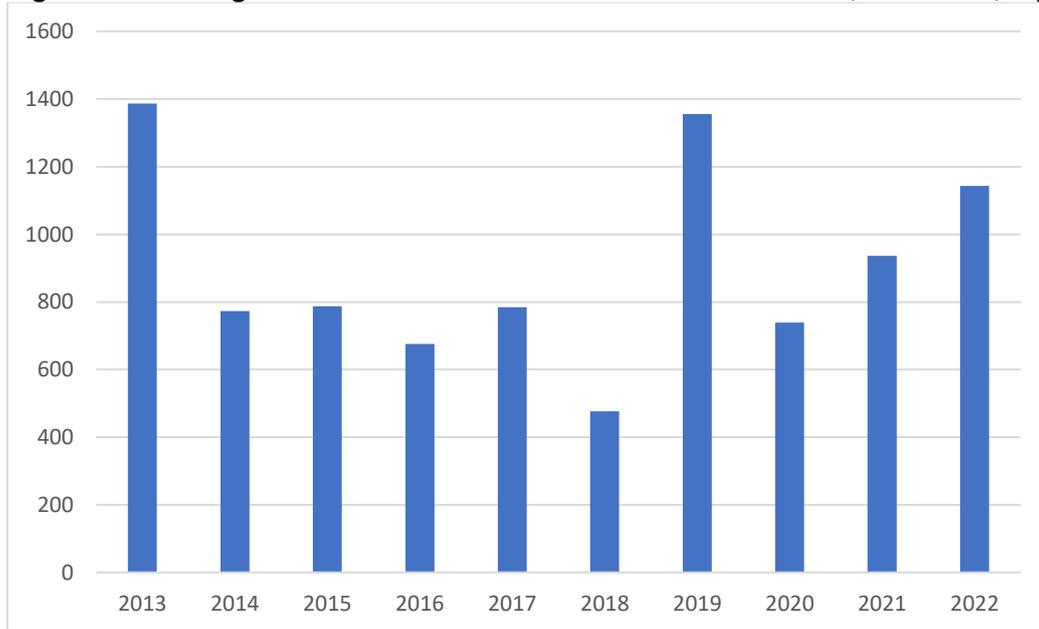


Source: EGi 2023

2.80 Figure 14 shows Central Lancashire experienced a spike in industrial transactions in 2016, with 174 transactions, followed by a secondary spike in 2018 with 128 transactions. Since 2018, a year-on-year decline in transactions was observed until 2021 when only 32 transactions occurred, a 75 percent fall on 2018. 2022 saw 76 deals occur, which represented a return to the levels seen immediately before the pandemic but still below the decade’s average of 97 deals/year.

2.81 Figure 15 displays the average floorspace transacted per deal, for each full year, for the past decade, in sqm. For the last few years, average floorspace levels have been increasing, till 2022 when an average deal size of 1,143 sqm was recorded. This is notably above levels in the mid 2010’s when the average deal was for less than 800 sqm of premises.

**Figure 15 – Average Size of Deal Transacted in Central Lancashire, 2013-2023, Sqm**



Source: EGi 2023

2.82 By local authority area, the following trends can be noted:

- Chorley – Within the last ten years 207 industrial transactions have been recorded in Chorley, totalling 175,431 sqm of floorspace. The 201-500 sqm size band has been the most popular in Chorley with the 45 deals taking place accounting for 22 percent of the decade’s total. However, there was reasonable market activity for all premises sizes up to 5,000 sqm. The average rent over the decade was £8.08/sqft (£87/sqm) with a prime rent of £14.50/sqft (£156/sqm) recorded at Strawberry Meadows Business Park in 2022 on three separate occasions for three 186 sqm units
- Preston – Within the last ten years 314 transactions have been recorded in Preston, totalling 245,678 sqm of floorspace. Units of 201-500 sqm were most popular, accounting for more than a quarter of transactions, although market interest for units up to 5,000 sqm each was noted. The average rent over the decade was £5.80/sqft (£62/sqm) with a prime rent of £11/sqft (£118/sqm) recorded at the Preston East Junction 31a development for larger units of around 5,000 sqm let to a strong tenant, DPD
- South Ribble – 452 deals took place in South Ribble between 2013 and 2023, totalling 466,743 sqm. Average transaction rates in South Ribble were smaller than elsewhere. 29 percent of transactions were for units of 0-100 sqm in size, focused at South Rings Business Park, Matrix Park and Old Mill Industrial Estate. This is in contrast to Chorley and Preston where 201-500 sqm buildings

are the most in demand. The average rent over the decade was £5.00/sqft (£54/sqm) with a modest prime rent of £6.50/sqft (£70/sqm). The latter was paid in 2022 by Montgomery Distribution Limited for a 12,521 sqm unit on Walton Summit Industrial Estate.

### Office

2.83 787 office deals were recorded in Central Lancashire between 2013 and 2023, with a floor area totalling 247,454 sqm. As Table 4 shows, suites of 0-100 sqm were popular with 270 transactions occurring throughout the decade in this size range, over a third of the decade total.

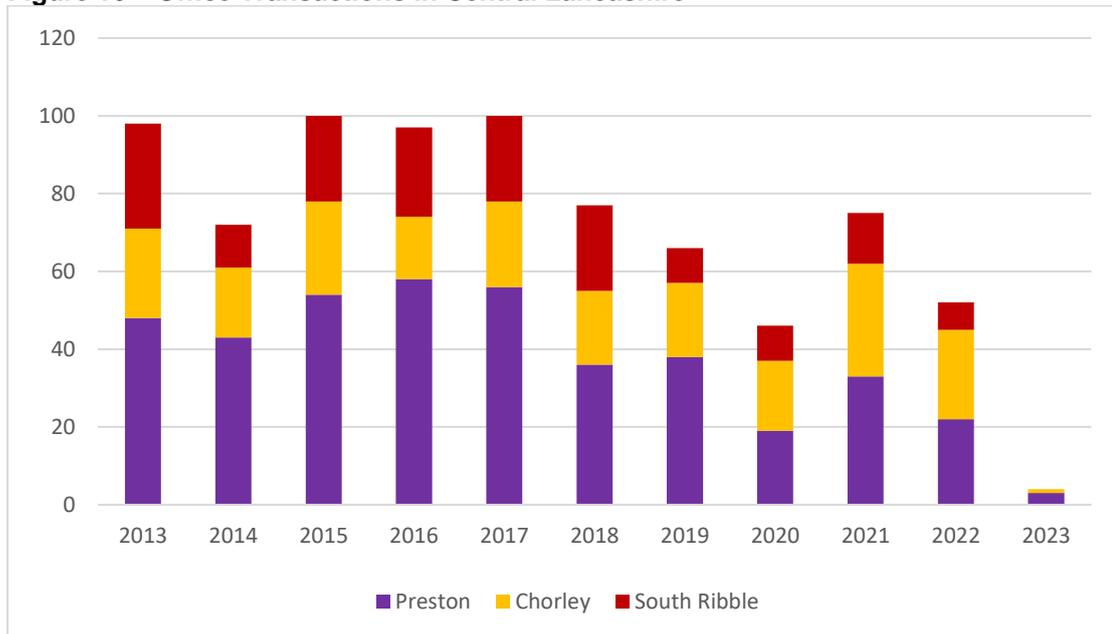
**Table 4 – Summary of Office Transactions 2013-2023 by Size Band**

Area		Size Band (sqm)							Unknown	Total
		0-100	101-200	201-500	501-1,000	1,001-5,000	5,001-10,000	10,000+		
Preston	Floorspace (sqm)	6278.0891	18,269	27,601	21,922	63,203	18195.86	0	0	155,469
	Total Properties	117	130	85	30	31	3	0	14	410
Chorley	Floorspace (sqm)	3,501	8,120	12,946	8,217	7,820	0	0	0	40,604
	Total Properties	95	55	40	13	5	0	0	4	212
South Ribble	Floorspace (sqm)	2,967	5,084	14,236	6,645	15,547	6,902	0	0	51,382
	Total Properties	58	36	45	10	7	1	0	8	165
Central Lancashire	Floorspace (sqm)	12,747	31,473	54,784	36,784	86,570	25,098	0	0	247,454
	Total Properties	270	221	170	53	43	4	0	26	787

Source: EGi 2023

2.84 As Figure 16 shows, since 2018, there has been a decline in the number of office deals reaching record lows in 2020, slightly rebounding in 2021 before falling again in 2022. The number of office deals in 2022 (52) was nearly half the 90-100 transactions recorded over 2015-2017. Thus office transaction rates in the 2020s, so far, remain well below previous peaks in the 2010s.

**Figure 16 – Office Transactions in Central Lancashire**



Source: EGi 2023

2.85 By local authority area, the following trends can be noted:

- Chorley – 212 office transactions occurred in Chorley over the past decade, totalling 40,604 sqm. The 0-100 sqm size band was the most popular in Chorley over the past decade with 95 deals, 45 percent of the total, falling within this size range. The average rent achieved was £14.52/sqft (£156/sqm). The highest rent achieved per annum of the decade was seen in 2020 when a 560 sqm office at Ackhurst Business Park was let for £87,290/year by Taziker Construction Management Limited.
- Preston – Within the last ten years 410 office transactions were recorded in Preston totalling 155,469 sqm. Suites of 101-200 sqm were most popular, accounting for almost a third of all transactions. Overall, the vast majority of transactions were for units of 0-500 sqm. Average office rents over the decade were £10.90/sqft (£117/sqm)
- Preston City Centre – Within the last ten years 154 office transactions were recorded in specifically in Preston City Centre, 38 percent of all recorded transactions in the City. These comprised 69,697 sqm of floorspace, making up 45 percent of all the floorspace transacted in Preston. As for the Borough as whole, the majority of transactions were in the 0-100 sqm and 101-200 sqm

size bands being most in demand while all but 26 recorded transactions were for units of less than 500 sqm. The average achieved City Centre rent for the decade was £9.47/sqft (£102/sqm). The highest achieved rent was £31.43/sqft (£338/sqm) which was paid in 2019 for Suite E in The Watermark building on Ribbleton Lane, a serviced business centre operated by W\_rkspace.

- South Ribble – Within the last decade 165 office transactions have taken place in South Ribble, totalling 51,382 sqm of floorspace. Again, the 0-100 sqm size band was the most popular, accounting for over a third of the decade's total deal. However, as was the case for Preston, good market demand continues for offices up to 500 sqm. The average recorded rent was £11.73/sqft (£126/sqm). The highest level of rent achieved of the decade was £478,263/year which was paid in 2015 for a 2,780 sqm office unit at Gordon House on Spectre Way by James Fisher Nuclear. The second and third highest rents achieved of the decade took place in 2018 when units 1,243 sqm and 975 sqm in size at Matrix Park in Buckshaw Village were rented for £188,824 and £131,000/year respectively.

### **Property Supply**

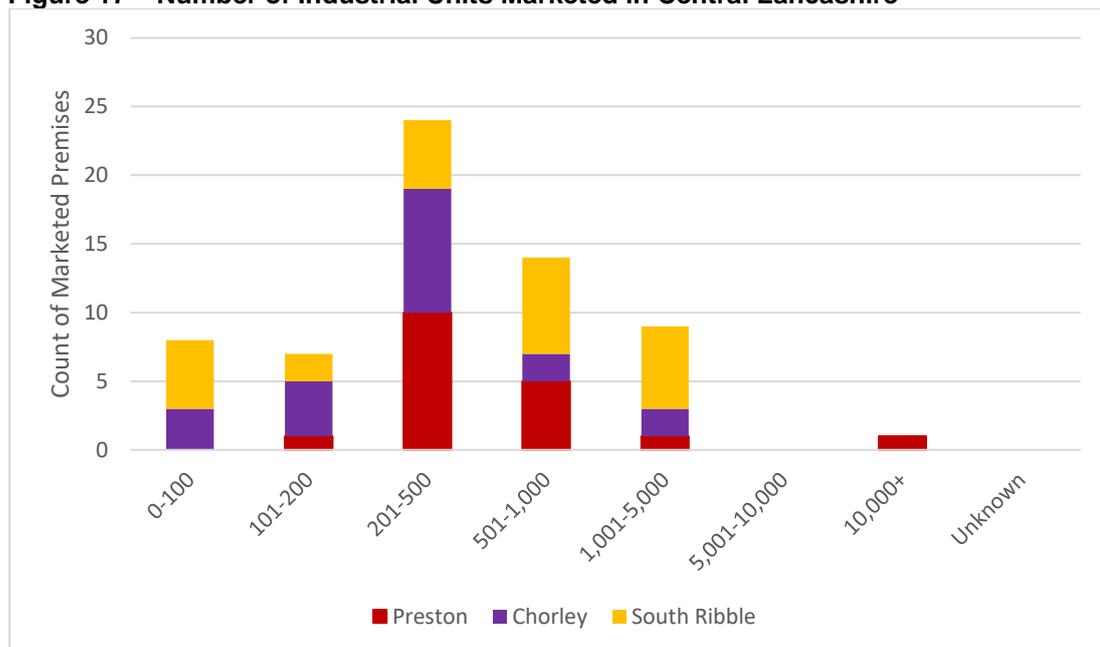
- 2.86 The commercial premises being marketed at the start of this Study (autumn 2023) have been analysed as a proxy of the vacant premises within Central Lancashire. It is recognised that not all vacant premises are marketed, with landlords choosing not to market the premises for a variety of reasons, e.g., the property is committed to an occupier but not yet occupied, previously marketed and no occupiers found, strategic business planning, etc.). Furthermore, marketed premises may include some as yet unconstructed premises (i.e., being sold/let off plan) and thus would not be considered existing vacant stock. This is also a snapshot in time as marketed premises are constantly changing as leases and transactions are completed and further stock becomes available. However, the actively marketed stock provides a good indication of the capacity for the market to absorb additional demand and would represent the choices available to businesses looking for new premises.

### **Industrial**

- 2.87 As of the time of this Study there were 20 available units in Chorley totalling 8,135 sqm; 18 vacant industrial premises in Preston totalling approximately 23,339 sqm and 20 units available in South Ribble, totalling 16,337 sqm. The total for Central Lancashire is 63 industrial units with a total floor area of 47,811 sqm.

2.88 The total quantity of floorspace being marketed has shrunk by 62,916 sqm, a 57 percent decrease, since the 2022 Study. The reduction was even across the three local authority areas, declines of 56-58 percent. As Figure 17 shows, the strongest supply was for 201-500 sqm units while options for sub-200 sqm space was modest. Sub 200 sqm units made up 40 percent of the decade’s market transactions.

**Figure 17 – Number of Industrial Units Marketed in Central Lancashire**



Source: EGi 2023 and Various Property Websites 2023

2.89 Of the available properties on the market in Central Lancashire, 51 units were available on a leasehold basis, eight on a freehold basis and four on either a freehold or leasehold basis.

2.90 In terms of overall current supply, the 63 available industrial units comprising 47,811 sqm compares to the average of take up of 86 units/year and 88,501 sqm/year of floorspace transacted over the last decade. On this basis, Central Lancashire only has 8.8 months of forward industrial supply by units, 6.5 months by floorspace, assuming an average rate of take up per year.

**Office**

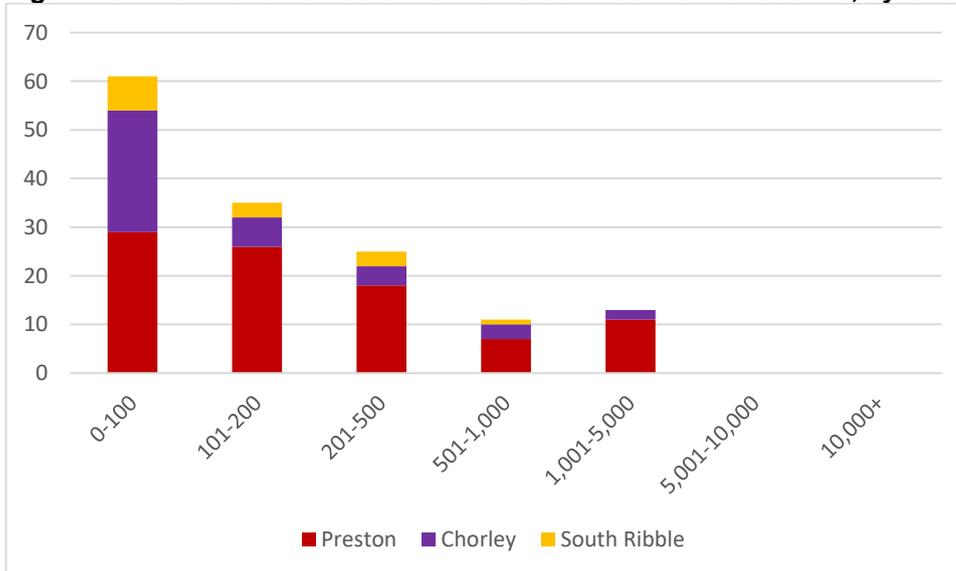
2.91 There were 41 available units in Chorley totalling 8,598 sqm; 93 vacant office premises in Preston totalling 37,121 sqm and 14 units available in South Ribble, totalling 2,681

sqm. The total for Central Lancashire was 148 office units with a total floor area of 48,401 sqm.

2.92 The total quantity of floorspace being marketed has fallen across all three areas since the 2022 Study – Preston’s floorspace has fallen by 11,879 sqm, South Ribble’s by 15,463 and Chorley’s by 14,622 sqm. Therefore overall, in Central Lancashire the total quantity of marketed stock has decreased considerably, by 41,963 sqm from 90,364 sqm, i.e., a 46 percent reduction in supply in approx. two years. Some of this may reflect wider reductions in the total stock of offices in Central Lancashire, something noted in Section 3.0.

2.93 As Figure 18 shows, 0-100 sqm size bracket was most widely available across Central Lancashire, accounting for 61 units or 41 percent of the total. Most supply is in the 0-500 sqm range, accounting for 82 percent of the availability, reflecting historic take up as evidenced through the transactions data above. Figure 18 displays a similar picture to that observed in the last Study with significant numbers of premises being marketed in the small to medium size ranges, and most larger premises found in Preston.

**Figure 18 – Number of Office Units Marketed in Central Lancashire, by Size Range, Sqm**



Source: EGI 2023 and Various Property Websites 2023

2.94 In terms of overall current supply, the 148 available office units comprising 48,401 sqm compares to the average of 79 units/year and 24,745 sqm/year of floorspace transacted over the last decade. Thus, Central Lancashire has a forward supply of around 2 years by units and also floorspace, assuming an average annual take up

rate.

- 2.95 Of the available office properties on the market in Central Lancashire, 137 units were available on a leasehold basis, four on a freehold basis and seven on either a freehold or leasehold basis.

### **Valuation Office Data**

- 2.96 The Valuation Office Agency (VOA) provides data on the overall number of business premises (hereditaments) and overall floorspace by broad use type, including offices and industrial/ warehousing. Utilising the vacancy information above, and VOA data on the total stock of industrial premises in each local authority area, the following vacancy rates can be identified:

- Chorley: Total stock is 1,130 units total comprising 603,000 sqm. There were 20 available units in Chorley totalling 8,135 sqm. This equates to a vacancy rate of 1.8 percent by units, 1.3 percent by floorspace.
- Preston: Total stock is 2,100 units total comprising 943,000 sqm. There were 18 available units in Preston totalling 23,339 sqm. This equates to a vacancy rate of 0.9 percent by units, 2.5 percent by floorspace.
- South Ribble: Total stock is 1,190 units total comprising 1,111,000 sqm. There were 20 available units in South Ribble totalling 16,337 sqm. This equates to a vacancy rate of 1.7 percent by units, 1.5 percent by floorspace.

- 2.97 For offices, the figures are:

- Chorley: Total stock is 690 units total comprising 86,000 sqm. There were 41 available units in Chorley totalling 8,598 sqm. This equates to a vacancy rate of 5.9 percent by units, 10.0 percent by floorspace.
- Preston: Total stock is 1,290 units total comprising 322,000 sqm. There were 93 available units in Preston totalling 37,121 sqm. This equates to a vacancy rate of 7.2 percent by units, 11.5 percent by floorspace.
- South Ribble: Total stock is 540 units total comprising 123,000 sqm. There were 14 available units in South Ribble totalling 2,681 sqm. This equates to a vacancy rate of 2.6 percent by units, 2.2 percent by floorspace.

- 2.98 Vacancy rates of 5-10 percent, or 90-95 percent occupancy, can be considered a reasonable balance between a vibrant, active market, providing good returns to landlords and providing capacity for churn and growth in the market. A higher

occupancy rate is an indicator of a full market with businesses having difficulties in finding adequate premises. A lower occupancy rate indicates long-term unoccupied and derelict stock and poor business growth.

- 2.99 The industrial vacancy rates are all well below 5 percent, suggesting fairly uniform supply shortages across Central Lancashire. This was also true in the 2017 Central Lancashire Employment Land Study, the last time occupancy was measured in this way, suggesting that this is a long term issue.
- 2.100 In terms of offices, only South Ribble has vacancy rates of less than 5 percent, something that was not the case in 2017. Rates in Chorley and South Ribble are largely within 5-10 percent range, suggesting a large offer of space options for businesses and even some oversupply in the case of office floorspace in Preston. Interestingly vacancy rates in Preston were even higher in 2017, at around 12-14 percent.
- 2.101 It is important to note that these figures only measure premises which is vacant and, on the market, i.e. stock which is available to businesses. It does not count properties which are vacant but not being marketed, the inclusion of which would increase vacancy rates further. Additionally, data is not available to test vacancy rates below the local authority level, in sub-areas such as Preston City Centre.

### **Property Market – Stakeholders**

- 2.102 The above analysis of the property data pertaining to Central Lancashire has been supported by consultations with commercial property agents active in the Sub-Region. Agents were asked about activity levels in Central Lancashire, and the three local authority areas individually, key market sectors, spatial differences, the key employment nodes and the recent impacts of factors such as the Covid-19 Pandemic. Feedback from the agents is summarised in the tables below. Information provided has been separated from the name of the agent or agency to protect confidentiality. Table 5 provides a summary of the comments received from stakeholders with regards to the local industrial property market.

**Table 5 – Property Market Comments – Industrial**

Contact	Comment
Regional Agent	<ul style="list-style-type: none"> <li>• The post Covid-19 recovery peaked in spring 2022, with some heat leaving the market since then</li> <li>• Rents and capital values have stabilised after two years of rapid growth</li> <li>• More modest prospects of financial growth mean less investor demand, but demand from occupiers remains strong, particularly at the smaller end of the market</li> <li>• There remains a strong shortage of 1,000-2,000 sqm units across the sub-region</li> <li>• Prime rents are £9.00-9.50/sqft (£97-102/sqm) for units of 1,000 sqm upward, smaller units are achieving £10.00-13.00/sqft (£108-140/sqm)</li> <li>• Viability can be an issue as construction costs still haven't stabilised. In turn, this is affecting land values.</li> <li>• Overall, Buckshaw Village, Euxton Lane are the focus for market interest in Chorley; Bamber Bridge the focus in South Ribble and North East Preston/Riversway the focus in Preston</li> </ul>
Regional Agent	<ul style="list-style-type: none"> <li>• Employment land remains scarce in the sub-region with no opportunities for occupiers to engage in design and build almost anywhere in the county, especially SMEs.</li> <li>• Viability is a barrier for developers, which is delaying delivery on a number of consented sites (although feel that some developers now have unrealistic value assumptions). It can now take some three years to bring forward a site and this is too long for many seeking space</li> <li>• However, demand remains strong even if the range of companies seeking space has reduced. The logistics market in particular appears less diverse.</li> </ul>
Regional Agent	<ul style="list-style-type: none"> <li>• The market has not changed much since 2021, with strong demand, a shortage of land and stock and not much coming through the pipeline</li> <li>• Botany Bay Business Park, Chorley is coming through but is quite expensive, with a 10,000 sqm unit on the market for £9.50/sqft (£102/sqm) which is similar to what you would find in the Golden Triangle of the Midlands</li> <li>• Overall, Buckshaw Village, Euxton Lane and Botany Bay are the focus for market interest in Chorley; Bamber bridge the focus in South Ribble and North East Preston/Riversway the focus in Preston</li> <li>• Demand is strong up to 1,000 sqm, and slightly softer up to 2,000 sqm, reflecting the higher rents for larger space. Also, a need for freehold options.</li> <li>• In terms of rents, smaller units are achieving £12/sqft (£129/sqm) larger sheds £7.50/sqft (£81/sqm)</li> <li>• Yields were 4.5 percent now 5.5-6.5 percent for prime industrial</li> <li>• The markets have not been impacted by the energy and cost of living crisis.</li> <li>• The supply is not there due to a lag in the market, Covid put these schemes on hold</li> <li>• There is a shortage of land but less so in Central Lancashire than in some areas such as East Lancashire</li> <li>• Yields similar to what they were, investment yields dropped off due to the higher interest rates</li> <li>• But freehold owner occupier yields have not changed, with a lot of businesses with the finance available to buy.</li> </ul>

Contact	Comment
Regional Agent	<p><i>Titan Business Park, Moss Side Test Track</i></p> <ul style="list-style-type: none"> <li>• Strong initial interest, so much so that it started advertising too early as businesses enquiring need readily available space</li> <li>• Most demand is for small-mid sized units of sub 1,000 sqm, however, have had a couple of enquiries for units of between 1,000-5,000 sqm</li> <li>• Local businesses enquiring, not inward investment.</li> </ul>

Source: BE Group, 2023

2.103 Table 6 provides a summary of the comments received on the local office property market.

**Table 6 – Property Market Comments – Office**

Contact	Comment
National Agent	<ul style="list-style-type: none"> <li>• Preston City Centre remains a tough market, with little turnover of space or inward investment</li> <li>• Rental levels have not changed in many years with no new builds. The market hasn't moved forwards</li> <li>• Rising build costs against stagnant rents mean that new build offices are not viable</li> <li>• Grade A space, if was there, would be taken up, this happened in Blackpool or Blackburn, were high grade office development was backed by the local authority</li> <li>• What demand exists is for good quality offices with good motorway access of less than 500 sqm in size</li> <li>• Rents – £10-11/sqft (£108-118/sqm) in Preston City Centre with prime rents of £12.50-14.50/sqft (£135-156/sqm) achievable at Fulwood, Riversway and Bamber Bridge.</li> </ul>
Regional Agent	<ul style="list-style-type: none"> <li>• Demand is for smaller suites on flexible terms, reflecting a growing model of hybrid working</li> <li>• Feels it will be largely impossible to gain a single occupier for larger 1,500-2,000 sqm suites and such units will need to be broken up</li> <li>• Prime rents are £15/sqft (£161/sqm). Landlords are trying to maintain that headline rent by offering incentives, it has been the same for the last 18 months but might see a slip</li> <li>• Real viability issues, don't think there is the demand there to support new build development</li> <li>• There is still demand for second hand space including freehold units of 200-300 sqm from owner occupiers</li> </ul>
Regional Agent	<ul style="list-style-type: none"> <li>• The office market remains quieter than the industrial market. Hybrid working is here to stay which is reducing the quantum of space businesses need.</li> <li>• Businesses are releasing space, particularly at lease events, which is leading to a lot of lower grade supply coming forward</li> <li>• Where occupiers are acquiring space it is increasingly to consolidate their business functions in one higher grade unit rather than multiple offices</li> <li>• In this market there is no appetite to build offices, rents have diminished since the Pandemic and would need to be double what they are for viability – Presently at £10-12/sqft (£108-129/sqm) for existing Grade A, would need to be at £25/sqft (£269/sqm)</li> <li>• Preston has no Grade A space in the City Centre. Businesses are forced to go out of town. That will not change without public sector investment, however.</li> </ul>

Contact	Comment
Regional Agent	<ul style="list-style-type: none"> <li>• Marketed Ackurst Business Park, Chorley which held up well during the Covid-19 Pandemic. It now achieves £13/sqft (£140/sqm)</li> <li>• Have seen demand at Buckshaw Village and Bamber Bridge, including for larger offices of up to 1,100 sqm from businesses are looking for a central hub, rather than having teams spread around the region</li> <li>• Currently have a requirement for 300 sqm office but there is not anything of any quality in Central Lancashire, to meet this need</li> <li>• Central Lancashire would need more Grade A accommodation to compete for inward investment, however.</li> <li>• Demand is for Motorway linked sites, however less so for Preston City Centre. In Preston, businesses would likely go to the Docks or Fulwood.</li> </ul>

*Source: BE Group, 2023*

2.104 In terms of the industrial and warehouse market, the pent-up demand of the 2020-2021 Pandemic period was met in 2022, leading to a slight cooling of the market moving forward and more modest growth of rents and values, compared to what has been achieved over the last few years. Increasing construction costs, a symptom of national inflationary pressures in 2023, are making new build development more challenging but the result seems to be delays in development rather than an absence of construction. Developers may hold onto sites for longer, awaiting improving conditions, but there is no assumption that schemes will not ultimately come forward. There remains a healthy demand for industrial/warehouse land and continued reports of land shortages.

2.105 Economic issues mean that industrial/warehouse units are less attractive to investors but there remains strong demand from occupiers, for properties of up to 2,000 sqm each and particularly sub-1,000 sqm units. This includes interest for freehold premises, particularly from owner occupiers. It was noted that while investment yields have dropped off over 2022-2023, from 4.5 percent to 5.5-6.5 percent, owner occupier yields remain strong, with a lot of businesses with the finance available to buy.

2.106 Prime industrial rents are £9.00-9.50/sqft (£97-102/sqm) for units of 1,000 sqm upward, with smaller units are achieving up to £13.00/sqft (£140/sqm) and larger sheds £7.50/sqft (£81/sqm). Market interest is spread across the sub region but particular focus for demand includes Buckshaw Village, Euxton Lane and Botany Bay in Chorley; Bamber Bridge in South Ribble and North East Preston/Riversway in Preston.

- 2.107 The office market remains constrained following the Covid-19 Pandemic. Trends of hybrid working, begun during the Lockdowns are here to stay leading to the release of surplus space and the consolidation of businesses into one high grade office rather than several properties. The net result is that supply exceeds demand across the sub-region, particularly for lower grade space. In principle this may also lead to an increased demand for the higher grade offices businesses are relocating to. However, relocating businesses are not always able to pay the higher rents which would allow new modern offices to be developed.
- 2.108 Demand exists for suites of up to 500 sqm each, including freehold options and particularly Grade A options, alongside a modest number of larger requirements, focused close to the Motorway junctions. However, viability remains a significant barrier to new development. Even in Preston City Centre and key business parks, rents do not exceed £14.50/sqft (£156/sqm), well below the rates at which new build offices would be viable, around £25/sqft (£269/sqm). Thus, it cannot be assumed that extensive new build offices will be brought forward on any of the sites considered in Section 4.0. This does not preclude the possibility of office space within largely industrial/warehouse schemes or that individual industrial and warehouse units will not include significant elements of office accommodation.

### **Summary**

- 2.109 Over the decade 2011-2021 Central Lancashire's population grew by 5.7 percent over the decade from 356,414 in 2011 to 376,604 in 2021. The largest population growth was recorded in Chorley, a gain of 10,577 people or a 9.9 percent increase. Preston saw the second highest growth, a gain of 5.4 percent or 7,633 people. South Ribble gained a more modest 1,978 people or a 1.8 percent change.
- 2.110 Most growth in the sub-region was in the over 65s. Overall, Chorley and Preston saw modest gains in their working age populations – 3.9 percent and 2.9 percent respectively – or around 2,680 additional people each. South Ribble however, lost working age people over the same period, a reduction of 2,277 people or 3.3 percent.
- 2.111 The growth in population has been focused around two broad areas, the north west of Preston and in, and around, Buckshaw Village and Clayton-Le-Woods, in Chorley and South Ribble. This was unsurprising as both locations have been a focus for housing development over the last decade.

2.112 Homeworking rates were around three times higher in 2021 than in 2011 in all three local authorities, with greater proportions of homeworking in Chorley and South Ribble. Thus, however exaggerated these figures were by the circumstances of 2021, homeworking clearly has a greater role in the economy of the sub-region than was the case in 2011, reflecting regional and national trends.

2.113 Increasing inflation has been a growing concern over 2021-2023, with peak in inflationary growth in October 2022. A key impact of inflation in the commercial development market has been increasing construction costs which can impact on development viability while any growth in interest rates, undertaken to mitigate inflation, will increase the costs of commercial development finance. In the short term this issue is likely to inhibit some development activity, however, the latest Bank of England forecasts suggests a return to low inflation rates by 2025. More generally, limited or negative growth is forecast for 2023, but an improved economic picture is projected from 2024 onwards.

2.114 Comparing recent employment and business number data suggests the following trends:

- Reflecting forecasting, the trend in Manufacturing employment, in Central Lancashire, is broadly negative. However, the sub-region has continued to add manufacturing businesses during recent years, likely mostly micro firms
- Notwithstanding the large drop in employment in South Ribble, Central Lancashire saw reasonable overall growth in the Construction sector since 2019, with an increase of 210 new businesses recorded. Again, it is assumed most new firms were micro in size, generating only modest further employment
- Transport and storage has been another growth sector across Central Lancashire, adding companies in all three local authority areas, 250 in total, and jobs in Chorley and South Ribble
- The position in the private office sectors has been mixed in terms of both jobs and businesses. Growth has most consistently been seen in Financial and insurance, Property and, less frequently, ICT. However, this is largely offset by losses in Professional and Business services. Overall, 2019-2021/22 saw a modest net reduction in the private office economy of Preston (10 less businesses and 250 less jobs) and South Ribble (20 less businesses and 900 less jobs). Only Chorley saw any overall net growth, with a gain of 35 businesses and 200 jobs recorded.

Thus, it appears that the events of recent years have inhibited growth in the office economy overall, although not necessarily by a large amount.

2.115 The market trends, in the key sectors – industrial, warehouse and offices – are summarised below.

*Industry*

2.116 Nationally and regionally in spite of some interruptions to operations, from lockdown restrictions, manufacturing businesses boomed over 2020-2021 driven by growing e-commerce. A strong industrial market continued over the first half of 2022 but fell back in the second half in the face of growing economic uncertainties. Despite this 2022 still saw the second highest industrial take up rates on record, after 2021.

2.117 In spite of ongoing macro-economic uncertainty in 2023, and the risk of a poor economic recovery, if not a recession, in the near future, the industrial market is proving highly resilient. In Central Lancashire, this is evidenced by the recent commencement/completion of several private sector B2/B8 schemes including Botany Bay Business Park in Chorley, at Preston East and at Farington Hall in South Ribble, with further phases of all in the pipeline. Nationally, the industrial market has seen continuing requirements from manufacturers for new build high grade space, both from local firms and larger companies seeking to re-shore and safeguard their supply chains within the UK.

2.118 Industrial demand is thus projected to remain strong in the short term, even if macro-economic conditions prove worse than forecast. If the economic constraints of 2023 do turn into a prolonged recession this will inevitably inhibit demand although not for the whole plan period – the last major recession limited the property market for some six years, 2008-2013, and was followed by a strong recovery.

2.119 Local market stakeholders support the above points adding that while economic issues mean that industrial/warehouse units are less attractive to investors but there remains strong demand from occupiers, for properties of up to 2,000 sqm each and particularly sub-1,000 sqm units. This includes interest for freehold premises, particularly from owner occupiers. Market interest is spread across the sub region but particular focus for demand includes Buckshaw Village, Euxton Lane and Botany Bay in Chorley; Bamber Bridge in South Ribble and North East Preston/Riversway in Preston.

- 2.120 In Central Lancashire, over the last decade, the size band of 201-500 sqm saw the highest number of transactions, comprising almost a quarter of all deals. Most transactions were for units of less than 5,000 sqm.
- 2.121 In terms of overall current supply in Central Lancashire, the 63 available industrial units comprising 47,811 sqm compares to the average of take up of 86 units/year and 88,501 sqm/year of floorspace transacted over the last decade. On this basis, Central Lancashire only has 8.8 months of forward industrial supply by units, 6.5 months by floorspace, assuming an average rate of take up per year.
- 2.122 Compared to total industrial, and warehouse stock levels, industrial vacancy rates across Central Lancashire are all well below 5 percent, suggesting fairly uniform supply shortages across Central Lancashire. This was also true in the 2017 Central Lancashire Employment Land Study, the last time occupancy was measured in this way, suggesting that this is a long term issue.

#### *Warehousing*

- 2.123 Across the UK, demand for logistics premises increased significantly in 2020-2021 in response to the substantial changes in consumer behaviour leading up to and during the lockdowns, including spikes in demand for certain consumer items and increasing use of online retailing. Demand remained strong in 2022. After three years of record breaking take up, stakeholders expect transaction rates in 2023 to be more moderate, but still well above the 10-year average. While reduced consumer spending may inhibit demand from retailers moving forward, logistics requirements are now coming from an increasingly diverse range of occupiers.
- 2.124 While logistics growth will continue to be focused on prime locations on the motorway corridors, supply shortages will encourage the take up of good secondary locations as well. In Central Lancashire, all three local authorities have large sites close to motorway junctions including North East Preston; Great Knowley/Botany Bay, Chorley and Cuerden, South Ribble which can benefit from ongoing demand for larger B8 uses.

#### *Offices*

- 2.125 During the 2020-2021 lockdowns, office-based firms adjusted to being able to work remotely. Since restrictions ended in early 2022, evidence is that the majority of office-based businesses continue to offer at least hybrid working options to some of their staff. Reflecting this trend, businesses are increasingly seeking flexibility in their office

accommodation, i.e., the ability to increase or decrease the amount of floorspace they occupy with relatively short notice, to meet changing staffing requirements. This new way of working favours serviced offices, co-working spaces and similar models over unserviced options.

- 2.126 For larger floorplate offices, the picture is mixed. In the light of changing working practices, established businesses have reviewed their long-term accommodation needs leading to a rationalisation of space with poorer quality accommodation returning to the market, while more modern offices are taken up.
- 2.127 In Central Lancashire, over the last decade, the size band of 0-100 sqm saw the highest number of transactions, with reasonable market activity for units up to 500 sqm, particularly in Preston and South Ribble.
- 2.128 Local market stakeholders confirm that demand exists for suites of up to 500 sqm each, including freehold options and particularly Grade A options, alongside a modest number of larger requirements, focused close to the Motorway junctions. However, viability remains a significant barrier to new development. Thus, it cannot be assumed that extensive new build offices will be brought forward on any of the sites considered in Section 4.0.
- 2.129 In terms of overall current supply in Central Lancashire, the 148 available office units comprising 48,401 sqm compares to the average of 79 units/year and 24,745 sqm/year of floorspace transacted over the last decade. Thus, Central Lancashire has a forward supply of around 2 years by units and also floorspace, assuming an average annual take up rate. Nearly four times the period of industrial supply, noted above, Central Lancashire has an office supply which can meet most needs and thus a greatly reduced requirement to deliver new space in the short term. This is common in Local Authority areas, where several years of constrained office market activity has left a substantial supply of lower grade offices, even if there are specific shortages of high grade stock in key locations with good transport access, potentially Preston City Centre but particularly locations which link well to the Motorway junctions which have been the historic foci of demand.
- 2.130 Compared to the total office stock in Central Lancashire, only South Ribble has vacancy rates of less than 5 percent. Rates in Chorley and South Ribble are largely within 5-10 percent range, suggesting a large offer of space options for businesses

and even some oversupply in the case of office floorspace in Preston.

### 3.0 FORCASTING UPDATE

#### Introduction

- 3.1 This section provides an updated OAN forecast exercise to reflect the revised local plan period 2023-2041 for the CLLP. For reasons discussed in Section 1.0, the forecast methodology (and the forecast period) has been updated from the 2022 Study so the resulting OAN outputs will differ from those of past studies.
- 3.2 Planning Practice Guidance states that the assessment of future land needs should be determined by looking at both past trends and future forecasting methods, and highlights that these should include historic land take-up and future employment/population change. The methodology employed in this study uses three models to identify OAN for Central Lancashire and its three component local authorities. None provide a definitive answer, but they provide influences to be understood. Trends and forecasts must also reflect market signals and therefore they are considered in the context of the market overview undertaken as part of this study.
- 3.3 The models are:
- Model 1: Historic Land Take-Up
  - Model 2: Labour Demand
  - Model 3: Labour Supply
- 3.4 **Model 1: Historic Land Take-Up** reviews the actual take-up of employment land in the local authority area over a period of time. The method is not wholly reliable as there will be peaks and troughs and also different time periods taken can also result in different outcomes. For example, a period of sustained growth may show a high average take-up whereas looking over a recessionary period could well reflect low or even nil take-up. Additionally, the monitoring of employment land take up has become more challenging for Councils since 2020, given changes in Permitted Development Rights and the Use Classes Order, which allow more changes of use within, and from, the E(g)/B-Class uses without the need to seek planning consent. Councils are also under pressure to prioritise the monitoring of housing take up, a factor given more importance in national policy and local authority resourcing, over employment land take up.

- 3.5 **Model 2: Labour Demand** relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs figures are then translated to land using a formula based on a jobs to floorspace density which, in turn, can be translated into the projected land need. This scenario uses as its base the latest economic forecasts (winter 2023/2024), produced by Cambridge Econometrics for LCC and covering the Central Lancashire sub-region. These forecasts are the latest available projection on macro-economic conditions, reflecting issues such as the inflation spike in 2022/2023 from the war in Ukraine and instability in Government. They also provide consistency with other evidence base studies being completed for the CLLP in 2024. They do differ from the forecasts used in previous Central Lancashire Employment Land Studies, including the 2022 ELS.
- 3.6 The econometric forecasts are useful in that they analyse each industry sector and, in conjunction with other market data, the forecasts can identify where sectors may be growing, or shrinking which in turn can inform land and property needs. However, they also have several limitations. They are based on national and regional trends with some local adjustments for some industry sectors, which means, at a local level, economic activity is not always accurately represented. Also, merely translating jobs to land needs will not always reflect local property trends or changing working practices, which may alter jobs densities.
- 3.7 **Model 3: Labour Supply** A variation on Model 2, this uses the same method of forecasting as the Labour Demand method but takes forecast changes in the working population i.e., labour supply, rather than jobs – labour demand. It uses, as its base, a scenario of population change, which is described in more detail below.
- 3.8 The methods discussed above are ‘Policy Off’ in that they make no allowance for any major public sector programmes which might generate jobs above the baseline. The 2017 and 2019 Central Lancashire Employment Land Studies incorporated ‘Policy On’ Scenarios considering the extra jobs estimated to be created by the Samlesbury Enterprise Zone and City Deal programmes in Preston and South Ribble. However, the Enterprise Zone jobs estimates are now 13 years old and the City Deal estimates a decade old, with most City Deal projects now at least partly implemented. While there are other strategic projects proposed in Central Lancashire, at this time, most notably the development of the National Cyber Security Centre at Samlesbury, there are no clear forecasts of the jobs growth resulting from these schemes which could inform a

Policy On forecast. For this reason, a Policy On Scenario, relating to any active local programme is not undertaken here.

3.9 The methods, and calculations, are considered in turn.

**Model 1: Historic Land Take-up**

3.10 Employment land take-up annually is recorded by the three Councils. Data for the period 2010/2011 to 2022/2023 is provided in Tables 7 to 9, both gross and net of losses. Only data from 2010/2011 onwards is used in this Study, which differs from previous Central Lancashire ELS studies which used completion data from 1991/1992 onwards. The reasons for the shorter period of take up analysis are:

- To allow direct comparison between completions and losses, the latter having only been collated by the three Councils since 2010/2011
- To allow comparability between the outputs for the three local authorities
- To allow for the fact that there are data gaps and anomalous figures in the 1990s and 2000s completions data which cannot be easily cross checked. Some of these were highlighted in the 2022 ELS.

**Table 7 – Chorley Employment Land Take-Up 2010-2023, Gross and Net of Losses**

<b>Completion Period</b>	<b>Gross Completions</b>	<b>Losses</b>	<b>Net Change (Completions less Losses)</b>
2010-2011	2.63	-3.31	-0.68
2011-2012	2.38	-8.24	-5.86
2012-2013	6.49	-3.16	3.33
2013-2014	3.92	-0.83	3.09
2014-2015	1.71	-2.24	-0.53
2015-2016	5.79	-0.63	5.16
2016-2017	0.61	-1.28	-0.67
2017-2018	0.45	-0.7	-0.25
2018-2019	3.29	-3.03	0.26
2019-2020	3.59	-0.17	3.42
2020-2021	0.21	-0.12	0.09
2021-2022	1.91	-0.58	1.33
2022-2023	4.83	-2.66	2.17
<b>Total</b>	<b>37.81</b>	<b>-26.95</b>	<b>10.86</b>
<b>Annual average over 13 years</b>	<b>2.91</b>	<b>-2.07</b>	<b>0.84</b>

Source: CBC, 2024

**Table 8 – Preston Employment Land Take-Up 2010-2023, Gross and Net of Losses  
(Activity on EP1 employment land allocations only)**

Completion Period	Gross Completions	Losses	Net Change (Completions less Losses)
2010-2011	18.00	0	18.00
2011-2012	0	0	0
2012-2013	1.11	0	1.11
2013-2014	3.29	0	3.29
2014-2015	1.03	-0.90	0.13
2015-2016	0	0	0
2016-2017	0.93	-2.44	-1.51
2017-2018	4.8	0	4.8
2018-2019	2.2	-2.37	-0.17
2019-2020	0.27	-0.70	-0.43
2020-2021	0	0	0
2021-2022	0.53	0	0.53
2022-2023	1.8	-1.47	0.33
<b>Total</b>	<b>33.96</b>	<b>-7.88</b>	<b>26.08</b>
<b>Annual average over 13 years</b>	<b>2.61</b>	<b>-0.61</b>	<b>2.01</b>

Source: PCC, 2024

**Table 9 – South Ribble Employment Land Take-Up 2010-2023, Gross and Net of Losses**

Completion Period	Gross Completions	Losses*	Net Change (Completions less Losses)
2010-2011	14.62	-0.50	14.12
2011-2012	12.60	-0.98	11.62
2012-2013	0.70	-9.33	-8.63
2013-2014	0	-0.50	-0.5
2014-2015	0	-2.59	-2.59
2015-2016	4.63	-4.96	-0.33
2016-2017	8.98	-3.93	5.05
2017-2018	3.17	-54.97	-51.8
2018-2019	1.62	-0.47	1.15
2019-2020	1.39	-0.30	1.09
2020-2021	2.14	-2.58	-0.44

<b>Completion Period</b>	<b>Gross Completions</b>	<b>Losses*</b>	<b>Net Change (Completions less Losses)</b>
2021-2023	1.61	-0.60	1.01
<b>Total</b>	<b>51.46</b>	<b>-81.71</b> <i>(-27.54 less exceptional 2017-2018 loss)</i>	<b>-30.25</b> <i>(23.92 less exceptional 2017-2018 loss)</i>
<b>Annual average over 13 years</b>	<b>3.96</b>	<b>-6.29</b> <i>(-2.12 less exceptional 2017-2018 loss)</i>	<b>-2.33</b> <i>(1.84 less exceptional 2017-2018 loss)</i>

Source: SRBC, 2024

*\*For consistency between the three authorities, losses of E(c) (formerly A2) Use Class premises to other uses are excluded from these figures. Recorded losses are limited to land and premises originally in E(g), B2, B8 use.*

3.11 By local authority, the following can be noted:

- *Chorley* – Data is taken from the Chorley Employment Land Monitoring Report 2023, but excludes take up/losses from A2/E(c) uses to provide consistency with the data used in the 2022 Study and with data used for Preston and South Ribble
- *Preston* – Data was provided by the Council, with some updates and variation on figures provided in the 2022 ELS. Take up and losses data is only monitored in the Employment Sites/Areas identified under Policy EP1 of the existing Preston Local Plan (2015). It is accepted that this will exclude some change, particularly gains/losses in the City Centre, but it will incorporate most large scale E(g)/B-Class development/loss which will have occurred in the main business parks or industrial estates. The data records substantial take up of 18.00 ha in 2010/2011. This appears to primarily relate to the completion of the James Hall logistics facility at EP1.3 Preston East Employment Area. This was large for Preston specifically but less exceptional in the Central Lancashire context, with South Ribble seeing above average gross completion rates around the same time. Also given some of the large scale Call for Sites/SHELAA sites put forward for Preston, on motorway linked sites, and discussed in Section 4.0, larger scale B2/B8 developments are likely in Preston moving forward. Accordingly this take up remains relevant for projecting forward future needs.
- *South Ribble* – Data was provided by the Council, with some updates and variation on figures in the 2022 ELS. The provided loss data included some losses of E(c) (formerly A2) Use Class premises to other uses. These losses

were excluded for calculations to provide consistency with data for Chorley and Preston were only losses of E(g)/B-Class land and premises are considered. A high rate take-up was recorded in 2010/11 and 2011/12, when 27.22 ha of completions were noted during a period of low growth nationally. This is explained by the completion of two very large warehouse premises in the Borough over those two years – a development on Lancashire (Enterprises) Business Park, Farington, replacing a large fire damaged building, and completion of the 39,000 sqm Waitrose Regional Distribution Centre at Matrix Park, Buckshaw Village. These were large developments in the context of South Ribble but have been repeated more recently at Farington Park, which has been successfully developed speculatively for larger B2/B8 uses over the last two years, particularly for a 50,539 sqm B8 unit (NW.544). Large scale development is also likely at Cuerden (Lancashire Central) and accordingly this take up remains relevant for projecting forward future needs. Conversely, some -81.71 ha of losses were recorded in South Ribble, by far the largest amount of recorded losses of the three local authorities. This reflects an exceptional loss in 2017-2018 of -54.97 ha, 62.7 percent of the total for the decade. That loss primarily comprised the redevelopment of 54.17 ha of previously industrial land on Wesley Street, Bamber Bridge for 196 homes. This loss is more exceptional in the context of Central Lancashire and accordingly figures are given with and without this loss.

3.12 Based on this data Central Lancashire has seen 164.65 ha of gross take up since 2010/2011 or -4.48 ha of net take up, reducing to 60.86 ha net without the exceptional losses recorded in South Ribble in 2017-2018. Over the 13 year period this equates to the following average annual take up rates:

- Chorley: Gross 2.91 ha/year, Net 0.84 ha/year
- Preston: Gross 2.61 ha/year, Net 2.01 ha/year
- South Ribble: Gross 3.96 ha/year, Net -2.33/year (1.84 without the exceptional 2017-2018 loss)
- *Central Lancashire Totals: Gross 12.66 ha/year, Net 0.52 ha/year (4.69 less exceptional 2017-2018 loss in South Ribble)*

### **Split by Use Class**

3.13 It is necessary to break down past take up into the main employment use classes (E(g) (i, ii, iii), B2, B8) as this will give a guide to the proportions of land required, for each use class. This is shown in Tables 10 to 12.

3.14 For all three authorities the vast majority of the take up since 2010/2011 fell into the B2 or B8 Use Classes, with B8 dominating strongly in Preston and South Ribble. Little E(g)(iii) light industrial take up was recorded although, in practice some of the completions recorded as mixed use will include E(g)(iii) workshops. All three authorities saw some E(g)(i) office development, with South Ribble seeing the largest amount of completions, both overall and as a proportion of all take up.

**Table 10 – Take Up, Split by Use Class – Chorley\***

Year	E(g) Mixed	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed Use	Total
<b>Gross of Losses</b>								
Total	0.07	6.44	0.01	1.16	9.73	6.58	13.81	37.81
Percentage	0.2	17.0	0.0	3.1	25.7	17.4	36.5	100.0
<b>Net of Losses</b>								
Total	0.07	-2.65	0.01	0.22	3.17	4.17	5.86	10.86
Percentage	0.6	-24.4	0.1	2.0	29.2	38.4	54.0	100

Source: CBC, 2024

\* Data taken from the Chorley Employment Land Monitoring Report, 2023

**Table 11 – Take Up, Split by Use Class – Preston\***

Year	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed Use	Total
<b>Gross of Losses</b>							
Total	3.31	-	-	8.54	19.34	2.77	33.96
Percentage	9.7	-	-	25.1	56.9	8.2	100.0
<b>Net of Losses</b>							
Total	1.91	-	-	3.03	18.37	2.77	26.08
Percentage	7.3	-	-	11.6	70.4	10.6	100.0

Source: PCC/BE Group, 2024

\*Split of take up and losses, by Use Class, undertaken by BE Group reviewing available monitoring data to identify the predominant uses gained and lost.

**Table 12 – Take Up, Split by Use Class – South Ribble\***

Year	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	Mixed Use	Total
<b>Gross of Losses</b>							
Total	8.91	-	1.3	14.84	23.24	3.17	51.46
Percentage	17.3	-	2.5	28.8	45.2	6.2	100.0
<b>Net of Losses</b>							
Total**	5.25	0	1.3	1.09	16.34	-0.06	23.92
Percentage	21.9	0.0	5.4	4.6	68.3	-0.3	100.0

Source: SRBC, 2024

\* Data taken from multiple SRBC Monitoring sources.

\*\*Excludes the exceptional 2017-2018 loss. Including it adds a further 54.17 ha to the B2 losses figures.

### **Comparing Take Up to Employment Levels**

- 3.15 One point to highlight is that it is not possible to link land take up levels to jobs change in a local authority area with the available data. To illustrate this, Tables 13 to 15 convert recorded completions in the Chorley, Preston and South Ribble, since 2010/2011 to jobs using standard densities from the Homes England 'Employment Densities Guide' (2015). These can be compared to the jobs which were generated in Central Lancashire, in relevant sectors, over that same period. For this exercise only take up net of losses is used as this best accounts for both premises/jobs gained, and premises/jobs lost, through development change.

**Table 13 – Jobs Generated in Period vs Employment Land Take-Up 2010/11-2022/23 – Chorley**

Year	Office (inc. Research and Development)	Industrial (inc. Light Industrial)	Warehousing	Total
Recorded Take Up (Net of Losses), Hectares	-2.57	9.25*	4.17	<b>10.86</b>
Take Up Converted to Floorspace at 4,000 sqm/hectare, Sqm	-10,280	37,000	16,680	43,440
Jobs Density Applied (Sqm per Job)**	14	36	70	-
Jobs Generated*	-734	1,028	238	<b>532</b>
Actual Jobs Generated, as identified in Cambridge Forecasts	-4,312	203	115	<b>-3,994</b>

Source: Cambridge Econometrics, CBC, BE Group, 2024

\*Includes Mixed Use Take Up as this is likely to be majority industrial in character

\*\*Jobs Densities discussed further in Table 19 below.

**Table 14 – Jobs Generated in Period vs Employment Land Take-Up 2010/11-2022/23 – Preston**

Year	Office (inc. Research and Development)	Industrial (inc. Light Industrial)	Warehousing	Total
Recorded Take Up (Net of Losses), Hectares	1.91	5.80*	18.37	<b>26.08</b>
Take Up Converted to Floorspace at 4,000 sqm/hectare, Sqm	7,640	23,200	73,480	104,320
Jobs Density Applied (Sqm per Job)**	14	36	70	-
Jobs Generated	546	644	1,050	<b>2,240</b>
<i>Actual Jobs Generated, as identified in Cambridge Forecasts</i>	<i>4,771</i>	<i>225</i>	<i>20</i>	<b><i>5,016</i></b>

Source: Cambridge Econometrics, PCC, BE Group, 2024

\*Includes Mixed Use Take Up as this is likely to be majority industrial in character

\*\*Jobs Densities discussed further in Table 19 below.

**Table 15 – Jobs Generated in Period vs Employment Land Take-Up 2010/11-2022/23 – South Ribble**

Year	Office (inc. Research and Development)	Industrial (inc. Light Industrial)	Warehousing	Total
Recorded Take Up (Net of Losses), Hectares	5.25	2.33*	16.34	<b>23.92</b>
Take Up Converted to Floorspace at 4,000 sqm/hectare, Sqm	21,000	9,320	65,360	95,680
Jobs Density Applied (Sqm per Job)**	14	36	70	-
Jobs Generated*	1,500	259	934	<b>2,693</b>
<i>Actual Jobs Generated, as identified in Cambridge Forecasts (FTE Jobs which would occupy relevant space)</i>	<i>560</i>	<i>-997</i>	<i>135</i>	<b><i>-303</i></b>

Source: Cambridge Econometrics, SRBC, BE Group, 2024

\*Includes Mixed Use Take Up as this is likely to be majority industrial in character

\*\*Jobs Densities discussed further in Table 19 below.

3.16 Tables 13 to 15 show there is a limited relationship between take up and the number of jobs generated. A simple division of the floorspace created suggests that 5,465 jobs should have been generated across Central Lancashire. In reality, only 719 net jobs were generated. Even allowing for limitations in the Preston data, this is a sizable difference. Expressed another way a jobs density conversion suggests that new space should have generated some 113 jobs for every hectare of land developed, when in reality only 12 were. This is due to the significant variations in employment that occurs

even within one use class, which is due to a multitude of factors, including types of operation, hours of operation, storage needs, plant and equipment needs, car parking and intensity of operations.

- 3.17 However, Tables 13 to 15 also show that there are extensive differences between the use classes in terms of jobs generated which is why the use of a single jobs/hectare figure for all E(g)/B-Class sectors is unrealistic.

**Model 2: Employment Based Forecast – Baseline Forecast**

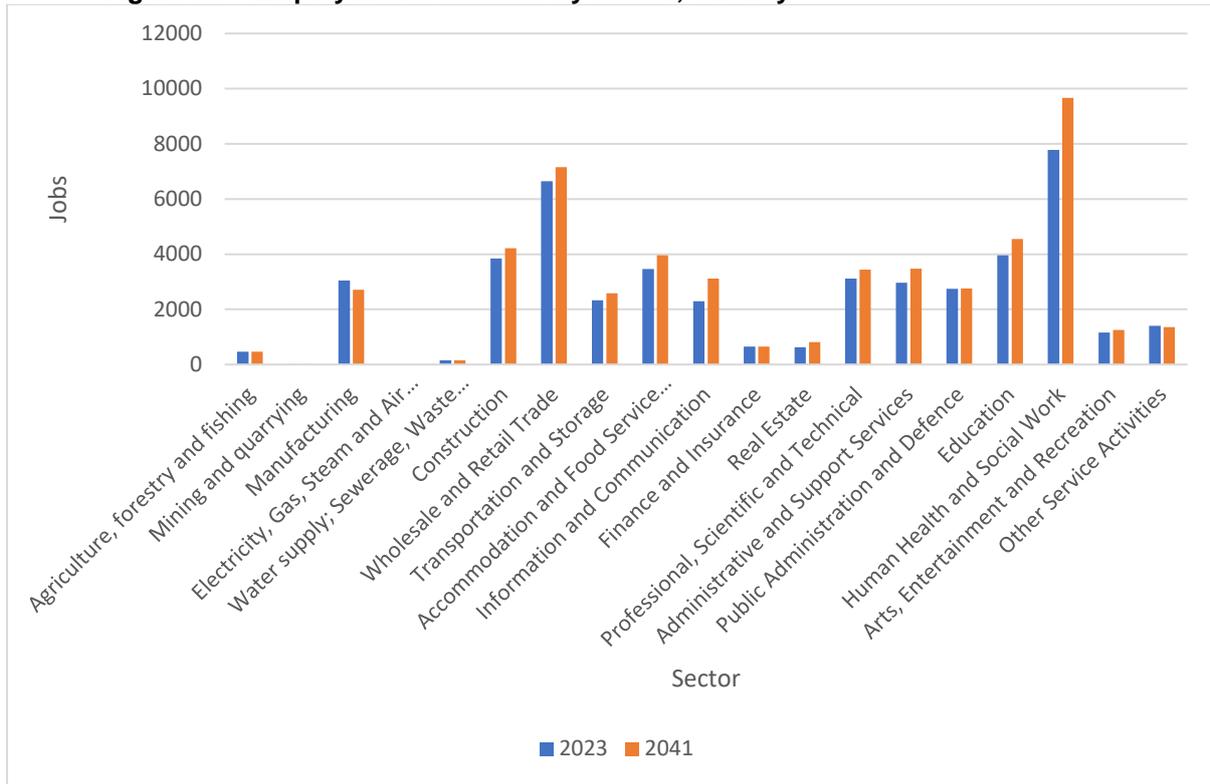
- 3.18 Work has been completed using forecasts provided by Cambridge Econometrics, from LCC in 2024. These are the latest available Cambridge forecasts and provide consistency with other evidence base research, as well as with other research work being completed across Lancashire at this time.

- 3.19 The baseline scenario considers the quantum of employment land required to support the jobs growth forecasted within the Cambridge Econometrics forecasts. The baseline scenario in the Cambridge forecast projects the following net growth, in Central Lancashire, over the revised CLLP period of 2023-2041 is:

- Chorley: 5,675 extra jobs
- Preston: 5,493 extra jobs
- South Ribble: 5,492 extra jobs
- *Central Lancashire Combined: 16,660 extra jobs.*

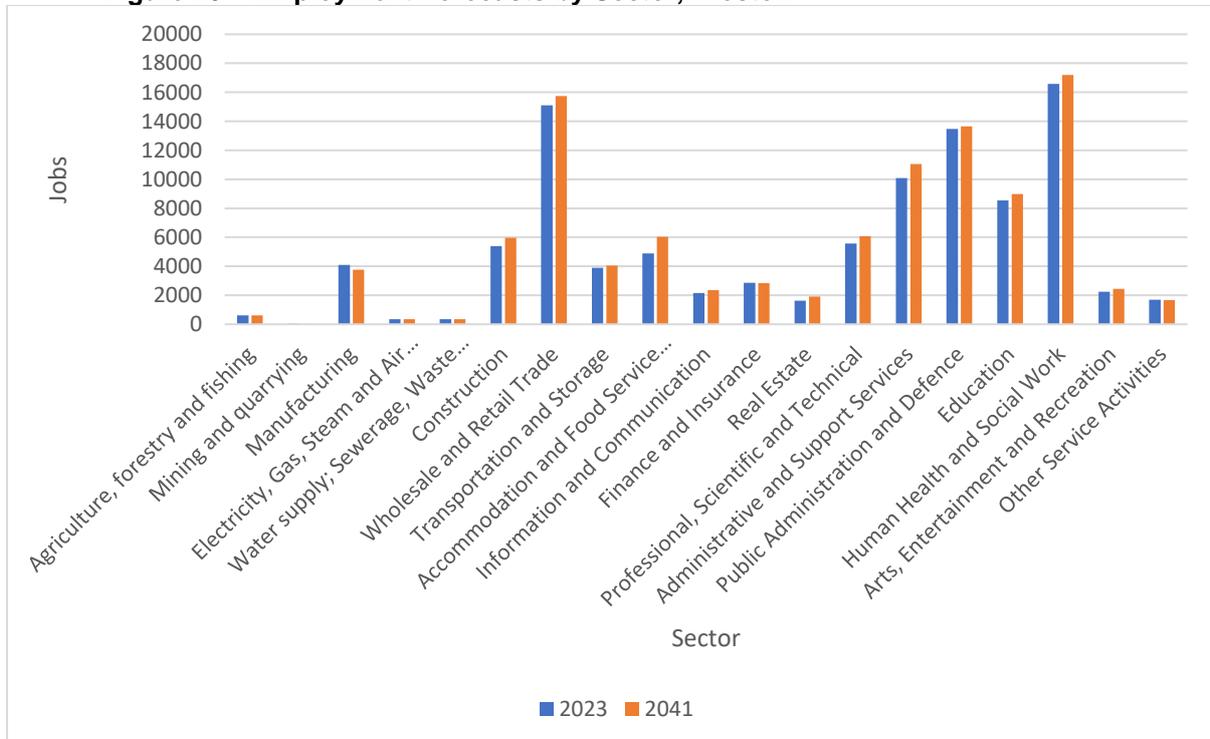
- 3.20 Figures 19 to 21 show the sectoral change, for the three local authorities over the revised CLLP period. The data is divided into 19 sectors, consistent with the 2022 Study. They show that the broad trends established in the 2022 ELS remain the same with growth projected in Construction (especially in South Ribble), Wholesale/Retail Trade, most office sectors and the public sector (especially Human Health and Social Work) jobs. All three local authority areas will see declines in manufacturing employment.

**Figure 19 – Employment Forecasts by Sector, Chorley**



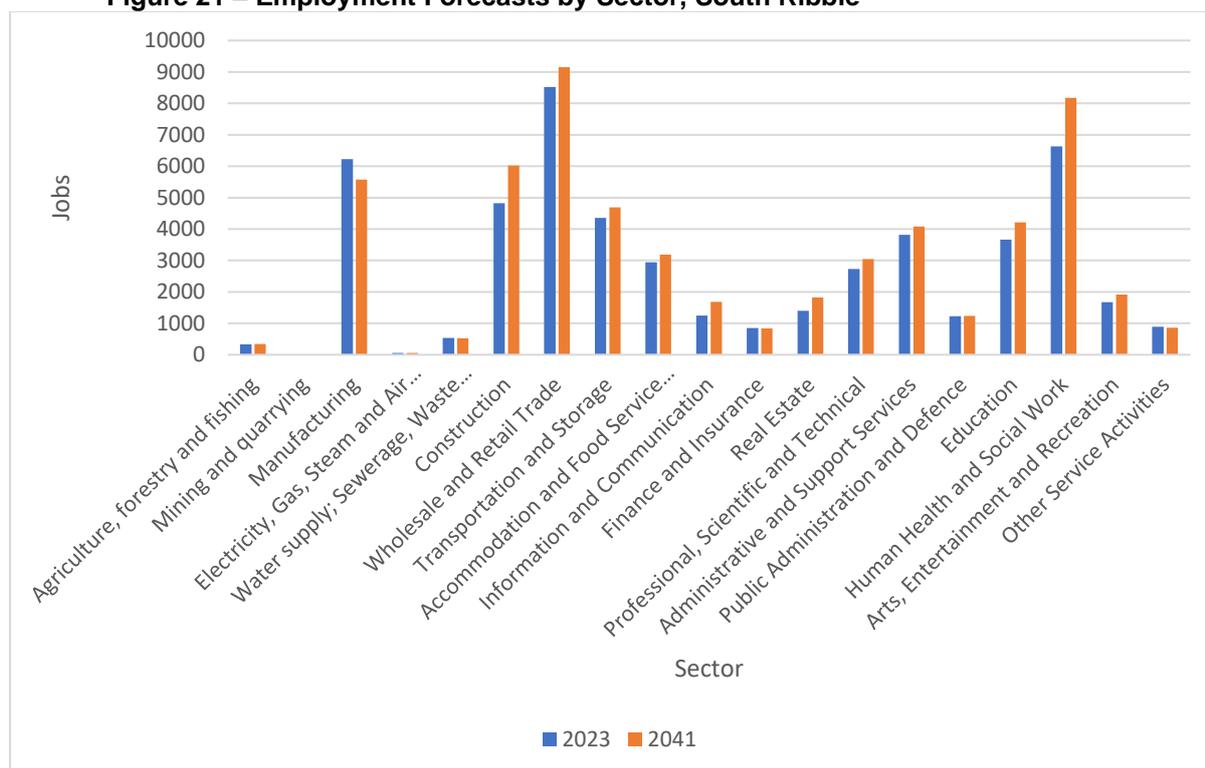
Source: Cambridge Econometrics, 2024

**Figure 20 – Employment Forecasts by Sector, Preston**



Source: Cambridge Econometrics, 2021

**Figure 21 – Employment Forecasts by Sector, South Ribble**



Source: Cambridge Econometrics, 2024

3.21 To use the figures provided in the forecasts, several adjustments must be made to allow for real world conditions. Firstly, an allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for Full Time Equivalent (FTE) <sup>1</sup> jobs by sector. This is achieved through an analysis of the proportion of full-time and part-time jobs in each sector in Central Lancashire as of 2022, using BRES data on the broad industrial sectors.

3.22 Tables 16 to 18 show the total employment change by sector projected by the Cambridge Econometrics forecast along with the conversion into FTE jobs. By forecast period the FTE jobs change for Central Lancashire is projected to be:

- Chorley: 3,788 extra jobs
- Preston: 3,533 extra jobs
- South Ribble: 3,790 extra jobs

<sup>1</sup> N.B. An FTE job is equal to the number of hours a full-time employee works for an organization. The concept is used to count “hours worked” rather than the number of employees to budget, forecast, staff and calculate wages for in an organisation. For example, if an organisation considers 40 hours per week as full-time and there are four employees who work 10 hours each per week, the hours for those four employees add up together to make 1.0 FTE job.

- *Central Lancashire Combined: 11,111 extra jobs.*

**Table 16 – Cambridge Econometrics Total FTE Jobs Change/Allowance for Homeworking by Sector by Sector – Chorley**

Cambridge Forecast Change - Employment by Industry	Total Change 2023-2041	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 71.0 percent for Homeworking
Agriculture, forestry and fishing	8	74.1	6	4
Mining and quarrying	-1	100	-1	-1
Manufacturing	-328	88.9	-292	-292
Electricity, Gas, Steam and Air Conditioning Supply	0	100	0	0
Water supply; Sewerage, Waste Management and Remediation Activities	-1	94.3	-1	-1
Construction	369	89.6	331	235
Wholesale and Retail Trade	505	61.2	309	309
Transportation and Storage	256	81.2	208	208
Accommodation and Food Service Activities	507	33.3	169	169
Information and Communication	814	88.9	724	514
Finance and Insurance	-6	81.8	-5	-3
Real Estate	188	64.7	122	86
Professional, Scientific and Technical	325	84.6	275	195
Administrative and Support Services	513	71.4	366	260
Public Administration and Defence	15	79.8	12	8
Education	588	56	329	329
Human Health and Social Work	1881	65.5	1232	1232
Arts, Entertainment and Recreation	94	36.7	34	34
Other Service Activities	-51	59.1	-30	-30
<b>Total</b>	<b>5,675</b>	<b>-</b>	<b>3,788</b>	<b>3,258</b>

Source: Cambridge Econometrics, 2024/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

**Table 17 – Cambridge Econometrics Total FTE Jobs Change/Allowance for Homeworking by Sector by Sector – Preston**

Cambridge Forecast Change - Employment by Industry	Total Change 2023-2041	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 75.1 percent for Homeworking
Agriculture, forestry and fishing	17	79.7	14	10
Mining and quarrying	-15	95.2	-14	-11
Manufacturing	-349	82.4	-288	-288

Electricity, Gas, Steam and Air Conditioning Supply	-17	94.1	-16	-12
Water supply; Sewerage, Waste Management and Remediation Activities	-3	96.4	-3	-2
Construction	576	90.9	524	393
Wholesale and Retail Trade	639	65.6	419	419
Transportation and Storage	148	90.2	133	133
Accommodation and Food Service Activities	1,147	36.6	420	420
Information and Communication	183	86.2	158	118
Finance and Insurance	-24	87.6	-21	-16
Real Estate	291	70.2	204	153
Professional, Scientific and Technical	520	82.4	428	322
Administrative and Support Services	967	71.4	690	519
Public Administration and Defence	187	75	140	105
Education	443	62.5	277	277
Human Health and Social Work	615	66.7	410	410
Arts, Entertainment and Recreation	200	37.5	75	75
Other Service Activities	-32	57.7	-18	-18
<b>Total</b>	<b>5,493</b>	<b>-</b>	<b>3,533</b>	<b>3,009</b>

Source: Cambridge Econometrics, 2021/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

**Table 18 – Cambridge Econometrics Total FTE Jobs Change/Allowance for Homeworking by Sector – South Ribble**

Cambridge Forecast Change - Employment by Industry	Total Change 2023-2041	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 71.2 percent for Homeworking
Agriculture, forestry and fishing	10	76.2	8	5
Mining and quarrying	0	100	0	0
Manufacturing	-653	93.8	-613	-613
Electricity, Gas, Steam and Air Conditioning Supply	-1	100	-1	-1
Water supply; Sewerage, Waste Management and Remediation Activities	-11	92	-10	-7
Construction	1,196	90.9	1,087	774
Wholesale and Retail Trade	629	62.9	396	396
Transportation and Storage	331	83.3	276	276
Accommodation and Food Service Activities	245	34.8	85	85
Information and Communication	427	86.2	368	262
Finance and Insurance	-7	84.2	-6	-4
Real Estate	425	84.6	360	256
Professional, Scientific and Technical	320	81.8	262	186

Administrative and Support Services	266	76.6	204	145
Public Administration and Defence	6	80.5	5	3
Education	556	53.8	299	299
Human Health and Social Work	1,542	63	971	971
Arts, Entertainment and Recreation	246	50	123	123
Other Service Activities	-34	68.8	-23	-23
<b>Total</b>	<b>5,492</b>	<b>-</b>	<b>3,790</b>	<b>3,135</b>

*Source: Cambridge Econometrics, 2021/ONS, 2022*

*\*Full time jobs, as a percentage of all jobs in BRES 2022 data.*

3.23 The second consideration is homeworking, which affects the number of new jobs which need to be accommodated in commercial premises, and therefore need employment land. The latest data on homeworking, by local authority area, is derived from the 2021 Census and as shown in Section 2.0, this identifies homeworking rates of:

- Chorley: 29.0 percent
- Preston: 24.9 percent
- South Ribble: 28.8 percent
- *Central Lancashire Combined: 27.4 percent.*

3.24 The 2021 Census does not split homeworking rates by business sector, but it can be assumed that, after the lockdowns associated with the Covid-19 Pandemic have ended at least, homeworking will primarily be found in office-based sectors.

3.25 Reducing the relevant, office-based, sectors by the above proportion, to exclude jobs which would be mostly home based, is also undertaken in Tables 16-18 and reduces the FTE employment growth to:

- Chorley: 3,258 extra jobs
- Preston: 3,009 extra jobs
- South Ribble: 3,135 extra jobs
- *Central Lancashire Combined: 9,401 extra jobs*

3.26 As noted in Section 2.0, 2021 Census data was collected at a time when the UK was still experiencing lockdowns associated with the Covid-19 Pandemic, it may therefore exaggerate present homeworking rates, much less homeworking levels moving forward to 2041. It was the view of stakeholders, contacted for this study, and other recent studies, that large scale homeworking and hybrid working continues to remain a key part of office sector working in Central Lancashire, but stakeholders could not

confirm what proportion of their staff now work mostly from home and what proportion work on a hybrid basis (i.e. partly from home, partly from the office). Hybrid workers will still require some office accommodation.

3.27 Given the uncertainties around present and future homeworking rates, two scenarios are shown below which illustrate premises and land needs, gross and net of a deduction for homeworking.

3.28 In terms of future employment land requirements, only certain sectors will translate jobs into a requirement for employment land. The model assesses what percentage of jobs in each sector translates to floorspace. For example, in transport and storage a percentage of jobs will be warehouse based, whilst the remainder will be drivers not operating on site. Thus, this model is likely to be affected by a number of key factors:

- The future mix of activities in respect of office, manufacturing and warehousing employment within different sectors. It is not possible to predict the impact of evolving technical change over the period to 2041, and we have therefore assumed that this mix will not change over the period
- The percentage of employees in each sector that will translate to floorspace. The proportion of people in each industry sector that occupy E(g), B2 or B8 space conforms to those ratios used in other studies and accepted in comparable locations and are sourced from the South East Regional Planning Conference's 'The Use of Business Space'
- The average space each employee occupies – the employment density. We have assumed no variation in the density rates through to 2041 and have used those densities identified in the HCA 2015 published Employment Densities Guide 3<sup>rd</sup> Edition. With changing work practices, the densities will vary, but in the absence of more locally sourced or up-to-date data (including post-pandemic workplace practices) this industry accepted data is used
- The average development floorspace per hectare for office, manufacturing and warehousing activities. We have applied the uniform amount of 4,000 sqm per hectare for the OAN calculations for Central Lancashire. This is a standard density for development in business park and industrial estate settings where the bulk of new development is likely to occur.

3.29 These assumptions are summarised in Table 19.

**Table 19 – Model Assumptions**

Industry Sector	Employees		
	Percentage of Staff Occupying E(g), B2, B8 Floorspace (percent)	Floorspace Occupied per Person (sqm)	Other Comments
Agriculture/Mining	5	14	The 5 percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Manufacturing	100	36	The bulk of past industrial take up, across Central Lancashire, has been for B2 general industrial space. It is therefore assumed that most future growth in premises to accommodate manufacturing businesses will be for B2 industrial units with an average of 36 sqm/job.
Utilities	26	14	The 26 percent will comprise managerial, admin, thus B1(a) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Construction	26	14	The 26 percent will comprise managerial, admin, thus E(g)(i) office space. This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Wholesale and Retail	5	70	It is assumed that 5 percent of this employment is within the Wholesale sector within industrial areas. A job density of 70 sqm per job has been applied, equivalent to that of a 'Final Mile' Distribution Centre.
Transport and Distribution	48	70	Warehouses, offices. Central Lancashire includes some strategic motorway linked sites, where Regional and National B8 Distribution Centres might be built. However, across the sub-region more generally, most B8 premises built is likely to comprise more locally focused 'Final Mile' Distribution Centres, with an average gross external area of 70 sqm/job.
Private office sectors e.g., Financial and Legal, Professional Services	100	14	This office space assumes an average of 14 sqm of gross external area per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.
Government and Other Services	22	14	Local Government, Public Administration for E(g)(i) offices. This office space assumes an average of 14 sqm of gross external area per employee based on a

Industry Sector	Employees		
	Percentage of Staff Occupying E(g), B2, B8 Floorspace (percent)	Floorspace Occupied per Person (sqm)	Other Comments
			blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20 percent higher than the net internal area.

Source: SERPLAN and Homes England, 2015

- 3.30 Using the adjustments shown in Table 19, the net job figure for each sector is calculated to reflect the proportion of jobs occupying 'E(g) or B' floorspace. That figure is then multiplied by the floorspace per person to give total floorspace for each sector.
- 3.31 Once a total floorspace is calculated, the sqm figures are then translated to a land requirement using the identified ratios. The calculations are provided at Appendix 2 Table 20 shows the resulting land needs, by use.

**Table 20 – Forecast Outputs, Hectares**

Use	Chorley	Preston	South Ribble
<b>Gross of Homeworking</b>			
Office (inc. Research and Development) Land Need	6.7	6.2	6.1
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>6.1</b>	<b>5.1</b>	<b>3.3</b>
<b>Net of Homeworking</b>			
Office (inc. Research and Development) Land Need	5.1	4.8	4.6
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>4.5</b>	<b>3.7</b>	<b>1.8</b>

Source: BE Group, 2024

- 3.32 However, the net outputs are severely limited by the large declines in manufacturing employment predicted in the models. Even if this decrease does occur as forecast, there is no reason to assume that a decline in employment will lead to a significant loss of employment land. Experience suggests that even where businesses are contracting, in labour terms, they will continue to hold onto sites in anticipation of future

improvement and change. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate and can lead to higher productivity and growth.

3.33 Thus, there is a case for looking at the land need resulting from sectors predicted to grow only, i.e. just the office and warehouse need from Table 20 above This gives needs of:

#### **Chorley**

- Gross of Homeworking – 8.7 ha
- Net of Homeworking – 7.1 ha.

#### **Preston**

- Gross of Homeworking – 7.7 ha
- Net of Homeworking – 6.3 ha.

#### **South Ribble**

- Gross of Homeworking – 8.8 ha
- Net of Homeworking – 7.3 ha.

#### **Summary of Central Lancashire OAN and Further Adjustments**

3.34 This Section has undertaken Past Take-Up and Labour Demand modelling to consider the OAN for Central Lancashire. The findings are summarised in Tables 21 to 22.

3.35 Clearly there are substantial differences in the outputs of the different models. These are most pronounced in relation to industrial needs where the Labour Demand forecasts indicate a decline in manufacturing OAN while the completions trends, identified local pipeline of development and market analysis suggest reasonable growth. Before consideration of a preferred model, further adjustments are made as below to allow the models to better reflect real world conditions.

**Table 21– Central Lancashire OAN Projections – Past Take Up Model, Hectares**

Use	Chorley			Preston			South Ribble		
	Historic Take-Up 2010/11-2021/23	Average Take Up Rate, Ha/year	OAN Need 2023-2041 (x19 years)	Historic Take-Up 2010/11-2023/24	Average Take Up Rate, Ha/year	OAN Need 2023-2041 (x19 years)	Historic Take-Up 2010/11-2023/24	Average Take Up Rate, Ha/year	OAN Need 2023-2041 (x19 years)
<b>Gross of Losses</b>									
Office (inc. Research and Development and Mixed E(g) Take up) Land Need	6.52	0.50	<b>9.53</b>	3.31	0.25	<b>4.84</b>	8.91	0.69	<b>13.02</b>
Industrial (Inc. Light Industry and Mixed Use) Land Need	24.7	1.90	<b>36.10</b>	11.31	0.87	<b>16.53</b>	19.31	1.49	<b>28.22</b>
Warehouse Land Need	6.58	0.51	<b>9.62</b>	19.34	1.49	<b>28.27</b>	23.24	1.79	<b>33.97</b>
<b>Total</b>	37.81	2.91	<b>55.26</b>	33.96	2.61	<b>49.63</b>	51.46	3.96	<b>75.21</b>
<b>Net of Losses</b>									
Office (inc. Research and Development and Mixed E(g) Take up) Land Need	-2.57	-0.20	<b>-3.76</b>	1.91	0.15	<b>2.79</b>	5.25	0.40	<b>7.67</b>
Industrial (Inc. Light Industry and Mixed Use) Land Need	9.25	0.71	<b>13.52</b>	5.8	0.45	<b>8.48</b>	2.33*	0.18	<b>3.41</b>
Warehouse Land Need	4.17	0.32	<b>6.09</b>	18.37	1.41	<b>26.85</b>	16.34	1.26	<b>23.88</b>
<b>Total</b>	10.86	0.84	<b>15.87</b>	26.08	2.01	<b>38.12</b>	23.92	1.84	<b>34.96</b>

Source: BE Group, 2024

\*Excludes the exceptional 2017-2018 loss. Including it adds a further 54.17 ha to the B2 losses figures, i.e. -51.84 ha or -3.99 ha/year = OAN need of -75.81 ha over 2023-2041.

**Table 22 – Central Lancashire OAN Projections – Labour Demand Models, Hectares**

Use	Chorley	Preston	South Ribble
<b>Gross of Homeworking</b>			
Office (inc. Research and Development) Land Need	6.7	6.2	6.1
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>6.1</b>	<b>5.1</b>	<b>3.3</b>
<b>Net of Homeworking</b>			
Office (inc. Research and Development) Land Need	5.1	4.8	4.6
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>4.5</b>	<b>3.7</b>	<b>1.8</b>

Source: BE Group, 2024

### **Further Adjustments**

- 3.36 To provide an indication of the final need for employment land, it is appropriate to make some allowance for frictional vacancy within employment floorspace and to provide some margin within the supply of land to provide a choice of sites.

### *Vacancy*

- 3.37 It is widely accepted that 5-10 percent vacancy is required at all times in commercial markets. A level of vacant floorspace is necessary to ensure churn and choice for companies, allowing innovation, inward investment, resizing of existing business requirements and refurbishments. BE Group have therefore assumed a need to achieve a 7.5 percent vacancy rate within the local stock, a mid-point between 5-10 percent, to achieve a well-functioning commercial property market.
- 3.38 Utilising the vacancy information in Section 2.0, and VOA data on the total stock of industrial premises in each local authority area, the following vacancy rates can be identified:
- Chorley: 1,130 units total comprising 603,000 sqm. There were 20 available units in Chorley totalling 8,135 sqm. This equates to a vacancy rate of 1.8 percent by units, 1.3 percent by floorspace.
  - Preston: 2,100 units total comprising 943,000 sqm. There were 18 available units in Preston totalling 23,339 sqm. This equates to a vacancy rate of 0.9 percent by units, 2.5 percent by floorspace.

- South Ribble: 1,190 units total comprising 1,111,000 sqm. There were 20 available units in South Ribble totalling 16,337 sqm. This equates to a vacancy rate of 1.7 percent by units, 1.5 percent by floorspace.

3.39 These vacancy rates are clearly well below the 7.5 percent considered desirable to provide choice for businesses. Table 23 shows the additional floorspace and land which would be needed to achieve local vacancy rates of 7.5 percent in the industrial/warehouse stock, i.e. an overall additional requirement of 37.80 ha across the Central Lancashire, somewhat focused in South Ribble. A further allowance to increase vacancy in the office market is not considered necessary given uncertainties around office demand post the Covid-19 Pandemic and the difficulties in viably delivering private sector office stock, i.e. such an adjustment would likely over inflate need and the extra OAN could be hard to deliver.

**Table 23 – Allowance for Industrial/Warehouse Vacancy**

Local Authority Area	Total Industrial/Warehouse Floorspace, sqm	2023 Vacancy Rates, Percent	2023 Vacancy Rates, Floorspace*	Additional Floorspace Needed to Achieve 7.5 percent Vacancy, Sqm	Additional Land Needed, to Achieve 7.5 percent Vacancy, ha**
Chorley	603,000	1.3	8,135	37,386	9.35
Preston	943,000	2.5	23,339	47,150	11.79
South Ribble	1,111,000	1.5	16,337	66,660	16.67
<b>Total/Average</b>	<b>2,657,000</b>	<b>5.3</b>	<b>47,811</b>	<b>151,196</b>	<b>37.80</b>

Source: VOA and BE Group, 2023

\*Vacant and marketed as of Summer 2023

\*\*Assumes 4,000 sqm/hectare

#### *Displacement*

3.40 It also needs to be considered if there is a need to allow for ‘Displacement’ in Central Lancashire. This refers to major redevelopment projects that will displace existing office, industrial or warehouse businesses, companies that will need to be relocated locally, generating land and premises requirements additional to baseline OAN. At this time there are no strategic projects, in Chorley, Preston or South Ribble, which are likely to displace large numbers of local firms. Major schemes, such as the Cuerden Strategic Site (Lancashire Central) are proposed on greenfield land, or at least empty brownfield land, only.

*Buffer*

- 3.41 A buffer in supply should be applied to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the forecast period. This makes some allowance for the exceptional loss of further employment land to non E(g)/B-Class uses, over and above, that already allowed for. It also allows for increasing difficulty in monitoring losses moving forward as changes of use, away from E(g), B2, B8 uses, increasingly occur via the enhanced permitted development rights available under the 2020 Use Classes Order.
- 3.42 There is no set guidance on how long this buffer should be. However, in over 70 employment land studies completed by BE Group over the last 20 years, including all past work in Central Lancashire, a buffer of 5 years has usually been applied.
- 3.43 A 5-year buffer has been identified as an acceptable margin in Local Plan Examinations in Public (EIPs), in which BE Group's employment land reviews have been appraised. For example, in the EIP for Sefton, the 'Report on the Examination into Sefton Local Plan' by Inspector Martin Pike (14<sup>th</sup> March 2017), relating to BE Group's Sefton Employment Land and Premises Study Update (2015) stated that: "*The buffer has been calculated on a consistent basis and I accept that an additional 5 years' supply is reasonable to provide flexibility and choice in the employment land market.*" [Paragraph 113, Page 30]. The Local Plan was found sound with modifications and adopted 20<sup>th</sup> April 2017.

*Replacement Demand*

- 3.44 In the Past Take Up Model it is important to note the difference between gross and net completions. Gross Take Up includes all recorded completions for relevant floorspace and land. Net Take Up deducts from these gains all recorded losses of E(g)/B-Class floorspace/land to provide a net figure of future need.
- 3.45 Many employment land studies consider whether there is a need to make an allowance for replacing future losses that may follow past patterns, or to compensate for past losses. They may therefore apply Gross Take Up figures which would assume that all losses need to be replaced with new development over the forecast period.

- 3.46 However, not all losses automatically need to be replaced. While some losses may solely reflect the desire of landowners to convert sites/buildings to higher value uses, the properties lost may also be of a specification, quality, tenure or in a location that is no longer desired by the market.
- 3.47 In the case of Preston, a key issue will be the loss of office stock, in and around the City Centre. Available monitoring data indicates that between 2016 and 2023, the City Centre lost 20,081 sqm (or 18,851 sqm net of gains). Schemes under construction as of April 2023 would lead to the loss of another 4,208 sqm (gross) while consented, but not commenced, schemes would lead to the loss of another 4,903 sqm (gross). VOA data suggests that since 2015, the stock of offices across Preston District, has reduced by 69,000 sqm or 7.5 percent, to 322,000 sqm in 2023.
- 3.48 Enhanced Permitted Development Rights mean that the rate of losses is unlikely to decrease moving forward, reducing the scale and range of the office market offer in Preston, Lancashire's most significant centre for services. At the same time, VOA data indicates that industrial stock in Preston reduced by 48,000 sqm, or 5.1 percent, over 2016-2023, to 943,000 sqm. While some of this lost stock will have been surplus to market needs, given the scale of these losses, and the likely economic impacts resulting, it is recommended that Gross Take Up figures be applied. This assumes that the city should seek to replace as much of this lost stock as possible to maintain the range and quality of its offer to businesses.
- 3.49 Some of these issues will also apply in Chorley and South Ribble but appear to do so to a far smaller degree. VOA data suggests that, since 2015 at least, the office stock in the two locations has, with some fluctuation, remained broadly static. By comparison Chorley has gained 23,000 sqm of industrial stock over the same period, a 4.8 percent increase, to 603,000 sqm. South Ribble lost a comparatively modest 16,000 sqm of industrial stock over the same period or a 1.4 percent reduction.
- 3.50 Thus, neither Chorley or South Ribble appears to be losing stock at anything like the rate of Preston, and indeed Chorley is gaining industrial stock, with further industrial/warehouse schemes under construction or in the pipeline here. Experience, across multiple Employment Land studies completed by BE Group since 2017 suggests that neither local authority area has particular problem with large amounts of vacant and surplus stock, as demonstrated by the low vacancy rates discussed above. Thus, it is likely that if the individual buildings recorded lost in the above Take Up data,

for Chorley and South Ribble, were still needed by the market, they would have been occupied.

- 3.51 Reflecting this, it is the view of this Study that Net Take Up rates should be applied in the case of Chorley and South Ribble, assuming that day to day losses do not need to be replaced. In taking this view it should be noted that the 5 year buffer, applied above, makes some allowance for exceptional losses, which fall outside regular patterns of change.
- 3.52 In the case of South Ribble, the applied Net Take Up rates should exclude the 54.17 ha recorded loss of 2017-2018, which skews all figures heavily into the negative. This implies that South Ribble needs far less employment land than it already has, something which is contrary to all the other findings of this Study. The scale of this loss is also exceptional, both in South Ribble and across Central Lancashire more generally.
- 3.53 ***The above assumptions will be applied to the preferred OAN Models, discussed below.***

### **Recommended Models**

- 3.54 **Office OAN:** Experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate, something broadly demonstrated by the comparisons between past jobs growth and past take up, discussed above. The jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward. In this regard, it allows linkages to be made between employment land and housing needs as the latter will also be informed, at least in part, by forecasts of jobs change.
- 3.55 In terms of Preston, it is accepted that using the Labour Demand model for office OAN does not fully account for the loss of office premises in central Preston. However, that is arguably true of the Take Up Modelling, which is based on completions from the EP1 Employment Areas only. Labour Demand modelling at least uses data for the whole local authority area rather than being limited to the main Employment Areas. Additionally, the 5 year buffer is relied upon here to provide a degree of flexibility to

account for losses of office space in the City while also providing space to accommodate the forecast future growth in the workforce, which is projected to be mostly in sectors requiring E(g)(i) accommodation. A larger office OAN may also prove hard to deliver given ongoing constraints in viably developing new office stock, as noted in Section 2.0.

- 3.56 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. This, together with the current viability issues associated with office development, suggests office take up will take place at a structurally lower rate than the past take up model would suggest. While it is not possible to say exactly how working practices will evolve to 2041, Labour Demand models net of homeworking are more realistic at this time. Thus, the recommended office sector OAN is set out in Table 24, including the assumptions applied.

**Table 24 – Recommended OAN for Offices**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	6.48	Labour Demand, net of homeworking Inclusive of Buffer equating to an extra 5 years
Preston	6.00	
South Ribble	5.76	
<b>Total</b>	<b>18.24</b>	

Source: BE Group, 2024

- 3.57 **Industrial and Warehouse OAN:** It should first be noted that industrial and warehouse needs can be linked together as, at the local scale at least, demand for industrial/warehouse space is frequently interchangeable, particularly on industrial estates where outline consents are usually for general B Class Units, with the ultimate use determined by the occupier.
- 3.58 As referenced above, requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in

times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices, again as illustrated by analyses above. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.

3.59 Here therefore the Past Take Up model is recommended as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2010/2011, allowing that such economic growth and decline will continue to 2041. It is thus likely to be better in tune with real market demand than the Labour Demand model. As office sector need has already been accounted for, the industrial and warehouse sector OAN excludes office provision, to avoid double provision. Thus, the recommended industrial/warehouse OAN is set out in Table 25, including the assumptions applied.

**Table 25 – Recommended OAN for Industrial/Warehouse**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	34.97	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 19.61 ha A further Buffer of 5 years is applied on the Baseline figure An additional 9.35 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
Preston	68.43	Baseline in the Take Up modelling, Gross of Losses (to provide allowance for the scale of industrial/warehouse losses recorded), for Industrial/Warehouse Uses only = 44.80 ha A further Buffer of 5 years is applied on the Baseline figure An additional 11.79 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
South Ribble	51.23	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 27.29 ha A further Buffer of 5 years is applied on the Baseline figure An additional 16.67 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
<b>Total</b>	<b>154.63</b>	

Source: BE Group, 2024

3.60 **The combined OAN, linking office and industrial/warehouse needs, is therefore:**

- **Chorley – 41.45 ha**
- **Preston – 74.43 ha**
- **South Ribble – 56.99 ha**
- **Central Lancashire combined – 172.87 ha.**

- 3.61 This OAN calculation produces a need level some 52 ha lower than that in the 2022 ELS, when a Central Lancashire OAN of 225.06 ha was identified. The main need reductions are for Chorley (from a 2022 OAN of 76.34 ha) and South Ribble (from a 2022 OAN of 77.66 ha). By comparison, need in Preston increases slightly (from a 2022 OAN of 71.06 ha). **However, it is important to emphasise that this Study has used a differing methodology for calculating the OAN, to previous research, to a differing forecast period. The figures given here are thus not directly comparable to those in past Central Lancashire ELS studies.**
- 3.62 The OAN of 172.87ha from this study can however be compared to the supply picture from the 2022 ELS, when Central Lancashire’s stock of available employment was identified to be 190.78 ha, comprising:
- Chorley: 56.28 ha
  - Preston: 82.52 ha – Comprising 71.31 ha in EP1 allocations and another 11.21 ha in ELR sites which were excluded from the 2017 Study, which could provide further growth options (0.66 ha of these ELR sites fall in the City Centre Boundary, as defined in the Local Plan, all fall outside of EP2 Employment Areas)
  - South Ribble: 51.98 ha.
- 3.63 By this measure Chorley would have had sufficient land to meet its needs while South Ribble would have had a modest shortfall of some 5 ha (although this supply figure assumed that none of the Cuerden Strategic Site (Lancashire Central) was counted as local supply for South Ribble, clearly adding it in would more than meet needs). Preston would also have had some shortfall if only its EP1 allocations were counted. However, it is acknowledged that these supply figures are now over two years old and some of this stock of land has since been taken up. As will be discussed in Section 4.0, however, the SHELAA/Call for Sites exercises have put forward provide ample potential further employment land to meet the identified OANs.

### **Model 3: Labour Supply**

- 3.64 As part of the CLLP development process, consultants supporting the three Councils have identified an ‘Employment-led’ population growth scenario for Central Lancashire. There are two variations of this, one using a fixed 2011 Census commuting ratio (Employment-led) and the second using an adjusted 2011 Census ratio (Employment-led (CR 1-to-1)). In the CR 1-to-1 scenario, the 2011 commuting ratio has been adjusted in each year of the forecast so that future jobs growth is provided for under a 1:1

commuting ratio. These scenarios will inform assessments of housing need in the CLLP.

3.65 The Scenario provides estimates on numbers employed, allowing for commuting, and how those numbers will change to 2041 (see Table 26).

**Table 26 – Employment-led’ Population Growth Scenarios – Employment Change 2023-2041**

Area	Scenario	Total Employed, 2023	Total Employed, 2041	Change 2023-2041
Chorley	Employment-led	58,245	65,307	7,061
	Employment-led (CR 1-to-1)	58,245	63,729	5,483
Preston	Employment-led	70,269	74,181	3,912
	Employment-led (CR 1-to-1)	70,269	75,577	5,308
South Ribble	Employment-led	55,906	61,937	6,031
	Employment-led (CR 1-to-1)	55,906	61,213	5,307
<b>Central Lancashire Totals</b>	<b>Employment-led</b>	<b>184,421</b>	<b>201,425</b>	<b>17,004</b>
	<b>Employment-led (CR 1-to-1)</b>	<b>184,421</b>	<b>200,519</b>	<b>16,098</b>

Source: CBC, PCC, SRBC, 2024

3.66 It is possible to apply a similar methodology used for Model 2: Labour Demand to the Resident Workforce jobs growth figures. To do this the jobs growth figures need to be split by business sector. This is done by applying the same proportional split of sectors as the Cambridge Econometrics jobs forecast for the end of the CLLP Period, i.e. 2041. The employment is also changed to FTE jobs and an allowance made for homeworking, as shown in Tables 27-32.

**Table 27 – Employment-led’ Population Growth Scenarios, FTE Jobs/Homeworking Change by Sector – Chorley, Employment-led**

Sector	Proportion of Jobs by Sector, as of 2041, Percent (From Cambridge Forecasts)	Employment-led Scenario. Jobs Change 2023-2041, Split by Sector	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 71.0 percent for Homeworking
Agriculture, forestry and fishing	0.9	64	74.1	47	33
Mining and quarrying	0	0	100	0	0
Manufacturing	5.2	367	88.9	326	326
Electricity, Gas, Steam and Air Conditioning Supply	0	0	100	0	0

Water supply; Sewerage, Waste Management and Remediation Activities	0.3	21	94.3	20	14
Construction	8.1	572	89.6	512	364
Wholesale and Retail Trade	13.7	967	61.2	592	592
Transportation and Storage	4.9	346	81.2	281	281
Accommodation and Food Service Activities	7.6	537	33.3	179	179
Information and Communication	5.9	417	88.9	370	263
Finance and Insurance	1.2	85	81.8	69	49
Real Estate	1.6	113	64.7	73	52
Professional, Scientific and Technical	6.6	466	84.6	394	280
Administrative and Support Services	6.6	466	71.4	333	236
Public Administration and Defence	5.3	374	79.8	299	212
Education	8.7	614	56	344	344
Human Health and Social Work	18.5	1306	65.5	856	856
Arts, Entertainment and Recreation	2.4	169	36.7	62	62
Other Service Activities	2.5	177	59.1	104	104
<b>Total</b>	<b>100.0</b>	<b>7,061</b>	<b>-</b>	<b>4,862</b>	<b>4,248</b>

Source: CBC/Cambridge Econometrics, 2024/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

**Table 28 – Employment-led' Population Growth Scenarios, FTE Jobs/Homeworking Change by Sector – Chorley, Employment-led (CR 1-to-1)**

Sector	Proportion of Jobs by Sector, as of 2041, Percent (From Cambridge Forecasts)	Employment-led Scenario (CR 1-to-1). Jobs Change 2023-2041, Split by Sector	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 71.0 percent for Homeworking
Agriculture, forestry and fishing	0.9	49	74.1	37	26
Mining and quarrying	0	0	100	0	0
Manufacturing	5.2	285	88.9	253	253
Electricity, Gas, Steam and Air Conditioning Supply	0	0	100	0	0
Water supply; Sewerage, Waste Management and Remediation Activities	0.3	16	94.3	16	11
Construction	8.1	444	89.6	398	283
Wholesale and Retail Trade	13.7	751	61.2	460	460
Transportation and Storage	4.9	269	81.2	218	218
Accommodation and Food Service Activities	7.6	417	33.3	139	139
Information and Communication	5.9	323	88.9	288	204
Finance and Insurance	1.2	66	81.8	54	38
Real Estate	1.6	88	64.7	57	40

Professional, Scientific and Technical	6.6	362	84.6	306	217
Administrative and Support Services	6.6	362	71.4	258	183
Public Administration and Defence	5.3	291	79.8	232	165
Education	8.7	477	56	267	267
Human Health and Social Work	18.5	1014	65.5	664	664
Arts, Entertainment and Recreation	2.4	132	36.7	48	48
Other Service Activities	2.5	137	59.1	81	81
<b>Total</b>	<b>100.0</b>	<b>5,483</b>	-	<b>3,776</b>	<b>3,299</b>

Source: CBC/Cambridge Econometrics, 2024/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

**Table 29 – Employment-led' Population Growth Scenarios, FTE Jobs/Homeworking Change by Sector – Preston, Employment-led**

Sector	Proportion of Jobs by Sector, as of 2041, Percent (From Cambridge Forecasts)	Employment-led Scenario. Jobs Change 2023-2041, Split by Sector	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 75.1 percent for Homeworking
Agriculture, forestry and fishing	0.6	23	74.1	17	13
Mining and quarrying	0	0	100	0	0
Manufacturing	3.6	141	88.9	125	125
Electricity, Gas, Steam and Air Conditioning Supply	0.3	12	100	12	9
Water supply; Sewerage, Waste Management and Remediation Activities	0.3	12	94.3	11	8
Construction	5.7	223	89.6	200	150
Wholesale and Retail Trade	15	587	61.2	359	359
Transportation and Storage	3.9	153	81.2	124	124
Accommodation and Food Service Activities	5.7	223	33.3	74	74
Information and Communication	2.2	86	88.9	77	57
Finance and Insurance	2.7	106	81.8	86	65
Real Estate	1.8	70	64.7	46	34
Professional, Scientific and Technical	5.8	227	84.6	192	144
Administrative and Support Services	10.5	411	71.4	293	220
Public Administration and Defence	13	509	79.8	406	305
Education	8.6	336	56	188	188
Human Health and Social Work	16.4	642	65.5	420	420
Arts, Entertainment and Recreation	2.3	90	36.7	33	33
Other Service Activities	1.6	63	59.1	37	37
<b>Total</b>	<b>100.0</b>	<b>3,912</b>	-	<b>2,701</b>	<b>2,367</b>

Source: PCC/Cambridge Econometrics, 2024/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

**Table 30 – Employment-led' Population Growth Scenarios, FTE Jobs/Homeworking Change by Sector – Preston, Employment-led (CR 1-to-1)**

Sector	Proportion of Jobs by Sector, as of 2041, Percent (From Cambridge Forecasts)	Employment-led Scenario (CR 1-to-1). Jobs Change 2023-2041, Split by Sector	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 75.1 percent for Homeworking
Agriculture, forestry and fishing	0.6	32	74.1	24	18
Mining and quarrying	0	0	100	0	0
Manufacturing	3.6	191	88.9	170	170
Electricity, Gas, Steam and Air Conditioning Supply	0.3	16	100	16	12
Water supply; Sewerage, Waste Management and Remediation Activities	0.3	16	94.3	15	11
Construction	5.7	303	89.6	271	204
Wholesale and Retail Trade	15	796	61.2	487	487
Transportation and Storage	3.9	207	81.2	168	168
Accommodation and Food Service Activities	5.7	303	33.3	101	101
Information and Communication	2.2	117	88.9	104	78
Finance and Insurance	2.7	143	81.8	117	88
Real Estate	1.8	96	64.7	62	46
Professional, Scientific and Technical	5.8	308	84.6	260	196
Administrative and Support Services	10.5	557	71.4	398	299
Public Administration and Defence	13	690	79.8	551	414
Education	8.6	456	56	256	256
Human Health and Social Work	16.4	871	65.5	570	570
Arts, Entertainment and Recreation	2.3	122	36.7	45	45
Other Service Activities	1.6	85	59.1	50	50
<b>Total</b>	<b>100.0</b>	<b>5,308</b>	<b>-</b>	<b>3,664</b>	<b>3,212</b>

Source: PCC/Cambridge Econometrics, 2024/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

**Table 31 – Employment-led’ Population Growth Scenarios, FTE Jobs/Homeworking Change by Sector – South Ribble, Employment-led**

Sector	Proportion of Jobs by Sector, as of 2041, Percent (From Cambridge Forecasts)	Employment-led Scenario. Jobs Change 2023-2041, Split by Sector	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 71.2 percent for Homeworking
Agriculture, forestry and fishing	0.6	36	74.1	27	19
Mining and quarrying	0	0	100	0	0
Manufacturing	9.7	585	88.9	520	520
Electricity, Gas, Steam and Air Conditioning Supply	0.1	6	100	6	4
Water supply; Sewerage, Waste Management and Remediation Activities	0.9	54	94.3	51	36
Construction	10.5	633	89.6	567	404
Wholesale and Retail Trade	15.9	959	61.2	587	587
Transportation and Storage	8.2	495	81.2	402	402
Accommodation and Food Service Activities	5.5	332	33.3	110	110
Information and Communication	2.9	175	88.9	155	111
Finance and Insurance	1.5	90	81.8	74	53
Real Estate	3.2	193	64.7	125	89
Professional, Scientific and Technical	5.3	320	84.6	270	193
Administrative and Support Services	7.1	428	71.4	306	218
Public Administration and Defence	2.2	133	79.8	106	75
Education	7.3	440	56	247	247
Human Health and Social Work	14.2	856	65.5	561	561
Arts, Entertainment and Recreation	3.3	199	36.7	73	73
Other Service Activities	1.6	96	59.1	57	57
<b>Total</b>	<b>100.0</b>	<b>6,031</b>	<b>-</b>	<b>4,244</b>	<b>3,758</b>

Source: SRBC/Cambridge Econometrics, 2024/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

**Table 32 – Employment-led’ Population Growth Scenarios, FTE Jobs/Homeworking Change by Sector – South Ribble, Employment-led (CR 1-to-1)**

Sector	Proportion of Jobs by Sector, as of 2041, Percent (From Cambridge Forecasts)	Employment-led Scenario (CR 1-to-1). Jobs Change 2023-2041, Split by Sector	Percentage of Total Jobs likely to be FTE*	FTE Jobs Change 2023-2041	Relevant Sectors Reduced to 71.2 percent for Homeworking
Agriculture, forestry and fishing	0.6	32	74.1	24	17
Mining and quarrying	0	0	100	0	0
Manufacturing	9.7	515	88.9	458	458

Electricity, Gas, Steam and Air Conditioning Supply	0.1	5	100	5	4
Water supply; Sewerage, Waste Management and Remediation Activities	0.9	48	94.3	45	32
Construction	10.5	557	89.6	499	355
Wholesale and Retail Trade	15.9	844	61.2	516	516
Transportation and Storage	8.2	435	81.2	353	353
Accommodation and Food Service Activities	5.5	292	33.3	97	97
Information and Communication	2.9	154	88.9	137	97
Finance and Insurance	1.5	80	81.8	65	46
Real Estate	3.2	170	64.7	110	78
Professional, Scientific and Technical	5.3	281	84.6	238	169
Administrative and Support Services	7.1	377	71.4	269	192
Public Administration and Defence	2.2	117	79.8	93	66
Education	7.3	387	56	217	217
Human Health and Social Work	14.2	754	65.5	494	494
Arts, Entertainment and Recreation	3.3	175	36.7	64	64
Other Service Activities	1.6	85	59.1	50	50
<b>Total</b>	<b>100</b>	<b>5,307</b>	<b>-</b>	<b>3,735</b>	<b>3,307</b>

Source: SRBC/Cambridge Econometrics, 2024/ONS, 2022

\*Full time jobs, as a percentage of all jobs in BRES 2022 data.

3.67 The resulting FTE jobs figures, with or without an allowance for homeworking, can then be converted into an employment land need using the same method as Model 2. The Tables for these calculations can be found in Appendix 2. The outputs from the Labour Supply Model are summarised in Tables 33 to 35.

**Table 33 – Chorley OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	6.0	4.6
Industrial Land Need	2.9	2.3
Warehouse Land Need	2.9	2.2
<b>Total Land Need</b>	<b>11.8</b>	<b>9.1</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	4.5	4.6
Industrial Land Need	2.9	2.3

Use	Employment-led	Employment-led (CR 1-to-1)
Warehouse Land Need	2.9	2.2
<b>Total Land Need</b>	<b>10.3</b>	<b>9.1</b>

Source: BE Group, 2024

**Table 34 – Preston OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	3.4	4.6
Industrial Land Need	1.1	1.5
Warehouse Land Need	1.4	1.8
<b>Total Land Need</b>	<b>5.9</b>	<b>7.9</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	2.7	3.6
Industrial Land Need	1.1	1.5
Warehouse Land Need	1.4	1.8
<b>Total Land Need</b>	<b>5.2</b>	<b>6.9</b>

Source: BE Group, 2024

**Table 35 – South Ribble OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	4.5	4.0
Industrial Land Need	4.7	4.1
Warehouse Land Need	3.9	3.4
<b>Total Land Need</b>	<b>13.1</b>	<b>11.5</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	3.4	3.0
Industrial Land Need	4.7	4.1
Warehouse Land Need	3.9	3.4
<b>Total Land Need</b>	<b>12.0</b>	<b>10.5</b>

Source: BE Group, 2024

3.68 It is important to note that this represents the employment land requirement specifically from these population and jobs growth scenarios and is not a

**forecast of OAN for the whole Central Lancashire economy, like Models 1 and 2. However, it does illustrate the maximum economic impacts of the projected jobs growth rates to 2041.**

3.69 It is not advisable to combine the outputs from the Model 3: Labour Supply Forecast with the Model 2: Labour Demand Forecasting to gain a 'whole economy' forecast model as this would combine two differing, incompatible models. Model 2 measures the 'demand' for jobs in Central Lancashire and Model 3 the maximum 'supply' of new workers which ideally need to be accommodated in the Central Lancashire economies. Additionally, the Cambridge forecasting, upon which Model 2 is based, already makes an allowance for population growth so comparing the two gives some duplication of requirements.

### **Summary**

3.70 Two forecast options have been produced and considered for the 2023-2041 for Chorley, Preston and South Ribble. These models include a Past Take Up model and a Cambridge Labour Demand model. The need calculated in each model allows for:

- An additional allocation of need to achieve a vacancy rate of 7.5 percent in local industrial, but not office, premises and deliver greater choice for businesses in their premises
- A 5-year buffer to allow for choice and potential change in needs during the Plan Period as well as accounting for exceptional further losses in the supply.
- Consideration as to what degree past losses of E(g)/B-Class land and premises, to other uses need to be accounted for in the OAN calculations.

3.71 In terms of the preferred OAN resulting for each Central Lancashire local authority area, the following can be noted.

3.72 **Office OAN:** Experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate, something broadly demonstrated by the comparisons between past jobs growth and past take up, discussed above. The jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward. In this regard,

it allows linkages to be made between employment land and housing needs as the latter will also be informed, at least in part, by forecasts of jobs change.

- 3.73 In terms of Preston, it is accepted that using the Labour Demand model for office OAN does not fully account for the loss of office premises in central Preston. However, that is arguably true of the Take Up Modelling, which is based on completions from the EP1 Employment Areas only. Labour Demand modelling at least uses data for the whole local authority area rather than being limited to the main Employment Areas. Additionally, the 5 year buffer is relied upon here to provide a degree of flexibility to account for losses of office space in the City while also providing space to accommodate the forecast future growth in the workforce, which is projected to be mostly in sectors requiring E(g)(i) accommodation. A larger office OAN may also prove hard to deliver given ongoing constraints in viably developing new office stock, as noted in Section 2.0.
- 3.74 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. This, together with the current viability issues associated with office development, suggests office take up will take place at a structurally lower rate than the past take up model would suggest. While it is not possible to say exactly how working practices will evolve to 2041, Labour Demand models net of homeworking are more realistic at this time. Thus, the recommended office sector OAN is set out in Table 36, including the assumptions applied.

**Table 36 – Recommended OAN for Offices**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	6.48	Labour Demand, net of homeworking Inclusive of Buffer equating to an extra 5 years
Preston	6.00	
South Ribble	5.76	
<b>Total</b>	<b>18.24</b>	

Source: BE Group, 2024

- 3.75 **Industrial and Warehouse OAN:** It should first be noted that industrial and warehouse needs can be linked together as, at the local scale at least, demand for industrial/warehouse space is frequently interchangeable, particularly on industrial

estates where outline consents are usually for general B Class Units, with the ultimate use determined by the occupier.

- 3.76 As referenced above, requirements for industrial and warehouse premises are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices, again as illustrated by analyses above. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.
- 3.77 Here therefore the Past Take Up model is recommended as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2010/2011, allowing that such economic growth and decline will continue to 2041. It is thus likely to be better in tune with real market demand than the Labour Demand model. As office sector need has already been accounted for, the industrial and warehouse sector OAN excludes office provision, to avoid double provision. Thus, the recommended industrial/warehouse OAN is set out in Table 37, including the assumptions applied.

**Table 37 – Recommended OAN for Industrial/Warehouse**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	34.97	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 19.61 ha A further Buffer of 5 years is applied on the Baseline figure An additional 9.35 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
Preston	68.43	Baseline in the Take Up modelling, Gross of Losses (to provide allowance for the scale of industrial/warehouse losses recorded), for Industrial/Warehouse Uses only = 44.80 ha A further Buffer of 5 years is applied on the Baseline figure An additional 11.79 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
South Ribble	51.23	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 27.29 ha

		A further Buffer of 5 years is applied on the Baseline figure An additional 16.67 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
<b>Total</b>	<b>154.63</b>	

Source: BE Group, 2024

**3.78 The combined OAN, linking office and industrial/warehouse needs, is therefore:**

- **Chorley – 41.45 ha**
- **Preston – 74.43 ha**
- **South Ribble – 56.99 ha**
- **Central Lancashire combined – 172.87 ha.**

3.79 The OAN of 172.87 ha from this study can be compared to the supply picture from the 2022 ELS, when Central Lancashire’s stock of available employment was identified to be 190.78 ha, comprising:

- Chorley: 56.28 ha
- Preston: 82.52 ha – Comprising 71.31 ha in EP1 allocations and another 11.21 ha in ELR sites which were excluded from the 2017 Study, which could provide further growth options (0.66 ha of these ELR sites fall in the City Centre Boundary, as defined in the Local Plan, all fall outside of EP2 Employment Areas)
- South Ribble: 51.98 ha.

3.80 By this measure Chorley would have had sufficient land to meet its needs while South Ribble would have had a modest shortfall of some 5 ha (although this supply figure assumed that none of the Cuerden Strategic Site (Lancashire Central) was counted as local supply for South Ribble, clearly adding it in would more than meet needs). Preston would also have had some shortfall if only its EP1 allocations were counted. However, it is acknowledged that these supply figures are now over two years old and some of this stock of land has since been taken up. As will be discussed in Section 4.0, however, the SHELAA/Call for Sites exercises have put forward provide ample potential further employment land to meet the identified OANs.

3.81 A further model, Model 3: Labour Supply has been produced which indicates the additional employment land need from an ‘Employment-led’ population growth scenario produced to inform the CLLP development process (see Tabe 38).

**Table 38 – Employment-led’ Population Growth Scenarios – Employment Change 2023-2041**

Area	Scenario	Total Employed, 2023	Total Employed, 2041	Change 2023-2041
Chorley	Employment-led	58,245	65,307	7,061
	Employment-led (CR 1-to-1)	58,245	63,729	5,483
Preston	Employment-led	70,269	74,181	3,912
	Employment-led (CR 1-to-1)	70,269	75,577	5,308
South Ribble	Employment-led	55,906	61,937	6,031
	Employment-led (CR 1-to-1)	55,906	61,213	5,307
<b>Central Lancashire Totals</b>	<b>Employment-led</b>	<b>184,421</b>	<b>201,425</b>	<b>17,004</b>
	<b>Employment-led (CR 1-to-1)</b>	<b>184,421</b>	<b>200,519</b>	<b>16,098</b>

Source: CBC, PCC, SRBC, 2024

3.82 Method 3 converts the projected employment change, into a land requirement (see Table 39-41).

**Table 39 – Chorley OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	6.0	4.6
Industrial Land Need	2.9	2.3
Warehouse Land Need	2.9	2.2
<b>Total Land Need</b>	<b>11.8</b>	<b>9.1</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	4.5	4.6
Industrial Land Need	2.9	2.3
Warehouse Land Need	2.9	2.2
<b>Total Land Need</b>	<b>10.3</b>	<b>9.1</b>

Source: BE Group, 2024

**Table 40 – Preston OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		

Use	Employment-led	Employment-led (CR 1-to-1)
Office (inc. Research and Development) Land Need	3.4	4.6
Industrial Land Need	1.1	1.5
Warehouse Land Need	1.4	1.8
<b>Total Land Need</b>	<b>5.9</b>	<b>7.9</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	2.7	3.6
Industrial Land Need	1.1	1.5
Warehouse Land Need	1.4	1.8
<b>Total Land Need</b>	<b>5.2</b>	<b>6.9</b>

Source: BE Group, 2024

**Table 41 – South Ribble OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	4.5	4.0
Industrial Land Need	4.7	4.1
Warehouse Land Need	3.9	3.4
<b>Total Land Need</b>	<b>13.1</b>	<b>11.5</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	3.4	3.0
Industrial Land Need	4.7	4.1
Warehouse Land Need	3.9	3.4
<b>Total Land Need</b>	<b>12.0</b>	<b>10.5</b>

Source: BE Group, 2024

- 3.83 However, this represents the employment land requirement specifically from these extra jobs and is not a forecast of OAN for the whole Central Lancashire economy. It is not possible to compare Models 2 and 3 to gain a whole economy forecast given the differences in the approaches. Also, the fact that Model 2, through the forecasting, already makes an allowance for projected population change would lead to some duplication of needs.
- 3.84 However, it should be noted that the Preferred OANs identified in Tables 36 and 37 above, would be sufficient to meet the employment land needs of projected population

growth, as identified in Model 3, while providing a surplus of land to accommodate business expansion from other areas of the economy, not tied to population change.

## 4.0 EMPLOYMENT LAND SUPPLY UPDATE – POTENTIAL FUTURE SUPPLY

### Introduction

- 4.1 This section provides a review of the potential land supply of Chorley, Preston and South Ribble which has been identified for employment and mixed uses in Call for Sites/SHELAA and, as of summer 2023, could be taken forward in the CLLP to meet the identified OAN of each Local Authority. The section considers the deliverability and market attractiveness of each site, any site constraints and how these might be overcome and how each site might meet identified market needs given changing economic circumstances. It seeks to confirm the scale and nature of the deliverable employment land supply which could be taken forward into the next CLLP, as required.

### Land Supply

- 4.2 Each Council has provided updated details on its possible future land supply as of August 2023:

#### *Chorley*

- 4.3 Chorley has 11 possible sites totalling 62.51 ha, of which 34.09 ha is specifically proposed for employment uses. This includes seven sites which were, in part or in full, previously allocated for employment uses under Policy EP1 – ‘Employment Site Allocations’ of the Adopted Chorley Local Plan 2012 – 2026: Site Allocations and Development Management Policies Development Plan Document (2015).

#### *Preston*

- 4.4 Preston has 11 possible sites specifically for employment uses, totalling 92.12 ha of which includes 18.10 ha across seven sites which are in existing employment use, including four sites which were previously allocated, in their entirety under Policy EP1 – ‘Employment Site Allocations’ of the Adopted Preston Local Plan 2012-26: Site Allocations and Development Management Policies Document (2015).

- 4.5 One local mixed-use site of 63.3 ha was also put forward, which could also accommodate employment use Class types B2, B8 and E(g).

#### *South Ribble*

- 4.6 South Ribble has three possible local sites specifically for employment uses, totalling 23.14 ha alongside the strategic Samlesbury Enterprise Zone with a gross size of

142.96 ha. Also, the mix use Moss Side Test Track (44.8 ha gross) and the Cuerden Strategic Site, another 66 ha. Two of the six identified sites were previously allocated for employment uses under Policy E1 – ‘Allocation of Employment Land’ in the Adopted Local Plan (2015), the Salmesbury and Cuerden Strategic Sites were also identified in the Adopted Local Plan for employment uses.

### **Land Supply Analysis**

- 4.7 Tables 42-44 provide an analysis of all the sites put forward, considering any plans for development already underway, site conditions, the market fit of the site and its deliverability. In terms of market fit, the view taken, reflecting the findings of Section 2.0 is that there remains good demand for industrial and warehouse units of up to 2,000 sqm across the sub-region. While wider economic conditions may provide some constraints in development, at least in the short term, there is little evidence of that on the ground at present, with schemes being successfully progressed in the Euxton Lane/Botany Bay area of Chorley, at the Moss Side Test Track/Farinton in South Ribble and in North East Preston and Riversway/the Docks in Preston. These locations are identified by stakeholders as particular foci for market interest. There also remain requirements for sites to support larger B2/B8 options even if demand is past the 2020-2022 peak, with interest extending to sites off the core Motorway Corridors.
- 4.8 Conversely, demand does not support large scale office developments, and none are assumed on the sites to be analysed.

#### *Chorley*

- 4.9 In terms of Chorley’s sites, there appear to be no barriers to delivery on the sites proposed for the Buckshaw Village, Botany Bay, Great Knowley area. As noted, this sub-area is identified by stakeholders as a focus for market demand in Central Lancashire. Plans for delivery are being progressed in the Botany Bay/Great Knowley area. Development is underway on Site CH/EP1.6 (19C244x and 19C162): Botany Bay, Chorley.

Table 42 – Employment Sites Schedule – Chorley

Site Ref (SHELAA Ref(s.))	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
CH/EP1.1 (19C265x) EP1.13 in the 2015 Plan	Southern Commercial, Buckshaw Village	2.04	<p>Proposed for Buckshaw Parkway a scheme of five large, three-storey office buildings of 1,970-3,154 sqm each. Building Two (2,153 sqm) was developed to a shell state in 2020 (App. No. 09/00659/REMMAJ).</p> <p>Discussions with the developer indicate that Building Two is now fully let, subject to final legal agreements, to multiple businesses. All are local firms. A rent of £17.50 sqft (£188/sqm) was achieved.</p> <p>There are no immediate plans to build out the next phases of the scheme, the developers waiting to see how the wider market changes.</p>	None	<p>While the completed building has now been let, this process has been let, with a reasonable rental level ultimately achieved, letting the building has taken over 3 years. This suggests a modest local office market, at least for offices of the scale proposed/delivered here. It is also noted that Building Two was ultimately let to local firms and did not attract inward investment. This last point is perhaps unsurprising given the connectivity Buckshaw Village has to the much larger office markets of Preston and Manchester.</p> <p>More generally, the experience of the Southern Commercial office development to date reflects an ongoing uncertain</p>	<p>The development of Building Two indicates that the consented offices can be physically developed here. However, difficulties in letting the completed building suggest that the delivery of further offices here remains a longer term prospect.</p> <p>Despite this, an unconstrained site of some 2 ha, in two parcels, remains, adjacent to Buckshaw Village Rail Station and the established industrial areas of Buckshaw Village. Given the small-medium sized industrial units which are being successfully delivered in several schemes across Chorley Borough, an equivalent industrial/warehouse scheme would also be achievable here.</p>	2.04	Yes

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
					<p>office market post the Covid-19 Pandemic. It is not possible to say, at this time when the office market might improve to the point that the other office buildings consented here are needed.</p> <p>The land remains available, however, and could also support industrial uses, reflecting the ongoing demand for industrial properties of up to 2,000 sqm, critical mass of developed industrial units in this area and the success of recent industrial developments in this area, such as Strawberry Meadows.</p>			
CH/EP1.2 (19C267x) EP1.11 in the 2015 Plan	The Revolution, Buckshaw Village	2.88	Site falls into the curtilage of the adjacent unit leased to Kimberley Clark and is under common ownership. At the time of writing a retrospective planning application was under	None	Sizable, unconstrained development plot in Buckshaw Village which has been consistently identified by stakeholders as a focus for market interest for industrial	Unconstrained development land, strongly located within the main employment area of Buckshaw Village. Land appears to have previously been held for the expansion of the adjoining use but is now subject to a	2.88	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
			consideration for B8 use.		and warehouse uses of all sizes in Central Lancashire. Given the loss of other opportunity sites in Buckshaw Village to non B-Class uses, this plot is of increasing importance.	retrospective planning application for B8 use. It should be noted that while some employment land in Buckshaw Village has been lost to residential uses, this generally comprised sites which fall within the housing areas of Buckshaw Village. Site CH/EP1.2 is bounded by large scale industrial and warehouse uses and would be ill suited for housing development.		
CH/HS1.10, CH/EP1.3 (19C100 and 19C119)	Land at Bagganley Lane, Chorley	13.32 total (2.65 employment)	No detailed delivery plans at this time	<ul style="list-style-type: none"> <li>• Trees on site</li> <li>• Public footpath crosses west of site (Bagganley Lane)</li> <li>• Black Brook runs to the south of the site although the plot mostly falls outside areas of identified flood risk</li> <li>• Within an ecological network/wildlife corridor</li> </ul>	The site's main constraint is that it does not relate well to existing employment areas although the successful development of the Botany Bay/Great Knowley area would build up the critical mass of premises east of the M61 more generally, potentially increasing developer interest in this location as well, particularly as other options around Junction 8, M61 are developed out. As	Site is likely to become more of interest to commercial developers once sites closer to Junction 8, M61 are developed out. Assuming an interested developer can be found for the commercial part of the scheme, the main barrier to delivery is likely to be access. It is assumed the commercial element would fall in the west of the site, as close to Blackburn Brow as possible to minimise the traffic impacts on the more residential streets of Knowley Brow/Heapey Road.	2.65	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
				<ul style="list-style-type: none"> <li>• Access would need to be agreed as existing roads, including Knowley Brow/Heapey Road and Bagganley Lane</li> <li>• Heapey Road frontage includes some land used as residential gardens.</li> </ul>	noted, stakeholders report continuing demand for industrial units of up to 2,000 sqm and with development progressing well on a range of sites despite increasingly challenging conditions.			
CH/HS1.13, CH/EP1.4 (19C239x, 19C093 and 19C165) EP1.6 in the 2015 Plan	Cowling Farm, Chorley	9.50 total (0.30 employment)	The residential element of site has been transferred to Homes England. A private developer will deliver the housing; while Chorley Council will make provision for a gypsy site (0.4ha) and employment uses. No detailed delivery plans at present.	<ul style="list-style-type: none"> <li>• The site is large, fairly regular in shape but undulating and would require some re-contouring.</li> <li>• Housing adjacent</li> <li>• Within an ecological network/ woodland network</li> <li>• Footpaths No 4 and No 5 cross the site and there is a related footbridge</li> </ul>	Stakeholders report continuing demand for industrial units of up to 2,000 sqm. While delivery is becoming more challenging in the current market conditions development is progressing on a wide range of sites, benefiting from ongoing growth in rents and continuing supply shortages. The land is distant from the core market areas around Buckshaw Village and Junction	Largely unconstrained land, with access available via Moorland Gate. The main barrier to delivery is likely to be the site's relative isolation compared to other opportunity plots and the modest size of the employment plot proposed. Absent a requirement from a business for the land or an immediate developer interest, delivery will likely require leadership and co-ordination by landowner Chorley Council.	0.30	<b>Yes</b> (Will require public sector support and co-ordination to realise)

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
				across the M61.	8, M61 and also sits outside of the main Chorley settlement area. However, it does adjoin several established Employment Areas and offers an opportunity for local scale growth in the east of Chorley.			
CH/HS1.15. CH/EP1.5 (19C242x and 19C160) EP1.9 in the 2015 Plan	Woodlands Centre, Southport Road, Chorley	5.16 total (1.55 for employment)	The Woodlands Centre, formally an adult education facility, owned by Lancashire County Council, closed for this use in 2016. Chorley Council now own the site.	<ul style="list-style-type: none"> <li>• Within the site there is a Tree Preservation Order (TPO6 (23 April 1992)) which comprises 13 individual trees, further woodland extends beyond the site.</li> <li>• Existing buildings to be cleared</li> <li>• Land adjacent and to the east and south of the allocation is included within a Biological Heritage Site (Walletts</li> </ul>	Previously viewed as an office site. However, demand for new offices remains modest post the Covid-19 Pandemic, limited by ongoing hybrid working practices and occupiers looking to consolidate rather than expand their space. In the present market, extensive office development remains unlikely outside of Preston City Centre and Chorley Town Centre, even given the site's proximity to Ackhurst Business Park.	The site is expected to become available for redevelopment in the short term. Demand here, as elsewhere, likely to favour industrial development here over offices. The barriers to development are thus likely to be integrating such uses with housing (which could cross fund the employment development) and integrating the protected trees into any scheme.	1.55	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
				<p>Wood, Copper Works Wood and Big Wood) which forms woodland and scrubland (Policy BNE9)</p> <ul style="list-style-type: none"> <li>• Within an ecological network/ woodland network</li> <li>• Site at risk from reservoir and sewer flooding.</li> </ul>	<p>A light industrial/industrial scheme is likely to be better supported by the market, reflecting the range of industrial schemes successfully delivered around Chorley, ongoing demand for sub-2,000 sqm units and the site's proximity to the established employment areas of Ackhurst Road.</p>			
CH/EP1.6 (19C244x and 19C162) EP1.2 in the 2015 Plan	Botany Bay, Chorley	8.82	<p>An E(g), B2, B8 industrial park of 36,996 sqm on 8.20 ha (App. No. 21/00439/FULMAJ) was approved with Section 106 agreement in Jan 2023. 0.40 ha of land comprising Blocks A and B is consented for retail and hot food uses, giving a realistic employment land provision here of 7.80 ha. At the time of writing this scheme was under development as Botany Bay Business Park</p> <p>There is also an aspiration to reuse at least part of the Botany</p>	<p>Assumed none as site under development.</p>	<p>Site under development primarily for 33 industrial and warehouse units of 121-15,282 sqm, with all but four being sub 1,000 sqm in size. Botany Bay Business Park is likely to be a valuable source of small-medium sized B2/B8 property in the short term, meeting identified needs. Demand for the larger units may prove more modest, particularly as</p>	<p>Development underway</p>	<p>8.20 (Based on existing consents for employment uses plus the Mill)</p>	<p><b>Yes</b> (Development is underway)</p>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
			Bay Mill (0.40 ha) for a mixture of office and storage uses. This would be subject to multiple planning consents for the re-use and refurbishment of this historic listed building. In June 2023 the Mill received full consent for 7,971 sqm of leisure and car parking uses across 4 floors of the mill. Uses to include a helipad and 1,041 sqm for a multi-use space for exercise classes, team bonding sessions, and sports (App. No. 22/01080/FULMAJ).		stakeholders suggest that quite high rents are being sought for these. However, they only represent a small portion of the stock.			
CH/EP1.7 (19C245x and 19C163) EP1.3 in the 2015 Plan	Land East of M61	6.92	The land was previously the subject of Outline planning consent for 27,871 sqm of B2 and B8 accommodation, car parking, landscape, drainage and other infrastructure (App. No. 17/00713/OUT). This consent has now lapsed, however.	<ul style="list-style-type: none"> <li>The site is within an area forming part of the source of the River Chor.</li> <li>Part of the site is within an ecological network – grassland identified by Lancashire County Council.</li> </ul>	As noted, demand remains for at least the smaller units proposed, with stakeholders indicating that a strong body of businesses remain with capacity to invest in new property locally. This will build upon Botany Bay Business Park which is now being developed on	Deliverability is evidenced by development on site CH/EP1.6, which is under common ownership with this site and controlled by an established developer. The market continues to support at least the smaller units here and CH/EP1.7 could form a later phase of Botany Bay Business Park.	6.92	<b>Yes</b> (Assuming a successful development on CH/EP1.6 a medium term development likely here)

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
				<ul style="list-style-type: none"> <li>The site is crossed north to south by Footpath No 26</li> <li>Very little drainage infrastructure and no water infrastructure available in this area.</li> </ul>	adjacent CH/EP1.6 and deliver a critical mass of business property in the M61 Corridor which this site can build upon.			
CH/HS1.20, CH/EP1.8 (19C250x and 19C188)	Bengal Street Depot, Chorley	0.70 total (0.35 for employment)	Chorley Council owned depot. It is assumed the depot is surplus to requirements by the Council. No immediate development plans noted.	<ul style="list-style-type: none"> <li>Buildings on site</li> <li>Possible contamination from the previous use</li> <li>Housing adjacent</li> <li>Access is onto a dual carriageway close to a roundabout</li> <li>Site at risk from reservoir flooding.</li> </ul>	The strong demand for light industrial units in Chorley Borough is evidenced by the success of Strawberry Meadows and the delivery of some 12 units of some 131 sqm each (ground floor and mezzanine) at Vyking Enterprise Hub, on nearby Standish Street. The latter is one of a number of light industrial schemes successfully delivered in small plots in the Chorley urban area.	Assuming an uncontaminated plot with appropriate access onto the A6 can be secured a small industrial scheme would be deliverable here, reflecting other successful developments on similar plots, such as the Vyking Enterprise Hub.	0.35	Yes

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
CH/EP1.9 (19C050)	Land at Euxton Park Golf Centre, Euxton Lane, Chorley	0.69	<p>Site owned by GA Pet Foods.</p> <p>In discussions over 2022/2023 GA identified a requirement for 30,000 sqm of warehouse space and 10,000 sqm of office space in the area of Buckshaw Village. In the absence of any large remaining employment sites on Revolution Park, the proposal is to redevelop the full 8 ha Euxton Park Golf Range, to address this requirement. GA are proposing to use an existing bridge across the railway to link its existing facility with the new site, subject to agreement with Network Rail. GA is considering site levelling and water storage on the Golf Range and is in discussions with the leaseholder.</p>	<ul style="list-style-type: none"> <li>• Trees onsite</li> <li>• Site subject to an existing lease</li> <li>• Buildings onsite</li> <li>• Narrow linier plot</li> <li>• Site has access to Euxton Lane. Access north to Buckshaw Village would require use of the existing bridge across the railway. Refurbishing this bridge would be a sizable extra cost to any project and could impact on viability</li> </ul>	<p>Site falls into the core Buckshaw Village market area which has been consistently identified by stakeholders as a focus for market interest for industrial and warehouse uses of all sizes in Central Lancashire. The location also benefits from proximity to the successful Strawberry Meadows scheme to the east, which has delivered multiple light and general industrial schemes in recent years, demonstrating the ongoing ability to deliver industrial accommodation in this area, and building up the critical mass of premises along Euxton Lane.</p> <p>As noted, there is identified interest from the site owner, to develop the wider site for its own uses.</p>	<p>There is an established interest in the land from the landowner for development for its own purposes. However, the interest would be for the whole Golf Centre site, including previously undeveloped Green Belt land, to support a large warehouse and office scheme. Only the previously developed part of the site is being considered, which is a narrow, linier plot which would be too small to accommodate this use and likely of negligible interest to local developers who would be seeking a larger and more regularly shaped development site, comparable to the plots at Strawberry Meadows. The full 8 ha site would thus be much more deliverable than this plot, by itself.</p> <p>If the site was developed by GA, it would potentially include an upgraded access over the railway to GAs existing site. If it was developed by other parties such an expensive northern access is unlikely to be viable and all access would be from Euxton Lane.</p>	0.69 (But full 8.06 ha site likely to be needed to give a deliverable site here, see below)	<p><b>Maybe</b> (Dependant on what land is ultimately allocated here)</p>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
CH/HS1.37, CH/EP1.11 (19C411)	Land south west of The Green and Langton Brow, Eccleston	2.38 total (1.19 employment)	Site appears in full use at the time of writing accommodating the Bygone Times retail scheme plus a number of secondary tenants. No identified re-use plans at this time. However, the site is primarily owned by individuals associated with FI Real Estate who are successfully managing development at Botany Bay and Great Knowley.	<ul style="list-style-type: none"> <li>• Site developed and in full use at this time</li> <li>• Site includes the historic Grove Mill which it is assumed will need to be protected</li> <li>• Syd Brook to the south west. Most of the site falls into Flood Zones 2 and 3</li> <li>• Site slopes to the south west</li> </ul>	Eccleston is not identified as a strong area of further demand for industrial, warehouse or office uses by stakeholders. However, the site is already an established industrial/warehouse employment area, albeit one focused on trade and retail/wholesale uses, which appears well occupied at present. Further intensification and/or redevelopment would be able to build on this established location. The site would also be well placed to serve the rural west of Chorley Borough, within which no other growth options are put forward at this time.	Site does have some constraints, including how Grove Mill would be treated in any scheme and potential issues of flood risk. However, the site is under developer control and any employment uses put forward here would be building on an established employment location, albeit one which may be subject to a complete redevelopment/replacement of existing uses. It is assumed this would be a longer term option for development, to be completed after sites at Botany Bay/Great Knowley have been brought forward.	1.19	<b>Maybe</b> (Assuming site constraints can be addressed)
CH/HS1.17 (19C415 and 19C161)	Botany Bay/Great Knowley,	12.14 total (6.70 employment)	At the time of writing consent was being sought for 29,971 sqm of E(g), B2, B8 space	<ul style="list-style-type: none"> <li>• Topography of the site, the Leeds and Liverpool</li> </ul>	Proposals are for mostly smaller industrial/warehouse units which remain	Even if the current planning application is not consented, interest has been demonstrated by an	6.30 (based on current	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
EP1.1 in the 2015 Plan	Blackburn Road		<p>on 6.30 ha (App. No.22/01243/FULMAJ). Proposals are for 75 industrial/warehouse units of 93-2,713 sqm each, with all but two being sub-560 sqm each in sizes. Proposals are by FI Real Estate, owner/developer of EP1.2.</p> <p>At the time of writing the main housing consent on the site was for 100 dwellings on 4.9 ha (App. No. 17/00716/OUTMAJ), with other residential consents expected to be superseded by employment proposals</p>	<p>Canal and the slope up to Knowley Brow.</p> <ul style="list-style-type: none"> <li>• A Tree Preservation Order (No 8 (Chorley) 2006 and Definitive Footpath No 26 cross the site.</li> <li>• The sites are identified as being within multiple National Character Areas</li> <li>• Impacts to multiple ecological habitats</li> <li>• Potential need to provide a bridge across the Canal is a barrier to financial viability</li> <li>• Possible junction investment around J8, M61 required</li> </ul>	<p>in good demand across Central Lancashire, from businesses which continue to have the capital to invest in modern premises. Development here would likely progress as a later phase of the wider Great Knowley/Botany Bay development, after Botany Bay Business Park has been completed, minimising the risk of oversupplying the market.</p>	<p>established developer who is actively delivering commercial premises on an adjacent site. There are constraints to overcome, and particularly agreement needs to be reached on a viable site access. However, developers appear to accept that this half of the wider Great Knowley site is deliverable for commercial uses. Development of the adjacent Botany Bay Business Park will also provide a sizable critical mass of local businesses, with CH/HS1.17 becoming a logical later phase development site for this Employment Area.</p>	<p>consent being sought)</p>	

*Source: CBC and BE Group, 2023*

- 4.10 On Site CH/EP1.1 (19C265x): Southern Commercial, Buckshaw Village, the developed office, which has stood vacant for some years, is understood to now be let. The development of other offices here is unlikely in the short-medium term, but this well located site is under developer ownership and remains available to support other E(g)/B-Class uses.
- 4.11 Other sites, such as CH/HS1.20, CH/EP1.8 (19C250x and 19C188): Bengal Street Depot, Chorley are well located in the Borough, and are under Borough Council, County Council or Homes England ownership, allowing public sector leadership to drive development.
- 4.12 There are delivery questions around sites:
- Site CH/EP1.9 (19C050); Land at Euxton Park Golf Centre, Euxton Lane, Chorley – The most likely use for this site would be development to meet the needs of the landowner GA Pet Foods. However, GA will likely seek to redevelop the full 8 ha Euxton Park Golf Range. By itself this narrow, 0.69 ha site is likely to be of only modest interest to developers and GA
  - CH/HS1.37, CH/EP1.11 (19C411): Land south west of The Green and Langton Brow, Eccleston – The site is presently in full use and has constraints including areas in Flood Risk and a historic Mill covering a large part of the site. It is unclear what the net developable area here would be. It is assumed the site is put forward as a longer term development prospect, but it does benefit from being an established employment area, serving the rural west of the Borough, and from being owned by a developer with a track record of managing comparable re-use/redevelopment schemes elsewhere.

*Preston*

- 4.13 In terms of the sites put forward just for employment uses, there would be few barriers to the delivery of the site put forward around Junction 31a, M6. North East Preston is consistently identified by stakeholders as a focus for industrial and market interest in the city, most recently evidenced by the ongoing delivery of the Preston East scheme at Trefoil Way.

Table 43– Employment Sites Schedule – Preston

Site Ref (SHELAA Ref(s.))	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
<b>Preferred Employment Sites</b>								
(19P133) Previously Local Plan site EP1.2	Red Scar Site H / Red Scar, Whittingham Lane, Broughton	2.75	Across Red Scar Industrial Estate, land is now on the market as some 16 design and build plots of 0.4-1.6 ha, capable of producing premises of 2,787 to 11,613 sqm for leasehold, long leasehold (125 years) or freehold basis	<ul style="list-style-type: none"> <li>• Woodland- small section to the northern boundary</li> <li>• Large drainage pond on site</li> <li>• Some Flood Risk</li> <li>• An overhead power cable currently runs across the site towards the southern boundary.</li> <li>• In addition, a foul sewer and culverted watercourse are known to run across the site.</li> <li>• The site is located on the southern edge of the Red Scar Industrial Estate within a Biological Heritage Site.</li> </ul>	Land falls within an established employment area within North East Preston, regularly identified by stakeholders as the focus for industrial and warehouse market interest in Preston. Stakeholders report ongoing good demand for industrial premises up to 2,000 sqm and a group of businesses with the finance for new accommodation. The backland nature of the site will make it less attractive than other more prominent sites in North East Preston, but this land remains available to meet identified needs, with main access roads in place.	Constraints will limit the net developable area, but across Red Scar there remains a sizable area of flat, unconstrained land which is available for development reflecting the successful development of other sites in North East Preston, including the Preston East Scheme.	-	<b>No</b> Land is in an existing Employment Area so already in employment use

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
(19P135) Previously Local Plan site EP1.4	Red Scar Industrial Estate / Red Scar, Whittingham Lane, Broughton	12.02	<p>16 B2 units consented within two buildings at Tustin House on a 1.15ha plot here (App. No. 06/2023/0778). There are a diverse range of historic consents on, or adjacent to the site, but the main unimplemented ones are:</p> <ul style="list-style-type: none"> <li>Phase 3 of Ribble Court. 1395 sqm of E(g)/B2/B8 uses(App. No. 06/2018/0751). Plot appears to be in full use for open storage at time of writing</li> <li>Longridge Road Energy Centre - 9.27ha of land, now excluded from the revised site area is consented for a, 16,335 sqm, Longridge Road Energy Centre (App. No. 06/2019/0743; LCC App Ref: LCC/2019/0029,). The Applicant is MT Green Power Limited, Miller Turner to construct. Various planning conditions</li> </ul>	<ul style="list-style-type: none"> <li>Woodland- small section to the northern boundary</li> <li>The remaining land is narrow and linear in places</li> <li>Some Flood Risk</li> <li>An overhead power cable currently runs across the site towards the southern boundary.</li> <li>In addition, a foul sewer and culverted watercourse are known to run across the site.</li> <li>The southern edge of the site is within a Biological Heritage Site</li> </ul>	<p>The remaining land will surround the energy from waste facility. This facility will make the location less attractive to some occupiers but experience elsewhere suggests there remain plenty of industrial and warehouse occupiers who will located close to such a facility. A local example of this at Lancashire Business Park, Farington where the development of the Global Renewables Waste facility has not impacted demand for other premises, nor development on adjacent sites. Indeed, the Longridge Road Energy Centre may attract supply chain businesses, for this sector to Red Scar. As noted for 19P133 demand for general</p>	<p>A range of smaller uses have been successfully delivered in Red Scar, most recently Unit B23 Red Scar Industrial Estate. Funding and development partners are understood to be in place for the Longridge Road Energy Centre, the development of which will further open up this site.</p>	-	<p><b>No</b> Land is in an existing Employment Area so already in employment use</p>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
			were being progressed over 2021/22. Non-Material Amendment application (LCC/2019/0029NM1, granted 18/01/22) extends time for development commencement up to January 2025. The remaining land surrounds this consent site.		industrial uses is also strong.			
(19P136)	Millennium City Park, 4A Barnield Way, Broughton	0.78	The bulk of the site is in active use by MM Acquisitions for HGV Storage. 0.49 ha of the site is subject to an application for a scheme of eight terraced industrial units comprising 1,874 sqm of floorspace of 168-242 sqm each. Also consented in the wider area are: <ul style="list-style-type: none"> <li>Full consent (App. No. 06/2021/1467 a 738.8 sqm B2/B8 use unit with ancillary offices and trade counter, on 0.21ha. The site is currently occupied by HGV parking, the</li> </ul>	<ul style="list-style-type: none"> <li>Trees onsite</li> </ul>	There remains strong interest from businesses for industrial units of less than 2,000 sqm with North East Preston identified as an ongoing area of market interest. A diverse range of smaller industrial schemes have been successfully delivered across Preston and Chorley in recent years.	Unconstrained site where a consent for light industrial premises is being sought.	-	<b>No</b> Land is in an existing Employment Area so already in employment use

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
			<p>proposed unit is on the market.</p> <ul style="list-style-type: none"> <li>In eastern land parcel full approval (App. No. 06/2019/0849) and a technical start made on five B2 units totalling 1,224 sqm.</li> </ul>					
(19P141 Previously Local Plan site EP1.10)	Preston East Junction 31A M6	25.31	<p>App. No. 06/2021/0174 requested an EIA Scoping Opinion application for a proposed development of an employment park comprising up to 80,000 sqm of industrial and/or logistics building(s) (Class B2/B8) and ancillary buildings.</p> <p>A developer partner, Trebor Developments (in a Joint Venture with Hillwood developments), has now been secured. The site, known as Gateway Park, is now on the market for 3-4 B2/B8 units of 3,065 sqm to 74,322 sqm. It is intended that units will be available for occupation by 2025, although no planning</p>	<ul style="list-style-type: none"> <li>Existing ponds on site.</li> <li>Trees and hedgerows on site</li> <li>An overhead electric cable runs diagonally across the site.</li> <li>Lies entirely within a low-level flood risk zone. Substantial landscape buffers will be required as part of any development proposals.</li> </ul>	<p>Although stakeholders report a weakening market for larger units, demand still exists, particularly at the regional and national level. The almost immediate M6 access from Junction 31(a), although southbound only, would make the site attractive to large occupiers.</p>	<p>Experience at Farington Hall Estate, Farington, South Ribble shows that a large B2/B8 can be delivered in Central Lancashire in the present market. This site is now under the control of an experienced developer with capacity to deliver space in the short term, subject to planning.</p>	25.31	Yes

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
			application has been submitted at the time of writing.					
(19P142) Previously Local Plan site EP1.11	11 Roman Road Farm	24.94	The site now has Outline consent (App. No. 06/2022/0745) for 76,445 sqm of floorspace, of which 71,721sqm is for B2/B8 use and 4,724 sqm is for first floor offices. Reserved Matters consent (App. No. 06/2023/0844) is being sought at plots 6 and 8 within outline site for a 13,686 sqm warehouse unit, associated tower and operations building (B2/B8 use) on a 2.68ha site. This property is intended for Tilemaster (Kerokoll).	<ul style="list-style-type: none"> <li>• Course of an old roman road runs through the northern section of the site</li> <li>• Potential habitat for bats and birds within the site</li> <li>• Trees and hedgerows on site</li> </ul> The site borders onto the Red Scar and Tun Brook Woods Site of Special Scientific Interest (SSSI) and the Tun Brook.	Proposals are for mid-sized warehouse units. Although stakeholders report stronger demand for sub-2,000 sqm units, interest from renters, if less so from investors, remains for larger units. Supply shortages remain, against demand in most parts of Central Lancashire. The site is in the backlands, which will make it less attractive to some occupiers but it still benefits from a position within the established North East Preston Employment Areas. It also benefits from the fact that employment sites closer to Junction 31(a) M6 are now largely developed out.	The consented scheme is now on the market as APTUS for 11 units of 2,404 sqm to 13,686 sqm each, with consent now being sought to deliver the largest unit (Unit 8) for a defined occupier. Proposals thus being progressed by a team of experienced developers – Henry Boot Barnfield – with the resources and experience to deliver the proposed development in the short term.	24.94	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
(19P194)	Oak Street, City Centre, PR1 3XD	0.14	No identified plans	<ul style="list-style-type: none"> <li>Occupied older industrial buildings in the south</li> <li>One residential property at the Oak Street/Manchester Road junction</li> </ul>	Small infill site comprising an unsurfaced car park and some adjoining older buildings, close to the City Centre. Given the industrial character of the area the most likely be a light industrial scheme. As noted, demand for such premises is strong across Central Lancashire. Office uses are unlikely in such a comparatively peripheral, mostly industrial location and given the ongoing constraints in the office market post the Covid-19 Pandemic. The site could generate more value if it was brought into a wider regeneration scheme including vacant land to the east of Manchester Road.	Development of the vacant land would be comparatively straightforward. Including the adjoining properties, which appear occupied and under approx. two ownerships would be more difficult to deliver and may generate viability constraints. N.B. the land and largest industrial unit to the south are under common ownership however.	-	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P286)	St Marys and St Marks, St	1.75	Site comprises the former Museum of Lancashire buildings the HMRC buildings of	<ul style="list-style-type: none"> <li>Site in active use</li> <li>Historic buildings which need to be</li> </ul>	At the time of writing, it is unclear what, if any of this site will be released	At the time of writing, it is unclear what, if any of this site will be released	-	<b>No</b> Land is in an existing

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
	Mary Street, Preston		<p>St Marks/St Mary's House and a row of occupied shops on the A59 frontage.</p> <p>The Museum buildings are in use for storage at this time. LCC officers report interest from the Ministry of Justice for the use of these buildings for a range of uses.</p> <p>HMRC's existing transitional site in Preston, at St Mark's House and St Mary's House, was due to close in 2025, with employees moving to our Manchester or Liverpool regional centres. In April 2023 it was announced that more than 1,000 HMRC jobs will remain in Preston for the long term. HMRC has yet to determine whether St Mark's House and St Mary's House will be retained or if a new base will be established elsewhere in the city.</p> <p>A59 shops are in full use.</p>	retained (some Listed)	<p>from its present public sector uses. Assuming property was released the most likely outcome would be re-occupation of premises by other office occupiers. For offices, stakeholders report a constrained market, particularly for larger suites but ongoing demand for smaller units, especially in serviced schemes. There would likely be pressure to sub-divide any office space which can be available to support smaller business needs, assuming a larger office occupier could be found.</p>	<p>from its present public sector uses. Assuming St Marks/St Mary's House and/or the Museum Buildings were released by their present occupiers the most likely outcome would be sale/lease of the properties for re-occupation by other office businesses, potentially with some refurbishment. A more comprehensive redevelopment plan would be expensive and would likely require a mixed-use scheme to achieve viability i.e., redeveloping offices for more modern offices only is unlikely to be viable without cross funding from other uses. At the time of writing no one is identified as proposing such a scheme.</p>		Employment Area so already in employment use

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
(19P314)	22 to 24 Manchester Road, Preston	0.08	No identified plans. Site appears to be in active use as a superstore with parking above.	<ul style="list-style-type: none"> <li>Site in active use</li> </ul>	Small site which appears in active use as a footsore, it is not clear if the site is available. If it is available for redevelopment, given the industrial character of the area the most likely be a light industrial scheme. As noted, demand for such premises is strong across Central Lancashire. Office uses are unlikely in such a comparatively peripheral, mostly industrial location and given the ongoing constraints in the office market post the Covid-19 Pandemic. The site could generate more value if it was brought into a wider regeneration scheme including vacant land elsewhere on Manchester Road.	The viability of a redevelopment on such a small site would need to be tested against a proposed scheme, but assuming a viable scheme can be secured redevelopment could be progressed.	-	<p><b>No</b></p> <p>Land is in an existing Employment Area so already in employment use</p>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
(19P329)	Land and Buildings at St Marys Street, Preston	0.87	Site comprises the former Museum of Lancashire buildings and the Lancashire Conservation Studios in former Church buildings. All owned by LCC. The Museum buildings are in use for storage at this time. LCC officers report interest from the Ministry of Justice for the use of these buildings for a range of uses. The Lancashire Conservation Studios remain in use by LCC for historic preservation work.	<ul style="list-style-type: none"> <li>Historic buildings which need to be retained</li> </ul>	It appears the site will remain in public sector use.	Site does not appear to be available at this time	-	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P012 and 19P198)	Alstoms, Strand Road	6.35	Developed site accommodating a range of tenants including BAE, ROCCIA and Granite House	<ul style="list-style-type: none"> <li>Site includes historic industrial buildings which may need to be retained in any scheme</li> <li>Site subject to several ongoing property leases of 10-15 years, also several historic 999 year leases associated with electrical infrastructure</li> </ul>	Site already accommodates several high value B2/B8 tenants, and any future scheme should look to build on this existing critical mass. The site falls into the Riversway/Docks area, which has been consistently identified by stakeholders, across multiple studies, as	Site is already in active employment use and any scheme of property refurbishment would add value to a location which already accommodates several high quality tenants. Any scheme would need to consider any historic premises which would need to	6.35	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
				<ul style="list-style-type: none"> <li>Gas distribution pipes and buffer run down the southwestern boundary of the site. It is within the HSE Risk Zone for hazardous installations/ pipes</li> <li>Site has a record of sewer flooding.</li> </ul>	a focus for market interest for industrial, and when required, office uses, building on a strong critical mass of existing companies and a prominent position in the city.	be protected, the desirability of retaining existing high value tenants and allowing for the leases on the site. The site is owned by the City Council which would allow the Council to lead on and support any scheme.		
(19P178)	Riversway Phase B Site Specific Policy, Maritime Way	17.13	No identified plans	<ul style="list-style-type: none"> <li>Whole site is in Flood Zone 2</li> <li>Trees onsite</li> <li>Watercourses cross the site</li> <li>Pylons cross the west of the site</li> <li>Lancashire Woodland Ecological Network runs through northern part of the site.</li> <li>Ecology consultation zone runs within eastern edge and southern edge of site</li> <li>Gas distribution pipes and Transpennine Ethylene distribution pipes with buffer run</li> </ul>	Site forms a logical extension to the Preston Riversway/Preston Docks Employment Area with a common access at the Nelson Way/Chain Caul Way junction and the Riversway Motor Park adjacent. The Riversway/Docks area has been consistently identified by stakeholders, across multiple studies, as a focus for market interest for industrial, and when required, office uses, building on a strong critical mass of existing	The site is constrained but the development of adjacent land suggests such constraints can be overcome. The land is owned by the City Council, allowing the Council to lead on and push forward any scheme.	17.13	Yes

Site Ref (SHELAA Ref(s.))	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
				across the middle of the site from roughly west to northeast. Other transmission pipes with buffer are located within the western edge of the site.	companies and a prominent position in the city. It would suit the development of further industrial and potentially trade uses, building on ongoing needs and a lack of alternative options in west Preston area.			
<b>Mixed-Use Sites</b>								
(19P031)	Land West of Cottam and East of Preston Western Distributor.	126.65 gross (63.3 proposed for commercial)	No identified plans. Various housing schemes, consented and under construction, on adjacent sites	<ul style="list-style-type: none"> <li>• Railway and Lancaster Canal Cross the site. Small strip of biological heritage site follows the canal through the site</li> <li>• Active golf club (Ashton and Lea) in the south</li> <li>• Pylons cross the site</li> <li>• Watercourses and ponds on the site</li> <li>• Farms on site</li> <li>• Housing adjacent</li> <li>• Land in multiple ownership</li> </ul>	Given the scale and location of this site, it is assumed any scheme put forward would be housing led. Thus, the site should first be assessed against residential needs and requirement. It is also unclear if a full half of the site would realistically be brought forward for commercial uses in this mostly residential location, or be held for other options, such as open space. Assuming a large site for E(g)/B-Class Uses the most likely	Development here would represent a sizable western expansion of the Preston urban area. Any scheme is likely to be housing led and deliverability needs first to be considered in the context of residential uses firstly. If a large scale employment site was also put forward here it would likely accommodate a strategic B2/B8 use. Key for deliverability would be to agree the position of the employment site in relation to housing,	63.3	<b>Maybe</b> (Although the land sits in a relatively strong location, there are a range of practical issues which would need to be address before an employment allocation could be considered)

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
					<p>development would be for a strategic scale B2/B8 scheme. As noted, there remains reasonable market interest for such uses in Central Lancashire. The site enjoys a relatively prominent position on the new Western Distributor Road which an access point at the Avice Pimblett Way junction.</p> <p>A new railway station, Cottam Parkway, is now consented nearby which will increase the location's attractiveness for both residential and commercial uses generally, but unlikely, by itself to increase interest for uses such as offices given the of existing lack of critical mass of such uses in North West Preston and wider constraints on the market.</p>	<p>and its accessibility to Edith Rigby Way and the M55. A clear plan would also need to be agreed between the landowners and developers as to how, and under whose responsibility, it would be to progress the employment element of the project. This would need to include an apportionment agreement amongst the landowners to compensate landowners, whose plots will accommodate the (potentially) lower value employment uses against the higher value housing. Finally, it needs to be clarified that the Ashton and Lea Golf Course is realistically available to be included in an allocation here.</p>		

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet long term needs (Yes/No/Maybe)
					Developers and logistics businesses would also likely prefer a location closer to the M55 Junction and more distant from housing development.			

Source: PCC and BE Group, 2023

- 4.14 Overall, some 73.73 ha appears available for employment uses on sites which appear deliverable and capable of meeting market demand, and which have not previously been allocated for employment.
- 4.15 A substantial mixed-use site is put forward east of the new A582 Western Distributor Road – Site 19P031: Land West of Cottam and East of Preston Western Distributor. At 126.65 ha overall, this would represent a sizable extension of the Preston settlement area and one where development is likely to be housing led. The site thus first needs to be assessed on this basis. Assuming a large scale employment site can be provided here, comparable to the 50 percent (63.3 ha) put forward, it would again most likely support larger B2/B8 uses. Some 2 km south of the new M55 Junction, this would be a reasonable location for such uses, which will prioritise strategic road access. It would not necessarily be superior in this regard to locations in North East Preston which would have direct M6 access however (albeit only to the southern junction accesses of Junction 31a). A new railway station, Cottam Parkway, is now consented nearby which will increase the location's attractiveness for both residential and commercial uses generally, but is unlikely, by itself to increase interest for uses such as offices given the of existing lack of critical mass of such uses in North West Preston and wider constraints on the market.

**Table 44 – Employment Sites Schedule – South Ribble**

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
<b>Preferred Sites Strategic Sites</b>								
SR/EP1.2, SR/HS1.1 (19S052) Previous Local Plan Policy C4	Cuerden Strategic Site	66.00 (48.69 ha identified for commercial uses)	Now referred to as Lancashire Central an Outline planning consent was granted in December 2023 (App. No. LCC/2022/0044) for LCC and its development partner Maple Grove Developments (part of the Eric Wright Group). The consent is for up to 155,000 sqm of B2/B8 premises, with options for up to 19,000 sqm in offices, in four phased zones alongside retail and leisure facilities and 116 homes. Development is proposed on land under LCC ownership. A further 15.93 ha site to the south, owned by Brookhouse Group could provide 52,385 sqm of B2/B8 uses	<ul style="list-style-type: none"> <li>• Large scale road infrastructure investment required</li> <li>• Housing adjacent</li> <li>• Various environmental features on site including ponds and woodland</li> <li>• Site includes Stoney Lane landfill also adjacent to the site is quarrying of sand</li> </ul>	The site is expected to provide premises in a range of sizes, to meet a range of requirements. The focus is expected to be on B2/B8 development likely focused on larger floorplate properties. Maple Grove report active interest from both national/regional and local businesses in the B2/B8 premises. Some office accommodation is put forward here although it appears to be only one option within the design. As mentioned, the office market remains limited post the Covid-19 Pandemic so little E(g)(i) development can be expected in the short-medium term, but the option remains for longer	Several schemes have been proposed here and ultimately not progressed due to a range of factors. There is a stronger commitment to taking things forward now however, with plans backed by an established developer partner and land under public sector control. Proposals are now focused on B2/B8 premises which better reflects market demand rather than previous focuses on major office or retail schemes. Proposals are also not now dependant on an anchor tenant as was the case with the past Ikea led scheme. Viability testing, submitted for the application and completed by CBRE in July 2022	31.93 (Identified net plot size of the four main commercial development plots in the planning application (16 ha) plus 15.93 ha of further development land) Full application site is 51.3 ha	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
			based on historic planning consents. Maple Grove has indicated that it would be willing to commence the scheme within a year of securing consent, commencing the offsite highways works in 2024, followed by, or along with, early phases of employment uses, delivered on a speculative or design and build basis.		term growth in the Bamber Bridge area which has historically been popular with office occupiers due to its strong road connections and access to the Preston market.	(‘Financial Viability Statement, Page 7) also indicates that the scheme is viable. Development is expected to come forward in phases to avoid oversupplying the market at any one time.		
SR/EP1.7 (SRBC001) Previous Local Plan Policy C5	Samlesbury Enterprise Zone	142.96	The Enterprise Zone has been in operation since 2011. Although most Enterprise Zone benefits have now ended the site has seen a number of schemes completed: <ul style="list-style-type: none"> <li>• Access is in place from the A59 and other junction work has been completed</li> <li>• The Wincanton Defence</li> </ul>	Assumed none – Development land appropriately mitigated, with the main access road developed.	The Enterprise Zone is a strategic site, intended to attract investment from outside of South Ribble and Lancashire. Development to date has been for support and training facilities for BAE rather than independent businesses. The National Cyber Force Campus will now take up a high proportion of the	Deliverability is evidenced by the range of facilities developed to date and the infrastructure provided. Further growth will be supported by major national government investment.	35 (net developable area within South Ribble. From which completed properties will need to be deducted)	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
			<p>Logistics Centre, which is purpose built to support BAE Systems production and through life support programmes. It has a 13,000 sqm footprint and employs 170</p> <ul style="list-style-type: none"> <li>• BAE's 7,400 sqm Academy for Skills and Knowledge (ASK), an apprentice and training facility</li> <li>• BAE's 13,000 sqm Asset Management Facility</li> <li>• An Advanced Manufacturing Research Centre (AMRC) of 4,500 sqm. It is operated as a partnership between BAE and the University of Sheffield to support advanced</li> </ul>		remaining land and it is not clear what, if any, land will remain to meet further requirements.			

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
			<p>research and innovation activities in the North West.</p> <p>In October 2021, it was also announced that the Samlesbury Enterprise Zone will be home to a £5 billion campus for the National Cyber Force. The properties developed will accommodate cyber experts from MI6, GCHQ, the Ministry of Defence and the Defence Science and Technology Laboratory. The size of the buildings, to be developed by 2030, have yet to be agreed but the campus is likely to take up a sizable area of land within the Enterprise Zone</p>					
<b>Preferred Sites Local Sites</b>								
SR/EP1.3 (19S119)	Farington Moss, Land at Lodge Lane, Flensburg Way and	11.84	No identified plans	<ul style="list-style-type: none"> <li>• Trees on site</li> <li>• Falls into Existing Local Plan Policy Area AS3, an area of</li> </ul>	Site has a strong position on the A582, with good linkages to the critical mass of employment premises of	The Site comprises unconstrained greenfield land on a main road location. There are no strong barriers to delivery	11.84	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
	Penwortham Way, Farington			<p>Separation Between Farington, Lostock Hall and Penwortham</p> <ul style="list-style-type: none"> <li>• Household waste depot to the south</li> <li>• Various ponds and landscape features to the south</li> </ul>	<p>Farington and Bamber Bridge, to the main population centres of South Ribble and the M65/M6/M61 Junctions some 2 km to the east. It provides an expansion opportunity for the nearby Lancashire Business Park which, unlike site SR/EP1.5 is not tied to any one business. Its prominent position on a main A-Road, close to Motorway Junctions would suit a B2/B8 logistics development where prominence and access is a key factor in businesses property requirements. As noted, despite more challenging market conditions there remains good demand for local/strategic scale B2/B8 space, evidenced locally by the recent successful development</p>	<p>here and a site some 400 metres to the south, Farington Park, has been successfully developed speculatively for larger B2/B8 uses over the last two years, particularly for a 50,539 sqm B8 unit (NW.544) (App. No. 07/2020/00781/OUT).</p>		

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
					Farington Park as a speculative logistics scheme.			
SR/EP1.5 (19S188) Previous Local Plan Site E1(d)	North of Lancashire Business Park, Farington	9.20	No identified plans	<ul style="list-style-type: none"> <li>• Trees on site</li> <li>• River Lostock crosses the west of the site, possible flood risk in places</li> <li>• Small pond on site.</li> </ul>	Large regular area of land on the edge of the established Lancashire Business Park. The Business Park is a focus for B2/B8 investment into the Borough and home to a range of established large companies. The land would support further expansion of industrial and warehouse uses here on a prominent gateway site.	Ownership means that it is likely to be held as expansion land for adjacent Leyland Trucks. However, the land is outside of Leyland Trucks' secure site and could be made available to other occupiers. Bridging the River Lostock would be an additional cost to any development, which could generate viability issues. However, the bulk of the site would be developable without crossing the river.	9.20	Yes
SR/EP1.6 (19S190) Previous Local Plan Site E1(f)	Land Adjacent to Leyland Business Park, Farington	2.10	Ainscough Properties own. Land let to Ainscough Cranes for 14 years from 2010. Currently in use for open storage and the parking of cranes. No further plans identified.	-	Growth opportunity site within an established local industrial estate which falls within the main employment location of Farington and Leyland. The land is somewhat peripheral within Leyland Business Park but would	Land in use at present but remains available for development with no significant constraints. Ultimately delivery would be dependent on the plans of the owner. It would be well placed to support growth within the	2.10	Yes

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
					support a development of light industrial units, building on the existing critical mass of businesses in the estate. Demand remains strong for smaller industrial units, with an continuing body of businesses with finds to invest. Light industrial developments will take up infill sites like this one.	Business Park, when needed.		
<b>Mixed-Use Local Sites</b>								
SR/EP1.4, SR/HS1.8 (19S166) Previous Local Plan Site C2	Moss Side Test Track, Leyland (Titan Business Park)	44.8 gross (4 ha identified for commercial uses)	App. No. 07/2017/3361/ORM for the whole test track site was approved November 2019. This was a Hybrid planning application comprising: <ul style="list-style-type: none"> <li>• Full Consent for 197 dwellings and associated internal access roads and infrastructure</li> <li>• Outline Consent for 653-753 new homes; up to 5,000 sqm of E(g)</li> </ul>	Site cleared and remediated so assumed none.	New mixed business park proposed, building on the critical mass of the Moss Side Employment Area. Development is expected to focus on small-medium sized industrial and warehouse units, mostly sub-2,000 sqm in size, which are identified as still in good demand. It also reflects equivalent successful developments underway in Chorley	Development is consented and under developer control. The scheme has been marketed off-plan and is attracting interest. The site has been fully remediated, and construction is set to commence in Autumn 2023 with the first units anticipated to be available in Quarter 1 of 2024.	5.70 (Area consented for commercial use)	<b>Yes</b>

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
			<p>business uses; up to 15,000 sqm of B2 and up to 8,000 sqm of B8, a local centre, a primary school and associated open space</p> <p>A further consent (App. No. 07/2021/00354/FUL) for:</p> <ul style="list-style-type: none"> <li>• Outline element for development of a petrol filling station, restaurant drive thru and for development of buildings with flexible uses within classes B2, B8 and E (access applied for)</li> <li>• Full element for development of buildings with flexible use within classes B2, B8 and E with access roads and landscaping.</li> </ul> <p>A large portion of the initial housing consent has now been delivered as</p>		<p>Borough, including Botany Bay Business Park. Agents for the scheme report that the development has attracted very strong interest from both potential buyers for the units and businesses wanting to lease.</p>			

Site Ref (SHELAA Ref(s).)	Site Name	Proposed Site Area, ha	Any Identified Development Plans	Constraints	Market Fit	Deliverability	Realistically Available supply, ha	Available to meet Long term needs (Yes/No/Maybe)
			<p>Centurion Park. Reserved Matters consent being sought on the business park site (App. No. 07/2023/00293/REM) plus various Discharge of Conditions Consents being sought. Business Park site is cleared and premises are on the market for 17 main blocks of E(g), B2, B8 uses of 65-2,322 sqm each. Agents for the scheme report strong demand for units of up to 1,000 sqm, from local firms.</p>					

Source: SRBC and BE Group, 2023

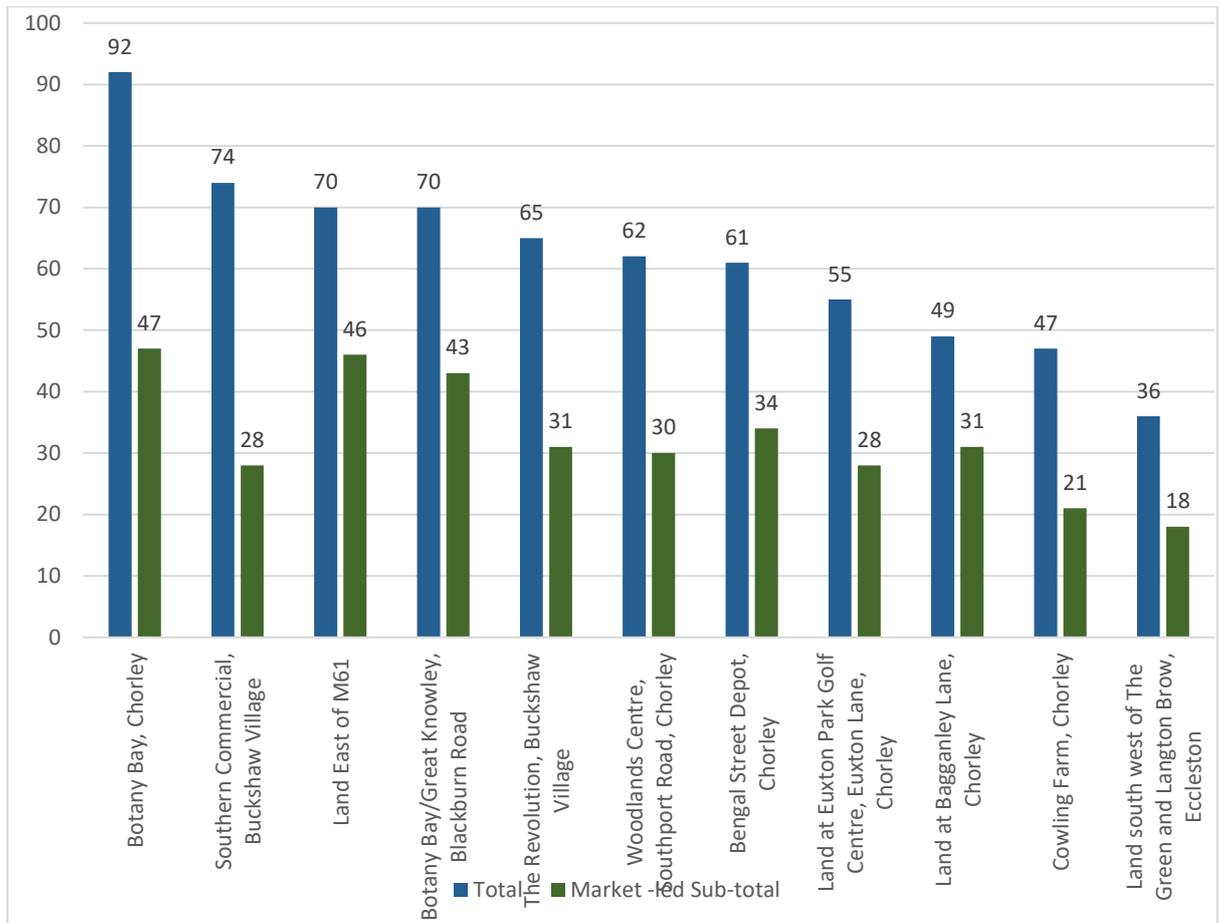
### *South Ribble*

- 4.16 Overall, there appear few barriers to delivery of any of the sites put forward to meet employment needs in South Ribble. Site SR/EP1.7 (SRBC001): Sablesbury Enterprise Zone has seen a range of developments completed to date, mostly supporting the adjacent BAE facilities. It is also now proposed for the new campus for the National Cyber Force. Site SR/EP1.2, SR/HS1.1 (19S052): Cuerden Strategic Site now has Outline planning consent and developer partners secured. Local sites are focused around Farington and area where local B2/B8 development has successfully been progressed and is still being brought forward at Site SR/EP1.4, SR/HS1.8 (19S166): Moss Side Test Track, Leyland (Titan Business Park).
- 4.17 Based on net developable areas, planning consents sought, etc. the strategic sites put forward could provide some 66.93 ha of employment land. Another 23.14 ha is put forward in the main local sites to which 5.70 ha of consented commercial space at Site SR/EP1.4, SR/HS1.8 (19S166): Moss Side Test Track, Leyland (Titan Business Park) could be added.

### **Sites Quantitative Analysis**

- 4.18 In addition to the above qualitative analysis, all sites have been graded using a standard scoring system that consists of objective measures (as far as possible). Each site is scored out of a 100, made up of ten individual measures, each scored out of ten. These are: proximity to the strategic highway network, proximity to key local routes, prominence, access to public transport, planning status, access to services, constraints, environmental setting, flexibility and availability. The scoring system and the detailed scores are provided in Appendix 3 and 4.
- 4.19 Two scores are provided in Figures 22 to 25 a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic and key local highway proximity, prominence environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are easier to improve and hence provide the ability to raise the quality of a site.

**Figure 22 – Employment Sites Scoring – Chorley Sites**

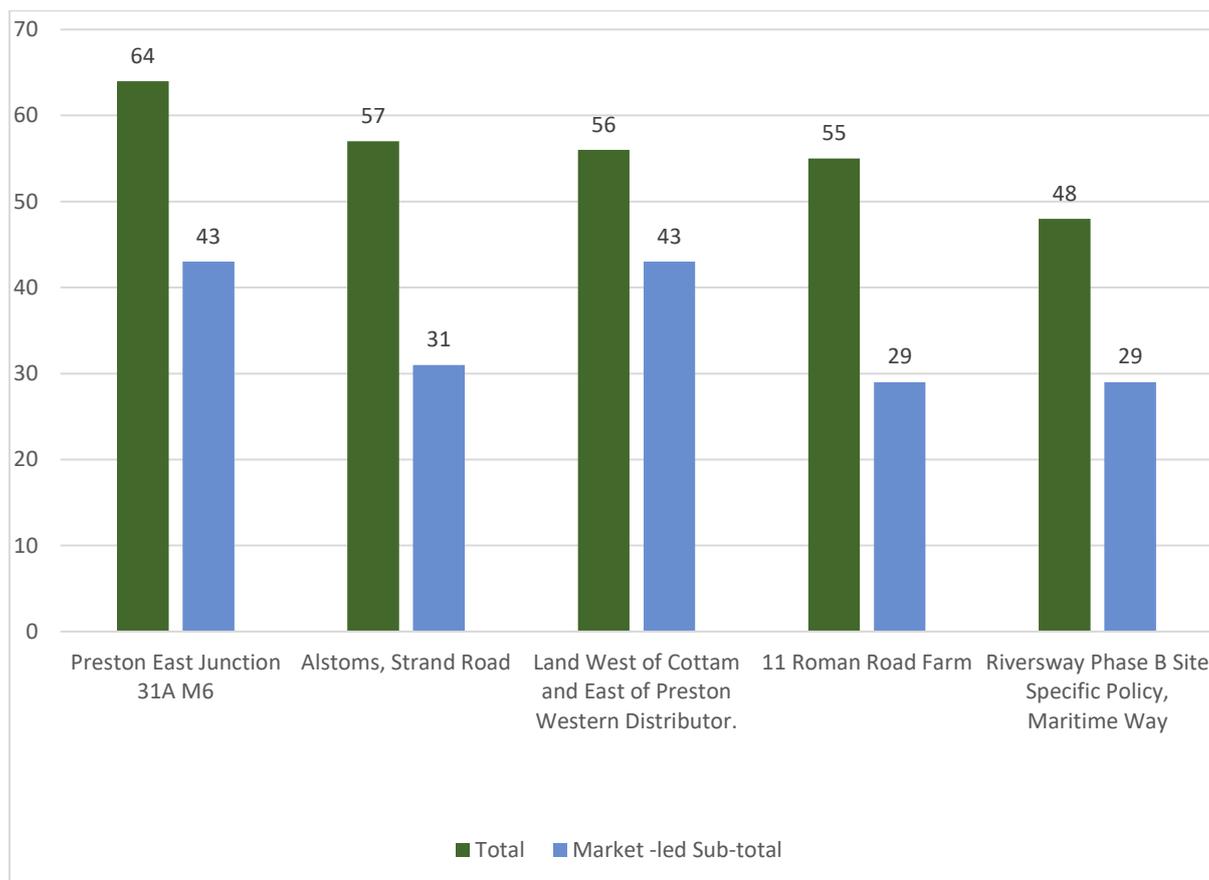


Source: BE Group, 2023

4.20 In Chorley, in terms of the Preferred Sites (Figure 22), plots in the Buckshaw Village and Botany Bay/Great Knowley area score well, reflecting their size, flexibility, proximity to the motorway network/local train station and the fact that most are seeing some plans for development being actively progressed. Weaker scoring sites are generally the more isolated plots of Cowling in Chorley and in Eccleston which represent longer term options for growth.

4.21 Figure 23 shows the scoring results for Preston. In this case, sites which cannot meet needs as they are in an existing Employment Area/in use are excluded. Of the remaining sites Preston East Junction 31A M6 scores best, reflecting its position on the M6 Corridor, lack of constraints and good development prospects. Riversway Phase B Site Specific Policy, Maritime Way scores lowest, reflecting its backland position and greater range of physical constraints.

**Figure 23 – Employment Sites Scoring – Preston Preferred/Mixed Sites**



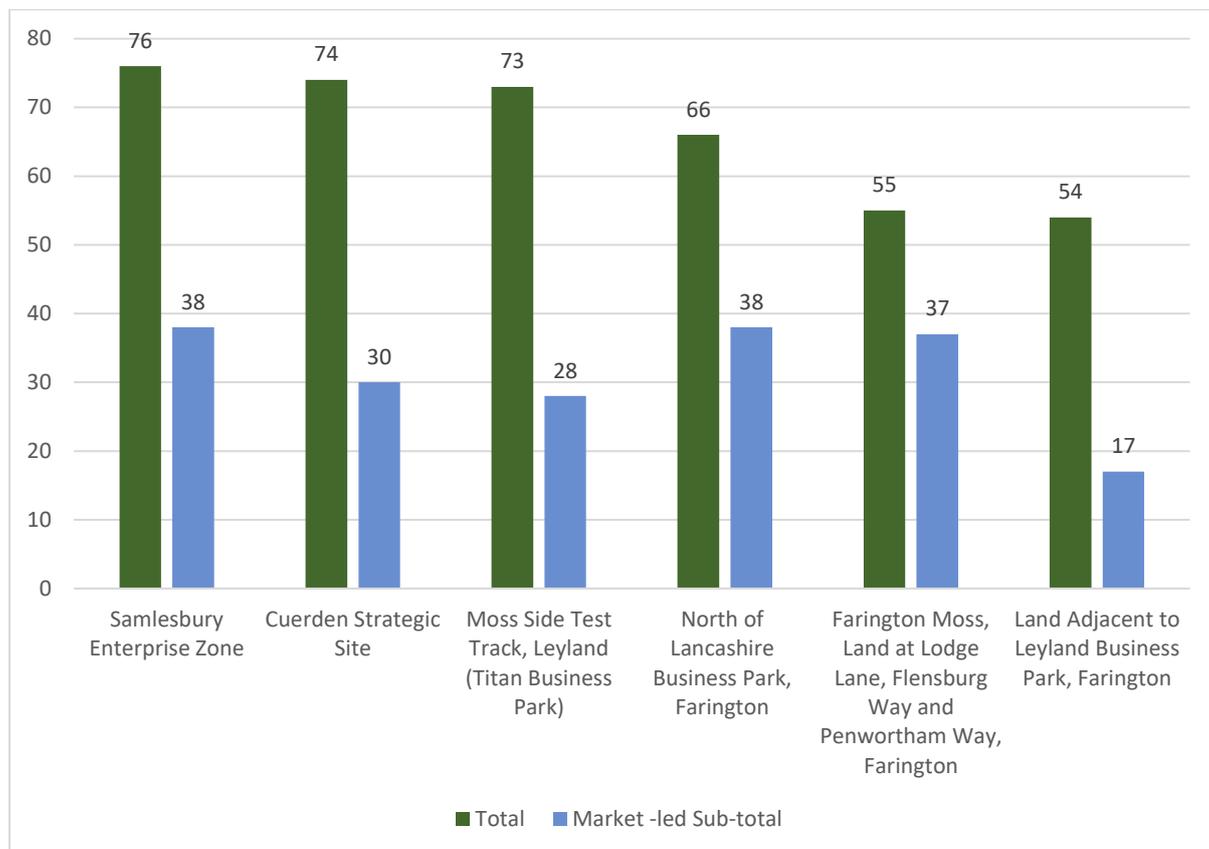
Source: BE Group, 2024

4.22 In terms of the Preston sites, the sites put forward can be related to the classification of land used in the existing Local Plan and past Employment Land Study, namely that sites can be categorised as Best Urban, Good Urban or Other Urban. The above scoring can be linked to that categorisation using the following assumptions:

- Any site scoring 70-100 overall = Best Urban
- Any site scoring 50-69 overall = Good Urban
- Any site scoring 0-49 overall = Other Urban.

4.23 In terms of the South Ribble sites (Figure 24), Site SR/EP1.7 (SRBC001): Samlesbury Enterprise Zone and Site SR/EP1.2, SR/HS1.1 (19S052): Cuerden Strategic Site score best reflecting the strong location of these strategic sites and their good prospects for delivery. The weakest scoring site is Site SR/EP1.6 (19S190): Land Adjacent to Leyland Business Park, Farington which falls into the backlands of an established local industrial estate.

**Figure 24 – Employment Sites Scoring – South Ribble Preferred Sites (Strategic and Local)**



Source: BE Group, 2023

### Summary

- 4.24 This Section has considered the land supply put forward to meet employment land OAN through SHELAA, Call for Sites, etc. exercises in Chorley, Preston and South Ribble, considering site deliverability, market fit and site constraints.

#### Chorley

- 4.25 For Chorley 11 sites totalling 62.51 ha, of which 34.09 ha is specifically proposed for employment uses, have been identified as ‘Preferred’ to meet needs. Within this, six sites totalling 27.03 ha (79.3 percent) falls within the core Buckshaw Village/Botany Bay/Great Knowley market area, a focus for recent and ongoing development activity. Development plans are being actively progressed on several sites. Other sites are comparably well located in, and around Chorley town and well placed to meet industrial and warehouse needs. The only two sites where questions of deliverability can be raised are:

- Site CH/EP1.9 (19C050); Land at Euxton Park Golf Centre, Euxton Lane, Chorley – The most likely use for this site would be development to meet the needs of the landowner GA Pet Foods. However, GA will likely seek to redevelop the full 8 ha Euxton Park Golf Range.
- CH/HS1.37, CH/EP1.11 (19C411): Land south west of The Green and Langton Brow, Eccleston – The site is presently in full use and has constraints including areas in Flood Risk and a historic Mill covering a large part of the site. It is unclear what the net developable area here would be.

4.26 Subject to the above issues though, the sites put forward appear deliverable.

4.27 In terms of quantitative scoring, the best scoring Preferred sites are the plots in the Buckshaw Village and Botany Bay/Great Knowley area.

#### *Preston*

4.28 Preston is considering 11 sites specifically for employment uses, totalling 92.12 ha. The strongest options, in market terms would be the two sites totalling 50.25 ha which fall into the North East Preston Employment Area a core market location for the City. The sites are subject to active plans for development.

4.29 Overall, some 73.73 ha appears available for employment uses on sites which appear deliverable and capable of meeting market demand, and which have not previously been allocated for employment.

4.30 A substantial mixed-use site is put forward east of the new A582 Western Distributor Road – Site 19P031: Land West of Cottam and East of Preston Western Distributor. At 126.65 ha overall, this would represent a sizable extension of the Preston settlement area and one where development is likely to be housing led. The site thus first needs to be assessed on this basis. Assuming a large scale employment site can be provided here, comparable to the 50 percent (63.3 ha) put forward, it would again most likely support larger B2/B8 uses. Some 2 km south of the new M55 Junction, this would be a reasonable location for such uses, which will prioritise strategic road access. It would not necessarily be superior in this regard to locations in North East Preston which would have direct M6 access however (albeit only to the southern junction accesses of Junction 31a).

- 4.31 In terms of Quantitative scoring of the available sites, Preston East Junction 31A M6 scores best, reflecting its position on the M6 Corridor, lack of constraints and good development prospects. Riversway Phase B Site Specific Policy, Maritime Way scores lowest, reflecting its backland position and greater range of physical constraints.

*South Ribble*

- 4.32 South Ribble is proposing three local sites specifically for employment uses, totalling 23.14 ha alongside the strategic Samlesbury Enterprise Zone with a gross size of 142.96 ha. Also, the mix use Moss Side Test Track (44.8 ha gross) and the Cuerden Strategic Site, another 66 ha. There appear no significant barriers to development on any of the sites with proposals being progressed on the two Strategic locations and the local sites falling within the core market area of Farington.
- 4.33 On Site SR/EP1.2, SR/HS1.1 (19S052): Cuerden Strategic Site some 31.93 ha is realistically available to meet employment needs, based on data in existing planning applications. On Site SR/EP1.7 (SRBC001): Samlesbury Enterprise Zone the net developable area of Enterprise Zone land within the Borough is understood to be 35 ha although that is gross of completions and including land for the National Cyber Force Campus. At SR/EP1.4, SR/HS1.8 (19S166): Moss Side Test Track, Leyland (Titan Business Park) the area consented for commercial uses is 5.70 ha. The revised local supply, inclusive of Moss Side Test Track, is thus 28.84 ha.
- 4.34 In terms of quantitative scoring, Site SR/EP1.7 (SRBC001): Samlesbury Enterprise Zone and Site SR/EP1.2, SR/HS1.1 (19S052): Cuerden Strategic Site score best reflecting the strong location of these strategic sites and their good prospects for delivery.

## 5.0 CONCLUSIONS

### Introduction

- 5.1 This Study provides a partial update of the Central Lancashire Employment Land Study (ELS), produced in 2022 by BE Group. It reviewed the potential future employment land supply of the three local authorities, in the light of changing market conditions. It also undertook a revised OAN calculation for the updated CLLP period of 2023-2041, utilising an updated methodology.

### Property Market Update

- 5.2 An analysis of the local and regional/national property markets for industrial, warehouse and office markets suggest the following trends which relate to the demand for employment land and premises over the CLLP period:

#### *Industry*

- The national manufacturing sector boomed over 2020-2021. Demand reduced somewhat in the second half of 2022 in the face of growing economic uncertainties, but 2022 remained one of the strongest years on record in terms of the take up of industrial stock
- The market has proved resilient in 2023, despite growing economic uncertainties. In Central Lancashire, this is evidenced by the recent commencement/completion of several private sector B2/B8 schemes including Botany Bay Business Park in Chorley, units at Preston East and Farington Hall in South Ribble, with further phases of both in the pipeline. Nationally, the industrial market has seen continuing requirements from manufacturers for new build high grade space, both from local firms and larger companies seeking to re-shore and safeguard their supply chains within the UK.
- Industrial demand is projected to remain strong in the short term, even if macro-economic conditions prove worse than forecast. If the economic constraints of 2023 do turn into a prolonged recession this will inevitably inhibit demand although not for the whole plan period – the last major recession limited the property market for some six years, 2008-2013, and was followed by a strong recovery

- Local market stakeholders added that while economic issues mean that industrial/warehouse units are less attractive to investors but there remains strong demand from occupiers, for properties of up to 2,000 sqm each and particularly sub-1,000 sqm units. It can also be noted that the sub-region has gained, mostly micro sized, manufacturing and construction businesses in recent years, despite local losses in employment numbers
- Foci for demand include Buckshaw Village, Euxton Lane and Botany Bay in Chorley; Bamber Bridge in South Ribble and North East Preston/Riversway in Preston.
- Against demand, and even with recent completions of new schemes, the sub-region has a limited supply of premises to meet forward needs, some 8.8 months of forward industrial supply by units, 6.5 months by floorspace, based on past average rates of take up per year. Against total stock, vacancy rates across Central Lancashire are well below 5 percent, which also suggests supply shortages.

***Thus, while some slowdown in the industrial market is possible in the short term, if economic conditions deteriorate, overall demand remains strong, particularly from smaller occupiers for sub-2,000 sqm units. With reasonable demand and a limited supply, developers are continuing to bring forward industrial schemes in core areas of market interest with no sign of a slowing in the pipeline.***

### ***Warehousing***

- Across the UK, demand for logistics premises increased significantly in 2020-2022 in response to the changing consumer behaviour. After three years of record breaking take up, stakeholders expect transaction rates in 2023 to be more moderate, but still well above the 10-year average.
- Reflecting national trends, Transport and Storage has been a growth sector Central Lancashire, gaining jobs and some 250 businesses over the last five years
- While reduced consumer spending may inhibit demand from retailers moving forward, logistics requirements are now coming from an increasingly diverse range of occupiers
- While logistics growth will continue to be focused on prime locations on the motorway corridors, supply shortages will encourage the take up of good secondary locations as well. In Central Lancashire, all three local authorities have large sites close to motorway junctions which can benefit from ongoing

demand for larger B8 uses.

***Thus, while B8 demand may see relative decline from the record breaking period of the early 2020's, a good interest in warehousing units is expected to continue, on locations with reasonable strategic road access.***

### **Offices**

- During the 2020-2021 lockdowns, office-based firms adjusted to being able to work remotely and evidence is that the majority of office-based businesses continue to offer at least hybrid working options to some of their staff. Reflecting this trend, businesses are increasingly seeking flexibility in their office accommodation. This new way of working favours serviced offices, co-working spaces and similar models over unserviced options. Demand exists for more such serviced space, but primarily on sites with good motorway access rather than town or city centres. In Preston, demand is focused on Preston Docks rather than the City Centre
- For larger floorplate offices, in the light of changing working practices, established businesses have reviewed their long-term accommodation needs leading to a rationalisation of space with poorer quality accommodation returning to the market, while more modern offices are occupied
- The net result is that there is a surplus of lower grade stock while more higher grade stock is needed. The surplus issue is made worse by the fact that around 12 percent of the UK's office stock are graded below EPC band E and will not meet future energy efficiency standards. Given demand, some buildings may be suitable for upgrading to accommodate service stock, but many others will become 'stranded assets' – unable to be let out in their current condition and unable to secure a large enough rent to make investment worth it. There is likely to be considerable pressure to convert some of this stock into other uses, using Permitted Development Rights moving forward, leading to a net loss of stock. However, as this stock is surplus to business needs, its loss is unlikely to leave businesses without the space they need and therefore prompt development elsewhere. Against total stock, vacancy rates across Central Lancashire, except for in South Ribble, are mostly in the 5-10 percent range, which also suggests there is sufficient stock to meet most needs.
- Average office rents do not exceed £14.50/sqft (£150/sqm), even in Preston

City Centre and key business parks, with £10-11/sqft (£108-118/sqm) more the norm in Preston and South Ribble (slightly higher in Chorley). This can be compared to £25/sqft (£269/sqm) for good grade A accommodation. Thus, stock in Central Lancashire does not see particularly high rents and stakeholders do not identify affordability as a particular barrier to occupancy anywhere in Central Lancashire

- Past take up and present stated market demand is for 0-500 sqm units, including freehold options and particularly Grade A options, alongside a modest number of larger requirements. However, viability remains a significant barrier to new development.

***Recent office sector growth has been limited in Central Lancashire and changing working practices have affected, and will continue to affect demand, particularly for larger floorplate offices. While some demand exists, particularly for sub-500 sqm serviced units, viability will be a significant barrier to further new build office development moving forward. Accordingly, large scale office development is not assumed on any of the sites reviewed in this Study.***

- 5.3 While large scale office development appears unlikely in the present market, this does not necessarily mean that the office jobs increases projected in the Cambridge forecasting for the 2022 ELR will not be achieved. Office-based businesses will continue to grow and expand to 2041, and greater use of hybrid working may allow them to accommodate greater numbers of staff in their existing premises. Modern industrial and warehousing operations accommodate increasing numbers of office workers. For example, in its 2023 publication “*Critical Infrastructure: Driving Employment Growth within the UK’s Logistics Sector*” logistics developer Prologis identified that an average 500,000 sqft (46,450 sqm) B8 warehouse unit will employ some 67 office-based administrative staff and another 45 managerial staff.

#### **Objectively Assessed Needs**

- 5.4 This Study was asked to provide an updated OAN forecast model for Central Lancashire to reflect the revised CLLP period 2023-2041. Also to reflect the most up to date methods for modelling employment land needs, consistent with the National Planning Policy Framework and Planning Practice Guidance, as well as the precedents and findings of recent Local Plan Examinations in Public.

- 5.5 There is no definitive model for forecasting future employment land need. Here future employment land provision has been assessed using a projection forward of historic land take-up as well forecasts based on employment sector and population change.
- 5.6 The methods applied here are 'Policy Off' in that they make no allowance for any major public sector programmes which might generate jobs above the baseline. The 2017 and 2019 Central Lancashire Employment Land Studies incorporated 'Policy On' Scenarios considering the extra jobs estimated to be created by the Samlesbury Enterprise Zone and City Deal programmes in Preston and South Ribble. However, the Enterprise Zone jobs estimates are now 13 years old and the City Deal estimates a decade old, with most City Deal projects now at least partly implemented. While there are other strategic projects proposed in Central Lancashire, at this time, most notably the development of the National Cyber Security Centre at Samlesbury, there are no clear forecasts of the jobs growth resulting from these schemes which could inform a Policy On forecast. For this reason, a Policy On Scenario, relating to any active local programme is not undertaken here.
- 5.7 Two main forecast options have been produced and considered for Chorley, Preston and South Ribble.
- 5.8 Model One is Past Take Up, the forward projection of historic take up across Central Lancashire since 2010/2011. Figures both gross and net of losses have been provided by the Councils and any issues with the data are considered in Section 3.0.
- 5.9 Model Two is Labour Demand, a baseline or Policy-Off forecast which, as mentioned, makes no allowance for major public policy interventions in Central Lancashire. This scenario uses as its base the latest economic forecasts (winter 2023/2024), produced by Cambridge Econometrics for LCC and covering the Central Lancashire sub-region. These forecasts are the latest available projection on macro-economic conditions and are used in other evidence base research for the CLLP. The Cambridge forecast projects the following growth, over 2023-2041, in Central Lancashire:
- Chorley: 5,675 extra jobs
  - Preston: 5,493 extra jobs
  - South Ribble: 5,492 extra jobs
  - *Central Lancashire Combined: 16,660 extra jobs.*

5.10 To use these figures to forecast OAN in Central Lancashire, several adjustments must be made to allow for real world conditions:

- An allowance is made for part time working in the labour force, by converting the forecasts for total employment, by sector, into forecasts for Full-Time Equivalent (FTE) jobs by sector. This is achieved through an analysis of the proportion of full-time and part-time jobs in Central Lancashire as of 2022, using BRES data. By forecast period the FTE jobs change is projected to be:
  - Chorley: 3,788 extra jobs
  - Preston: 3,533 extra jobs
  - South Ribble: 3,790 extra jobs
  - *Central Lancashire Combined: 11,111 extra jobs.*
- The second consideration is homeworking, which affects the number of new jobs which need to be accommodated in commercial premises, and therefore need employment land. The 2021 Census identified the following homeworking rates in Central Lancashire, mostly impacting on office based sectors:
  - Chorley: 29.0 percent
  - Preston: 24.9 percent
  - South Ribble: 28.8 percent
  - *Central Lancashire Combined: 27.4 percent.*

Reducing the relevant, office-based, sectors by the above proportion, to exclude jobs which would be mostly home based reduces the FTE employment growth to:

- Chorley: 3,258 extra jobs
- Preston: 3,009 extra jobs
- South Ribble: 3,135 extra jobs
- *Central Lancashire Combined: 9,401 extra jobs.*

However, 2021 Census data was collected at a time when the UK was still experiencing lockdowns associated with the Covid-19 Pandemic, it may therefore exaggerate present homeworking rates. Stakeholders argue that homeworking and particularly hybrid working is continuing in office based businesses locally although it they were unable to define the exact amounts of contemporary, or future, home based working. Reflecting this uncertainty, scenarios are presented with and without a deduction for homeworking.

5.11 The FTE jobs change figures are converted into a floorspace and land need using standard estimates of jobs density, the floorspace each job requires, and estimates of

what proportion of the jobs will be accommodated in E(g)/B-Class property. When the resulting land needs from the office, industrial and warehouse sectors are combined, the following OAN can be identified, with and without a deduction homeworking (see Table 45).

**Table 45 – Forecast Outputs, Hectares**

Use	Chorley	Preston	South Ribble
<b>Gross of Homeworking</b>			
Office (inc. Research and Development) Land Need	6.7	6.2	6.1
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>6.1</b>	<b>5.1</b>	<b>3.3</b>
<b>Net of Homeworking</b>			
Office (inc. Research and Development) Land Need	5.1	4.8	4.6
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>4.5</b>	<b>3.7</b>	<b>1.8</b>

Source: BE Group, 2024

- 5.12 However, the net outputs are severely limited by the large declines in manufacturing employment predicted in the model, which does not reflect a real world position in which manufacturing firms may seek growth for a range of reasons unrelated to how many they employ. Accordingly, there is a case for excluding the industrial change in this scenario and looking at the office and warehouse forecasts, where growth is projected. The baseline model outputs are set out in Tables 46 and 47.

**Table 46 – Central Lancashire OAN Projections – Past Take Up Model, Hectares**

Use	Chorley			Preston			South Ribble		
	Historic Take-Up 2010/11-2021/23	Average Take Up Rate, Ha/year	OAN Need 2023-2041 (x19 years)	Historic Take-Up 2010/11-2023/24	Average Take Up Rate, Ha/year	OAN Need 2023-2041 (x19 years)	Historic Take-Up 2010/11-2023/24	Average Take Up Rate, Ha/year	OAN Need 2023-2041 (x19 years)
<b>Gross of Losses</b>									
Office (inc. Research and Development and Mixed E(g) Take up) Land Need	6.52	0.50	<b>9.53</b>	3.31	0.25	<b>4.84</b>	8.91	0.69	<b>13.02</b>
Industrial (Inc. Light Industry and Mixed Use) Land Need	24.7	1.90	<b>36.10</b>	11.31	0.87	<b>16.53</b>	19.31	1.49	<b>28.22</b>
Warehouse Land Need	6.58	0.51	<b>9.62</b>	19.34	1.49	<b>28.27</b>	23.24	1.79	<b>33.97</b>
<b>Total</b>	37.81	2.91	<b>55.26</b>	33.96	2.61	<b>49.63</b>	51.46	3.96	<b>75.21</b>
<b>Net of Losses</b>									
Office (inc. Research and Development and Mixed E(g) Take up) Land Need	-2.57	-0.20	<b>-3.76</b>	1.91	0.15	<b>2.79</b>	5.25	0.40	<b>7.67</b>
Industrial (Inc. Light Industry and Mixed Use) Land Need	9.25	0.71	<b>13.52</b>	5.8	0.45	<b>8.48</b>	2.33*	0.18	<b>3.41</b>
Warehouse Land Need	4.17	0.32	<b>6.09</b>	18.37	1.41	<b>26.85</b>	16.34	1.26	<b>23.88</b>
<b>Total</b>	10.86	0.84	<b>15.87</b>	26.08	2.01	<b>38.12</b>	23.92	1.84	<b>34.96</b>

Source: BE Group, 2024

\*Excludes the exceptional 2017-2018 loss. Including it adds a further 54.17 ha to the B2 losses figures, i.e. -51.84 ha or -3.99 ha/year = OAN need of -75.81 ha over 2023-2041.

**Table 47 – Central Lancashire OAN Projections – Labour Demand Models, Hectares**

Use	Chorley	Preston	South Ribble
<b>Gross of Homeworking</b>			
Office (inc. Research and Development) Land Need	6.7	6.2	6.1
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>6.1</b>	<b>5.1</b>	<b>3.3</b>
<b>Net of Homeworking</b>			
Office (inc. Research and Development) Land Need	5.1	4.8	4.6
Industrial Land Need	-2.6	-2.6	-5.5
Warehouse Land Need	2.0	1.5	2.7
<b>Total Land Need</b>	<b>4.5</b>	<b>3.7</b>	<b>1.8</b>

Source: BE Group, 2024

5.13 To translate the baseline need figures into a preferred OAN, several further assumptions on land need have to be considered:

- **Vacancy:** It is widely accepted that 5-10 percent vacancy is required at all times in commercial markets, to ensure churn and choice for companies, allowing innovation, inward investment, resizing of existing business requirements and refurbishments. BE Group have therefore assumed a need to achieve a 7.5 percent vacancy rate within the local stock, a mid-point between 5-10 percent, to achieve a well-functioning commercial property market. All three Central Lancashire local authorities have vacancy rates well below 7.5 percent and Table 48 shows the additional floorspace and land which would be needed to achieve such a vacancy rate the industrial/warehouse stock. A further allowance to increase vacancy in the office market is not considered necessary given uncertainties around office demand post the Covid-19 Pandemic and the difficulties in viably delivering private sector office stock.

**Table 48 – Allowance for Industrial/Warehouse Vacancy**

Local Authority Area	Total Industrial/Warehouse Floorspace, sqm	2023 Vacancy Rates, Percent	2023 Vacancy Rates, Floorspace*	Additional Floorspace Needed to Achieve 7.5 percent Vacancy, Sqm	Additional Land Needed, to Achieve 7.5 percent Vacancy, ha**
Chorley	603,000	1.3	8,135	37,386	9.35
Preston	943,000	2.5	23,339	47,150	11.79
South Ribble	1,111,000	1.5	16,337	66,660	16.67
<b>Total/Average</b>	<b>2,657,000</b>	<b>5.3</b>	<b>47,811</b>	<b>151,196</b>	<b>37.80</b>

Source: VOA and BE Group, 2023

\*Vacant and marketed as of Summer 2023

\*\*Assumes 4,000 sqm/hectare

- *Displacement:* . This refers to major redevelopment projects that will displace existing office, industrial or warehouse businesses, companies that will need to be relocated locally, generating land and premises requirements additional to baseline OAN. At this time there are no strategic projects, in Chorley, Preston or South Ribble, which are likely to displace large numbers of local firms.
- *Buffer:* A buffer in supply should be applied to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the forecast period. Consistent with past research in Central Lancashire, a buffer of 5 years is applied.
- *Replacement Demand:* However, not all losses automatically need to be replaced. While some losses may solely reflect the desire of landowners to convert sites/buildings to higher value uses, the properties lost may also be of a specification, quality, tenure or in a location that is no longer desired by the market. In the case of Preston, a key issue will be the loss of office stock, in and around the City Centre. Available monitoring data indicates that between 2016 and 2023, the City Centre lost 20,081 sqm (or 18,851 sqm net of gains), with more losses in the pipeline. VOA data suggests that since 2015, the stock of offices across Preston District, has reduced by 69,000 sqm or 7.5 percent, to 322,000 sqm in 2023. Industrial stock also declined by 48,000 sqm, or 5.1 percent, over 2016-2023, to 943,000 sqm. While some of this lost stock will have been surplus to market needs, given the scale of these losses, and the likely economic impacts resulting, it is recommended that Gross Take Up

figures be applied. This assumes that the city should seek to replace as much of this lost stock as possible to maintain the range and quality of its offer to businesses.

- By comparison office and industrial stock rates have been more static in South Ribble and even grown, in terms of industry, in Chorley. Experience, across multiple Employment Land studies completed by BE Group since 2017 suggests that neither local authority area has particular problem with large amounts of vacant and surplus stock, as demonstrated by the low vacancy rates discussed above. Thus, it is likely that if the individual buildings recorded lost in the above Take Up data, for Chorley and South Ribble, were still needed by the market, they would have been occupied. Reflecting this, it is the view of this Study that Net Take Up rates should be applied in the case of Chorley and South Ribble, making the assumption that day to day losses do not need to be replaced.

5.14 **In terms of a preferred OAN for offices**, experience suggests that the quantum of office space required by businesses is strongly driven by the number of staff they have to accommodate. Thus, the jobs-based Labour Demand model is likely to best project office sector needs moving forward. As the majority of projected jobs growth is in office based sectors, utilising Labour Demand modelling for offices also means that OAN will account for the bulk of the employment change moving forward.

5.15 Discussions with stakeholders suggest that some two years after the end of the Covid-19 Pandemic and associated Lockdowns, homeworking and hybrid working practices are here to stay with impacts on the quantum of space businesses need. While it is not possible to say exactly how working practices will evolve to 2041, Labour Demand models with an allowance for homeworking are more realistic at this time. Thus, the recommended office sector OAN is set out in Table 49, including the assumptions applied.

**Table 49 – Recommended OAN for Offices**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	6.48	Labour Demand, net of homeworking Inclusive of Buffer equating to an extra 5 years
Preston	6.00	
South Ribble	5.76	
<b>Total</b>	<b>18.24</b>	

Source: BE Group, 2024

- 5.16 In terms of Preston, it is accepted that using the Labour Demand model for office OAN does not fully account for the loss of office premises in central Preston. However, that is arguably true of the Take Up Modelling, which is based on completions from the EP1 Employment Areas only. Labour Demand modelling at least uses data for the whole local authority area rather than being limited to the main Employment Areas. Additionally, the 5 year buffer is relied upon here to provide a degree of flexibility to account for losses of office space in the City while also providing space to accommodate the forecast future growth in the workforce, which is projected to be mostly in sectors requiring E(g)(i) accommodation. A larger office OAN may also prove hard to deliver given ongoing constraints in viably developing new office stock.
- 5.17 **Requirements for industrial and warehouse premises** are more driven by needs for production and storage space than the need to accommodate changing staffing levels. Thus, such companies may have ongoing property requirements even when they are reducing the numbers they employ, particularly if automation is improving productivity per worker. Industrial and warehouse companies are also more likely to acquire and hold onto expansion land and premises, even in times of contraction in the business, than office sector companies, in anticipation of future growth. This results in a weaker link to the jobs-based Labour Demand modelling that was true for offices. Additionally, the Labour Demand model forecasts negative or negligible land needs in the industrial sector, in Central Lancashire, which is at odds with identified market demand and the almost exclusively industrial pipeline of development identified on local employment sites.
- 5.18 Here, therefore, the Past Take Up model is preferred as it is independent of jobs change projections and based on real world trends. It accounts for periods of growth and recession in the local economy since 2000, allowing that such economic growth and decline will continue to 2041. It is thus likely to be better in tune with real market demand than the Labour Demand model. The recommended industrial/warehouse OAN is set out in Table 50 including the assumptions applied.

**Table 50 – Recommended OAN for Industrial/Warehouse**

Local Authority Area	OAN Figure, hectares	Assumptions Applied
Chorley	34.97	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 19.61 ha A further Buffer of 5 years is applied on the Baseline figure An additional 9.35 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
Preston	68.43	Baseline in the Take Up modelling, Gross of Losses (to provide allowance for the scale of industrial/warehouse losses recorded), for Industrial/Warehouse Uses only = 44.80 ha A further Buffer of 5 years is applied on the Baseline figure An additional 11.79 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
South Ribble	51.23	Baseline in the Take Up modelling, Net of Losses, for Industrial/Warehouse Uses only = 27.29 ha A further Buffer of 5 years is applied on the Baseline figure An additional 16.67 ha is included to achieve a vacancy rate of 7.5 percent and give greater choice for businesses
<b>Total</b>	<b>154.63</b>	

Source: BE Group, 2024

5.19 The combined OAN, linking office and industrial/warehouse needs, is therefore:

- **Chorley – 41.45 ha**
- **Preston – 74.43 ha**
- **South Ribble – 56.99 ha**
- **Central Lancashire combined – 172.87 ha.**

5.20 This OAN calculation produces a need level some 52 ha lower than that in the 2022 ELS, when a Central Lancashire OAN of 225.06 ha was identified. The main need reductions are for Chorley (from a 2022 OAN of 76.34 ha) and South Ribble (from a 2022 OAN of 77.66 ha). By comparison, need in Preston increases slightly (from a 2022 OAN of 71.06 ha). **However, it is important to emphasise that this Study has used a differing methodology for calculating the OAN, to previous research, to a differing forecast period. The figures given here are thus not directly comparable to those in past Central Lancashire ELS studies.**

5.21 The OAN of 172.87 ha from this study can be compared to the supply picture from the 2022 ELS, when Central Lancashire’s stock of available employment was identified to be 190.78 ha, comprising:

- Chorley: 56.28 ha

- Preston: 82.52 ha – Comprising 71.31 ha in EP1 allocations and another 11.21 ha in ELR sites which were excluded from the 2017 Study, which could provide further growth options (0.66 ha of these ELR sites fall in the City Centre Boundary, as defined in the Local Plan, all fall outside of EP2 Employment Areas)
- South Ribble: 51.98 ha.

5.22 By this measure Chorley would have had sufficient land to meet its needs while South Ribble would have had a modest shortfall of some 5 ha (although this supply figure assumed that none of the Cuerden Strategic Site (Lancashire Central) was counted as local supply for South Ribble. Clearly adding it in would more than meet needs). Preston would also have had some shortfall if only its EP1 allocations were counted. However, it is acknowledged that these supply figures are now over two years old and some of this stock of land has since been taken up. However, SHELAA/Call for Sites exercises have put forward ample potential further employment land to meet the identified OANs.

### ***OAN Model 3: Labour Supply***

5.23 As part of the CLLP development process, consultants supporting the three Councils have identified an ‘Employment-led’ population growth scenario for Central Lancashire. There are two variations of this, one using a fixed 2011 Census commuting ratio (Employment-led) and the second using an adjusted 2011 Census ratio (Employment-led (CR 1-to-1)). In the CR 1-to-1 scenario, the 2011 commuting ratio has been adjusted in each year of the forecast so that future jobs growth is provided for under a 1:1 commuting ratio. These scenarios will inform assessments of housing need in the CLLP. These can be converted into a forecast of land needs, using a methodology comparable to that for Model 2. The results are shown in Tables 51-53, with and without an allowance for homeworking in office based sectors.

**Table 51– Chorley OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	6.0	4.6
Industrial Land Need	2.9	2.3
Warehouse Land Need	2.9	2.2
<b>Total Land Need</b>	<b>11.8</b>	<b>9.1</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	4.5	4.6
Industrial Land Need	2.9	2.3
Warehouse Land Need	2.9	2.2
<b>Total Land Need</b>	<b>10.3</b>	<b>9.1</b>

Source: BE Group, 2024

**Table 52 – Preston OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	3.4	4.6
Industrial Land Need	1.1	1.5
Warehouse Land Need	1.4	1.8
<b>Total Land Need</b>	<b>5.9</b>	<b>7.9</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	2.7	3.6
Industrial Land Need	1.1	1.5
Warehouse Land Need	1.4	1.8
<b>Total Land Need</b>	<b>5.2</b>	<b>6.9</b>

Source: BE Group, 2024

**Table 53 – South Ribble OAN Projections – Labour Supply Models, Hectares**

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Gross of Homeworking</b>		
Office (inc. Research and Development) Land Need	4.5	4.0
Industrial Land Need	4.7	4.1
Warehouse Land Need	3.9	3.4

Use	Employment-led	Employment-led (CR 1-to-1)
<b>Total Land Need</b>	<b>13.1</b>	<b>11.5</b>
<b>Net of Homeworking</b>		
Office (inc. Research and Development) Land Need	3.4	3.0
Industrial Land Need	4.7	4.1
Warehouse Land Need	3.9	3.4
<b>Total Land Need</b>	<b>12.0</b>	<b>10.5</b>

Source: BE Group, 2024

5.24 It is important to note that these represent the employment land requirement specifically from the projected extra working population the sub region will gain to 2041 and, unlike Models 1-2, are not a forecast of OAN for the whole Central Lancashire economy.

5.25 However, what Model 3 does illustrate is that, to accommodate projected population and jobs growth, and ensure the maximum number of those workers possible are able to live and work in the two local authority areas, Chorley needs to provide 9-12 ha, Preston 5-8 ha and South Ribble 11-13 ha. The Preferred OANs set out above allow enough employment land to accommodate the Model 3 requirements, while still providing some surplus of further land need to allow for other growth in the Central Lancashire economy, not linked to population change.

### Future Employment Land Supply Review

5.26 This Study has reviewed some 27 sites which have been identified for employment and mixed uses in Call for Sites/SHELAA and, as of summer 2023, could be taken forward in the CLLP to meet the identified OAN of each Local Authority. These comprise:

- *Chorley* – Chorley is considering 11 sites totalling 62.51 ha, of which 34.09 ha is specifically proposed for employment uses
- *Preston* – Preston has 11 possible sites specifically for employment uses, totalling 92.12 ha of This includes 18.10 ha across seven sites which are in existing employment use, including four sites which were previously allocated, in their entirety under Policy EP1 – ‘Employment Site Allocations’ of the Adopted Preston Local Plan 2012-26: Site Allocations and Development Management Policies Document (2015). One local mixed-use site of 63.3 has was also put

forward, which could also accommodate employment use Class types B2, B8 and E(g)

- *South Ribble* – South Ribble is proposing three local sites specifically for employment uses, totalling 23.14 ha alongside the strategic Samlesbury Enterprise Zone with a gross size of 142.96 ha. Also, the mix use Moss Side Test Track (44.8 ha gross) and the Cuerden Strategic Site, another 66 ha.

5.27 All the sites were reviewed in terms of both their qualitative attractiveness to the market and their likely deliverability, including consideration of some of the practical barriers they may face to development. Additionally, each site was graded using a standard scoring system that consisted of ten objective measures, which further illustrate the site's market desirability and deliverability. The maximum score possible was 100, with the ten individual measures each scored out of ten.

5.28 Two scores were provided, a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic and key local highway proximity, prominence environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are easier to improve and hence provide the ability to raise the quality of a site. The scoring system and the detailed scores are provided in Appendix 3 and 4.

5.29 Tables 54-57 shows the outcome of this analysis. The sites are ordered by their quantitative scoring which provides a guide as to what could be prioritised for allocation, to meet the identified OAN. It should be noted that this analysis considers the suitability of sites for E(g), B2, B8 uses only, sites not identified as suitable for such employment uses could still be suitable for other uses.

5.30 By local authority the key trends are:

- *Chorley* – Preferred sites are focused around Junction 8, M61, Botany Bay and Buckshaw Village, a strategic location and a focus for demand and growth. Accordingly, most score well in quantitative and qualitative terms. There are questions around the deliverability of some more distant locations, in Cowling Brow and Eccleston although none appear completely undeliverable. Lancashire and would compete with locations such as Cuerden.

- *Preston* – The best scoring sites include Preston East Junction 31A M6, reflecting its position on the M6 Corridor, lack of constraints and good development prospects.
- *South Ribble* – There appear to be no market or deliverability issues with any of the strategic or local sites put forward.

**Table 54 – Sites Analysis – Chorley Preferred Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
CH/EP1.6 (19C244x and 19C162)	Botany Bay, Chorley	8.82	Site actively under development.	92	47	<b>Yes</b> (Site under development)
CH/EP1.1 (19C265x)	Southern Commercial, Buckshaw Village	2.04	One office successfully developed here. However, difficulties in letting the completed building suggest that the delivery of further offices here remains a longer term prospect. However, an unconstrained site remains, in the core Buckshaw Village market area, which could support a range of employment uses.	74	28	<b>Yes</b>
CH/EP1.7 (19C245x and 19C163)	Land East of M61	6.92	Deliverability is evidenced by development on site CH/EP1.6: Botany Bay, Chorley, which is under common ownership with this site and controlled by an established developer. The market continues to support at least the smaller units here and CH/EP1.7 could form a later phase of Botany Bay Business Park.	70	46	<b>Yes</b> (Assuming a successful development on CH/EP1.6 a medium term development likely here)
CH/HS1.17 (19C415 and 19C161)	Botany Bay/Great Knowley, Blackburn Road	12.14 total (6.70 employment)	At the time of writing consent was being sought for 29,971 sqm of E(g), B2, B8 space on 6.30 ha. Even if the current planning application is not consented, interest has been demonstrated by an established developer who is actively delivering commercial premises on an adjacent site. There are constraints to overcome, and particularly agreement needs to be reached on a viable site access. However, developers appear to accept that this half of the wider Great Knowley site is deliverable for commercial uses.	70	43	<b>Yes</b>
CH/EP1.2 (19C267x)	The Revolution, Buckshaw Village	2.88	At the time of writing retrospective consent was being sought for B8 use of the site. Sizable, unconstrained development plot in Buckshaw Village which has been consistently identified by stakeholders as a focus for market interest for industrial and warehouse uses of all sizes in Central Lancashire. Land appears to have been held for the expansion of the adjoining use but	65	31	<b>Yes</b>

			remains available for a separate development subject to owner interest.			
CH/HS1.15, CH/EP1.5 (19C242x and 19C160)	Woodlands Centre, Southport Road, Chorley	5.16 total (1.55 for employment)	The site is expected to become available for redevelopment in the short term. Demand here, as elsewhere, likely to favour industrial development here over offices. The barriers to development are thus likely to be integrating such uses with housing (which could cross fund the employment development) and integrating the protected trees into any scheme	62	30	<b>Yes</b>
CH/HS1.20, CH/EP1.8 (19C250x and 19C188)	Bengal Street Depot, Chorley	0.70 total (0.35 for employment)	Assuming an uncontaminated plot with appropriate access onto the A6 can be secured a small industrial scheme would be deliverable here, reflecting other successful developments on similar plots, such as the Vyking Enterprise Hub.	61	34	<b>Yes</b>
CH/EP1.9 (19C050)	Land at Euxton Park Golf Centre, Euxton Lane, Chorley	0.69	There is an established interest in the land from the landowner for development for its own purposes. However, the interest would be for the whole Golf Centre site, including previously undeveloped Green Belt land, to support a large warehouse and office scheme. Only the previously developed part of the site is being considered, which is a narrow, linear plot and would be too small to accommodate this use and likely of negligible interest to local developers who would be seeking a larger and more regularly shaped development site, comparable to the plots at Strawberry Meadows.	55	28	<b>Maybe</b> (Dependant on what land is ultimately allocated here)
CH/HS1.10, CH/EP1.3 (19C100 and 19C119)	Land at Bagganley Lane, Chorley	13.32 total (2.65 employment)	Site is likely to become more of interest to commercial developers once sites closer to Junction 8, M61 are developed out. Assuming an interested developer can be found for the commercial part of the scheme, the main barrier to delivery is likely to be access. It is assumed the commercial element would fall in the west of the site, as close to Blackburn Brow as possible to minimise the traffic impacts on the more residential streets of Knowley Brow/Heapey Road.	49	31	<b>Yes</b>
CH/HS1.13, CH/EP1.4 (19C239x, 19C093 and 19C165)	Cowling Farm, Chorley	9.50 total (0.30 employment)	Largely unconstrained land, with access available via Moorland Gate. The main barrier to delivery is likely to be the site's relative isolation compared to other opportunity plots and the modest size of the employment plot proposed. Absent a requirement from a business for the land or an immediate developer interest, delivery will likely require leadership and co-ordination by landowner Chorley Council.	47	21	<b>Maybe</b> (Will require public sector support and co-ordination to realise)
CH/HS1.37, CH/EP1.11 (19C411)	Land south west of The Green and Langton Brow, Eccleston	2.38 total (1.19 employment)	Site does have some constraints, including how Grove Mill, which covers a large portion of the site, would be treated in any scheme and potential issues of flood risk. However, the site is under developer control and any employment uses put forward here would be building on an established employment location, albeit one in a peripheral location in the	36	18	<b>Maybe</b> (Assuming site constraints can be addressed)

			Borough, which may be subject to a complete redevelopment/replacement of existing uses.			
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Source: BE Group, 2023

**Table 55 – Sites Analysis – Preston Preferred Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
(19P329)	Land and Buildings at St Marys Street, Preston	0.87	Site scoring reflects the central location of the properties. Site comprises the former Museum of Lancashire buildings and the Lancashire Conservation Studios in former Church buildings. All owned by LCC. The Museum buildings are in use for storage at this time. LCC officers report interest from the Ministry of Justice for the use of these buildings for a range of uses. The Lancashire Conservation Studios remain in use by LCC for historic preservation work. It appears the site will remain in public sector use.	69	40	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P286)	St Marys and St Marks, St Mary Street, Preston	1.75	Site scoring reflects the central location of the properties. Site comprises the former Museum of Lancashire buildings the HMRC buildings of St Marks/St Mary's House and a row of occupied shops on the A59 frontage. At the time of writing, it appears likely that the former Museum of Lancashire buildings will remain in public use. St Mark's House and St Mary's House, was due to close in 2025. In April 2023 it was announced that more than 1,000 HMRC jobs will remain in Preston for the long term. HMRC has yet to determine whether St Mark's House and St Mary's House will be retained or if a new base will be established elsewhere in the city. A59 shops are in full use.	68	41	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P141)	Preston East Junction 31A M6	25.31	A developer partner, Trebor Developments (in a Joint Venture with Hillwood developments), has been secured. The site, known as Gateway Park, is now on the market for 3-4 B2/B8 units of 3,065 sqm to 74,322 sqm. Subject to planning, it is intended that units will be available for occupation by 2025.	64	43	<b>Yes</b>

			<p>This site is now under the control of an experienced developer with capacity to deliver space in the short term, subject to planning.</p> <p>Although stakeholders report a weakening market for larger units, demand still exists, particularly at the regional and national level. The almost immediate M6 access from Junction 31(a), although southbound only, would make the site attractive to large occupiers.</p>			
(19P135)	Red Scar Industrial Estate / Red Scar, Whittingham Lane, Broughton	12.02	<p>Land in an established industrial estate. A range of smaller uses have been successfully delivered in Red Scar, most recently Unit B23 Red Scar Industrial Estate.</p> <p>Funding and development partners are understood to be in place for the Longridge Road Energy Centre, the development of which will further open up this site.</p> <p>The remaining land will surround the energy from waste facility. This facility will make the location less attractive to some occupiers, but experience elsewhere suggests there remain plenty of industrial and warehouse occupiers who will be located close to such a facility. Indeed, the Longridge Road Energy Centre may attract supply chain businesses, for this sector to Red Scar.</p>	61	30	<p><b>No</b></p> <p>Land is in an existing Employment Area so already in employment use</p>
(19P136)	Millennium City Park, 4A Barnield Way, Broughton	0.49 (reflecting planning application)	<p>Subject to multiple schemes for mostly industrial land which, if delivered would take up all developable land here.</p>	58	21	<p><b>No</b></p> <p>Land is in an existing Employment Area so already in employment use</p>
(19P012 and 19P198)	Alstoms, Strand Road	6.35	<p>Site already accommodates several high value B2/B8 tenants, and any future scheme should look to build on this existing critical mass. The site falls into the Riversway/Docks area, which has been consistently identified by stakeholders, across multiple studies, as a focus for market interest for industrial, and when required, office uses.</p> <p>Any scheme would need to consider any historic premises which would need to be protected, the desirability of retaining existing high value tenants and allowing for the leases on the site. The site is owned by the City Council which would allow the Council to lead on and support any scheme.</p>	57	31	<p><b>Yes</b></p>
(19P142)	11 Roman Road Farm	24.94	<p>The site now has Outline consent (App. No. 06/2022/0745) for 76,445 sqm of floorspace, of which 71,721sqm is for B2/B8 use and 4,724 sqm is for first floor offices.</p> <p>Reserved Matters consent (App. No. 06/2023/0844) is being sought at plots 6</p>	55	29	<p><b>Yes</b></p>

			<p>and 8 within outline site for a 13,686 sqm warehouse, for an agreed occupier. Although a backland site, the land links to the core market area of North East Preston.</p> <p>The consented scheme is now on the market as APTUS for 11 units of 2,404 sqm to 13,686 sqm each, with consent now being sought to deliver the largest unit (Unit 8) for a defined occupier.</p> <p>Proposals are thus being progressed by a team of experienced developers – Henry Boot Barnfield – with the resources and experience to deliver the proposed development in the short term.</p>			
(19P194)	Oak Street, City Centre, PR1 3XD	0.14	<p>Small infill site comprising an unsurfaced car park and some adjoining older buildings, close to the City Centre. Given the industrial character of the area the most likely be a light industrial scheme. As noted, demand for such premises is strong across Central Lancashire.</p> <p>Development of the vacant land would be comparatively straightforward. Including the adjoining properties, which appear occupied and under approx. two ownerships would be more difficult to deliver and may generate viability constraints.</p>	55	25	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P314)	22 to 24 Manchester Road, Preston	0.08	<p>Small site which appears in active use as a footsore, it is not clear if the site is available. If it is available for redevelopment, given the industrial character of the area the most likely be a light industrial scheme which is subject to good demand.</p> <p>The viability of a redevelopment on such a small site would need to be tested against a proposed scheme, but assuming a viable scheme can be secured redevelopment could be progressed.</p>	53	24	<b>No</b> Land is in an existing Employment Area so already in employment use
(19P133)	Red Scar Site H / Red Scar, Whittingham Lane, Broughton	2.75	<p>Although a backland site, the land falls within an established employment area within North East Preston, regularly identified by stakeholders as the focus for industrial and warehouse market interest in Preston.</p> <p>Across Red Scar Industrial Estate, land is now on the market as some 16 design and build plots of 0.4-1.6 ha, capable of producing premises of 2,787 to 11,613 sqm for leasehold, long leasehold (125 years) or freehold basis.</p> <p>Constraints will limit the net developable area, but across Red Scar there remains a sizable area of flat, unconstrained land which is available for development reflecting the successful development of other sites in North East Preston, including the Preston East Scheme.</p>	48	23	<b>No</b> Land is in an existing Employment Area so already in employment use

(19P178)	Riversway Phase B Site Specific Policy, Maritime Way	17.13	<p>Site forms a logical extension to the Preston Riversway/Preston Docks Employment Area with a common access at the Nelson Way/Chain Caul Way junction and the Riversway Motor Park adjacent. The Riversway/Docks area has been consistently identified by stakeholders, across multiple studies, as a focus for market interest for industrial, and when required, office uses.</p> <p>Site has multiple constraints including Flood Risk, watercourses crossing the site and pylons crossing the west of the site.</p> <p>The site is constrained but the development of adjacent land suggests such constraints can be overcome, particularly if a mixed-use scheme is put forward, which higher value options cross funding commercial uses. Opportunities to expand the successful motor Park could also be explored to deliver higher value uses which might fund appropriate mitigation. The land is owned by the City Council, allowing the Council to lead on and push forward any scheme.</p>	48	29	Yes
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Source: BE Group, 2023

**Table 56 – Sites Analysis – Preston Mixed-Use Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
(19P031)	Land West of Cottam and East of Preston Western Distributor.	63.3	<p>Given the scale and location of this site, it is assumed any scheme put forward would be housing led. Thus, the site should first be assessed against residential needs and requirement. It is also unclear if a full half of the site would realistically be brought forward for commercial uses in this mostly residential location, or be held for other options, such as open space.</p> <p>Assuming a large site for E(g)/B-Class Uses the most likely development would be for a strategic scale B2/B8 scheme. There remains reasonable market interest for such uses in Central Lancashire. The site enjoys a relatively prominent position on the new Western Distributor Road which an access point at the Avice Pimblett Way junction. However, developers and logistics businesses would likely prefer a location closer to the M55 Junction and</p>	56	43	<p><b>Maybe</b></p> <p>(Although the land sits in a relatively strong location, there are a range of practical issues which would need to be addressed before an employment allocation could be considered)</p>

			<p>more distant from housing development.</p> <p>Key for deliverability would be to agree the position of the employment site in relation to housing, and its accessibility to Edith Rigby Way and the M55. A clear plan would also need to be agreed between the landowners and developers as to how, and under whose responsibility, it would be to progress the employment element of the project.</p>			
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Source: BE Group, 2023

**Table 57 – Sites Analysis – South Ribble Preferred Sites**

Site Ref	Site	Site Size (Some sizes amended, reflecting site conditions)	Deliverability Comments	Total Scoring	Market Led Scoring	Overall Recommendation – Consider for Allocation (Yes/No/Maybe)
SR/EP1.7 (SRBC001)	Samlesbury Enterprise Zone	35 (net developable area within South Ribble. From which completed properties will need to be deducted)	Deliverability is evidenced by the range of facilities developed to date and the infrastructure provided. Further growth will be supported by major national government investment National Cyber Force Campus.	76	38	Yes
SR/EP1.2, SR/HS1.1 (19S052)	Cuerden Strategic Site	31.93 (Identified net plot size of the four main commercial development plots in the planning application (16 ha) plus 15.93 ha of further development land) Full application site is 51.3 ha)	<p>Several schemes have been proposed here and ultimately not progressed due to a range of factors. There is a stronger commitment to taking things forward now however, with plans backed by an established developer partner and land under public sector control. Proposals, which have Outline consent, are now focused on B2/B8 premises which better reflects market demand and is attracting interest from national/regional and local businesses. Viability testing, submitted for the application and completed by CBRE in July 2022 ('Financial Viability Statement, Page 7) also indicates that the scheme is viable.</p> <p>Development is expected to come forward in phases to avoid oversupplying the market at any one time.</p>	74	30	Yes
SR/EP1.4, SR/HS1.8 (19S166) Previous Local Plan Site C2	Moss Side Test Track, Leyland (Titan Business Park)	5.7 (Area consented for commercial use)	Development is consented and under developer control. The scheme has been marketed off-plan and is attracting interest. The site has been fully remediated, and construction is set to commence in Autumn 2023 with the first units anticipated to be available in Quarter 1 of 2024.	73	28	Yes

SR/EP1.5 (19S188)	North of Lancashire Business Park, Farington	9.2	Ownership means that it is likely to be held as expansion land for adjacent Leyland Trucks. However, the land is outside of Leyland Trucks' secure site and could be made available to other occupiers. Bridging the River Lostock would be an additional cost to any development, which could generate viability issues. However, the bulk of the site would be developable without crossing the river.	66	38	<b>Yes</b>
SR/EP1.3 (19S119)	Farington Moss, Land at Lodge Lane, Flensburg Way and Penwortham Way, Farington	11.84	The Site comprises unconstrained greenfield land on a main road location. There are no strong barriers to delivery here and a site some 400 metres to the south, Farington Park, has been successfully developed speculatively for larger B2/B8 uses over the last two years, particularly for a 50,539 sqm B8 unit (NW.544) (App. No. 07/2020/00781/OUT).	55	37	<b>Yes</b>
SR/EP1.6 (19S190)	Land Adjacent to Leyland Business Park, Farington	2.1	The land is let to Ainscough Cranes for 14 years from 2010. Currently in use for open storage and the parking of cranes. The land is thus in use at present but remains available for development with no significant constraints. Ultimately delivery would be dependent on the plans of the owner. It would be well placed to support growth within an established Business Park, when needed.	54	17	<b>Yes</b>

Source: BE Group, 2023

## Appendix 1

### List of Consultees

## **Appendix 1 – List of Consultees**

Harworth Estates	Pinkus
Jones Lang Lasalle	PWA Planning
Lamb and Swift	Robert Pinkus
Lancashire County Council	Story Homes
Maple Grove (Eric Wright)	Taylor Weaver
Orbit Developments	UCLan

## **Appendix 2**

# **Forecast Working**

## Appendix 2 – Forecast Working

### Model 2: Labour Demand

**Table A2.1 – Chorley Forecast Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	6	5	0	14	4
Mining and quarrying	-1	5	0	14	-1
Manufacturing	-292	100	-292	36	-10,512
Electricity, gas, steam, and air conditioning supply	0	26	0	14	0
Water supply; sewerage, waste management and remediation activities	-1	26	0	14	-4
Construction	331	26	86	14	1,205
Wholesale and retail trade; repair of motor vehicles and motorcycles	309	5	15	70	1,082
Transportation and storage	208	48	100	70	6,989
Accommodation and food service activities	169	-	-	-	-
Information and communication	724	100	724	14	10,136
Financial and insurance activities	-5	100	-5	14	-70
Real estate activities	122	100	122	14	1,708
Professional, scientific, and technical activities	275	100	275	14	3,850
Administrative and support service activities	366	100	366	14	5,124
Public administration and defence; compulsory social security	12	22	3	14	37
Education	329	22	72	14	1,013
Human health and social work activities	1232	22	271	14	3,795
Arts, entertainment, and recreation	34	-	-	-	-
Other service activities	-30	-	-	-	-
<b>Total</b>	<b>3,788</b>		<b>1,737</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>34,942</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>- 10,586</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>24,356</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>6.7</b>
<b>Industrial Land Need</b>					<b>-2.6</b>
<b>Warehouse Land Need</b>					<b>2.0</b>

Source: BE Group, 2024

**Table A2.2 – Chorley Forecast Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	4	5	0	14	3
Mining and quarrying	-1	5	0	14	-1
Manufacturing	-292	100	-292	36	-10,512
Electricity, gas, steam, and air conditioning supply	0	26	0	14	0
Water supply; sewerage, waste management and remediation activities	-1	26	0	14	-4
Construction	235	26	61	14	855
Wholesale and retail trade; repair of motor vehicles and motorcycles	309	5	15	70	1,082
Transportation and storage	208	48	100	70	6,989
Accommodation and food service activities	169	-	-	-	-
Information and communication	514	100	514	14	7,196
Financial and insurance activities	-3	100	-3	14	-42
Real estate activities	86	100	86	14	1,204
Professional, scientific, and technical activities	195	100	195	14	2,730
Administrative and support service activities	260	100	260	14	3,640
Public administration and defence; compulsory social security	8	22	2	14	25
Education	329	22	72	14	1,013
Human health and social work activities	1232	22	271	14	3,795
Arts, entertainment, and recreation	34	-	-	-	-
Other service activities	-30	-	-	-	-
<b>Total</b>	<b>3,258</b>		<b>1,281</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>28,531</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>- 10,558</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>17,973</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>5.1</b>
<b>Industrial Land Need</b>					<b>-2.6</b>
<b>Warehouse Land Need</b>					<b>2.0</b>

Source: BE Group, 2024

**Table A2.3 – Preston Forecast Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	14	5	1	14	10
Mining and quarrying	-14	5	-1	14	-10
Manufacturing	-288	100	-288	36	-10,368
Electricity, gas, steam, and air conditioning supply	-16	26	-4	14	-58
Water supply; sewerage, waste management and remediation activities	-3	26	-1	14	-11
Construction	524	26	136	14	1,907
Wholesale and retail trade; repair of motor vehicles and motorcycles	419	5	21	70	1,467
Transportation and storage	133	48	64	70	4,469
Accommodation and food service activities	420	-	-	-	-
Information and communication	158	100	158	14	2,212
Financial and insurance activities	-21	100	-21	14	-294
Real estate activities	204	100	204	14	2,856
Professional, scientific, and technical activities	428	100	428	14	5,992
Administrative and support service activities	690	100	690	14	9,660
Public administration and defence; compulsory social security	140	22	31	14	431
Education	277	22	61	14	853
Human health and social work activities	410	22	90	14	1,263
Arts, entertainment, and recreation	75	-	-	-	-
Other service activities	-18	-	-	-	-
<b>Total</b>	<b>3,533</b>		<b>1,569</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>31,120</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>- 10,741</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>20,379</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>6.2</b>
<b>Industrial Land Need</b>					<b>-2.6</b>
<b>Warehouse Land Need</b>					<b>1.5</b>

Source: BE Group, 2024

**Table A2.4 – Preston Forecast Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	10	5	1	14	7
Mining and quarrying	-11	5	-1	14	-8
Manufacturing	-288	100	-288	36	-10,368
Electricity, gas, steam, and air conditioning supply	-12	26	-3	14	-44
Water supply; sewerage, waste management and remediation activities	-2	26	-1	14	-7
Construction	393	26	102	14	1,431
Wholesale and retail trade; repair of motor vehicles and motorcycles	419	5	21	70	1,467
Transportation and storage	133	48	64	70	4,469
Accommodation and food service activities	420	-	-	-	-
Information and communication	118	100	118	14	1,652
Financial and insurance activities	-16	100	-16	14	-224
Real estate activities	153	100	153	14	2,142
Professional, scientific, and technical activities	322	100	322	14	4,508
Administrative and support service activities	519	100	519	14	7,266
Public administration and defence; compulsory social security	105	22	23	14	323
Education	277	22	61	14	853
Human health and social work activities	410	22	90	14	1,263
Arts, entertainment, and recreation	75	-	-	-	-
Other service activities	-18	-	-	-	-
<b>Total</b>	<b>3,009</b>		<b>1,166</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>25,380</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>- 10,651</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>14,730</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>4.8</b>
<b>Industrial Land Need</b>					<b>-2.6</b>
<b>Warehouse Land Need</b>					<b>1.5</b>

Source: BE Group, 2024

**Table A2.5 – South Ribble Forecast Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	8	5	0	14	6
Mining and quarrying	0	5	0	14	0
Manufacturing	-613	100	-613	36	-22,068
Electricity, gas, steam, and air conditioning supply	-1	26	0	14	-4
Water supply; sewerage, waste management and remediation activities	-10	26	-3	14	-36
Construction	1087	26	283	14	3,957
Wholesale and retail trade; repair of motor vehicles and motorcycles	396	5	20	70	1,386
Transportation and storage	276	48	132	70	9,274
Accommodation and food service activities	85	-	-	-	-
Information and communication	368	100	368	14	5,152
Financial and insurance activities	-6	100	-6	14	-84
Real estate activities	360	100	360	14	5,040
Professional, scientific, and technical activities	262	100	262	14	3,668
Administrative and support service activities	204	100	204	14	2,856
Public administration and defence; compulsory social security	5	22	1	14	15
Education	299	22	66	14	921
Human health and social work activities	971	22	214	14	2,991
Arts, entertainment, and recreation	123	-	-	-	-
Other service activities	-23	-	-	-	-
<b>Total</b>	<b>3,790</b>		<b>1,288</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>35,265</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>- 22,192</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>13,073</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>6.1</b>
<b>Industrial Land Need</b>					<b>-5.5</b>
<b>Warehouse Land Need</b>					<b>2.7</b>

Source: BE Group, 2024

**Table A2.6 – South Ribble Forecast Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	5	5	0	14	4
Mining and quarrying	0	5	0	14	0
Manufacturing	-613	100	-613	36	-22,068
Electricity, gas, steam, and air conditioning supply	-1	26	0	14	-4
Water supply; sewerage, waste management and remediation activities	-7	26	-2	14	-25
Construction	774	26	201	14	2,817
Wholesale and retail trade; repair of motor vehicles and motorcycles	396	5	20	70	1,386
Transportation and storage	276	48	132	70	9,274
Accommodation and food service activities	85	-	-	-	-
Information and communication	262	100	262	14	3,668
Financial and insurance activities	-4	100	-4	14	-56
Real estate activities	256	100	256	14	3,584
Professional, scientific, and technical activities	186	100	186	14	2,604
Administrative and support service activities	145	100	145	14	2,030
Public administration and defence; compulsory social security	3	22	1	14	9
Education	299	22	66	14	921
Human health and social work activities	971	22	214	14	2,991
Arts, entertainment, and recreation	123	-	-	-	-
Other service activities	-23	-	-	-	-
<b>Total</b>	<b>3,135</b>		<b>864</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>29,287</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>- 22,153</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>7,134</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>4.6</b>
<b>Industrial Land Need</b>					<b>-5.5</b>
<b>Warehouse Land Need</b>					<b>2.7</b>

Source: BE Group, 2024

**Model 3: Labour Supply**

**Table A2.7 – Chorley Employment-led Population Growth Scenario Forecast, Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	47	5	2	14	33
Mining and quarrying	0	5	0	14	0
Manufacturing	326	100	326	36	11,736
Electricity, gas, steam, and air conditioning supply	0	26	0	14	0
Water supply; sewerage, waste management and remediation activities	20	26	5	14	73
Construction	512	26	133	14	1,864
Wholesale and retail trade; repair of motor vehicles and motorcycles	592	5	30	70	2,072
Transportation and storage	281	48	135	70	9,442
Accommodation and food service activities	179	-	-	-	-
Information and communication	370	100	370	14	5,180
Financial and insurance activities	69	100	69	14	966
Real estate activities	73	100	73	14	1,022
Professional, scientific, and technical activities	394	100	394	14	5,516
Administrative and support service activities	333	100	333	14	4,662
Public administration and defence; compulsory social security	299	22	66	14	921
Education	344	22	76	14	1,060
Human health and social work activities	856	22	188	14	2,636
Arts, entertainment, and recreation	62	-	-	-	-
Other service activities	104	-	-	-	-
<b>Total</b>	<b>4,862</b>		<b>2,200</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>47,182</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>47,182</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>6.0</b>
<b>Industrial Land Need</b>					<b>2.9</b>
<b>Warehouse Land Need</b>					<b>2.9</b>

Source: BE Group, 2024

**Table A2.8 – Chorley Employment-led Population Growth Scenario Forecast, Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	33	5	2	14	23
Mining and quarrying	0	5	0	14	0
Manufacturing	326	100	326	36	11,736
Electricity, gas, steam, and air conditioning supply	0	26	0	14	0
Water supply; sewerage, waste management and remediation activities	14	26	4	14	51
Construction	364	26	95	14	1,325
Wholesale and retail trade; repair of motor vehicles and motorcycles	592	5	30	70	2,072
Transportation and storage	281	48	135	70	9,442
Accommodation and food service activities	179	-	-	-	-
Information and communication	263	100	263	14	3,682
Financial and insurance activities	49	100	49	14	686
Real estate activities	52	100	52	14	728
Professional, scientific, and technical activities	280	100	280	14	3,920
Administrative and support service activities	236	100	236	14	3,304
Public administration and defence; compulsory social security	212	22	47	14	653
Education	344	22	76	14	1,060
Human health and social work activities	856	22	188	14	2,636
Arts, entertainment, and recreation	62	-	-	-	-
Other service activities	104	-	-	-	-
<b>Total</b>	<b>4,248</b>		<b>1,781</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>41,318</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>41,318</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>4.5</b>
<b>Industrial Land Need</b>					<b>2.9</b>
<b>Warehouse Land Need</b>					<b>2.9</b>

Source: BE Group, 2024

**Table A2.9 – Chorley Employment-led (CR 1-to-1) Population Growth Scenario Forecast, Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	37	5	2	14	26
Mining and quarrying	0	5	0	14	0
Manufacturing	253	100	253	36	9,108
Electricity, gas, steam, and air conditioning supply	0	26	0	14	0
Water supply; sewerage, waste management and remediation activities	16	26	4	14	58
Construction	398	26	103	14	1,449
Wholesale and retail trade; repair of motor vehicles and motorcycles	460	5	23	70	1,610
Transportation and storage	218	48	105	70	7,325
Accommodation and food service activities	139	-	-	-	-
Information and communication	288	100	288	14	4,032
Financial and insurance activities	54	100	54	14	756
Real estate activities	57	100	57	14	798
Professional, scientific, and technical activities	306	100	306	14	4,284
Administrative and support service activities	258	100	258	14	3,612
Public administration and defence; compulsory social security	232	22	51	14	715
Education	267	22	59	14	822
Human health and social work activities	664	22	146	14	2,045
Arts, entertainment, and recreation	48	-	-	-	-
Other service activities	81	-	-	-	-
<b>Total</b>	<b>3,776</b>		<b>1,709</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>36,640</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>36,640</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>4.6</b>
<b>Industrial Land Need</b>					<b>2.3</b>
<b>Warehouse Land Need</b>					<b>2.2</b>

Source: BE Group, 2024

**Table A2.10 – Chorley Employment-led (CR 1-to-1) Population Growth Scenario Forecast, Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	26	5	1	14	18
Mining and quarrying	0	5	0	14	0
Manufacturing	253	100	253	36	9,108
Electricity, gas, steam, and air conditioning supply	0	26	0	14	0
Water supply; sewerage, waste management and remediation activities	11	26	3	14	40
Construction	283	26	74	14	1,030
Wholesale and retail trade; repair of motor vehicles and motorcycles	460	5	23	70	1,610
Transportation and storage	218	48	105	70	7,325
Accommodation and food service activities	139	-	-	-	-
Information and communication	204	100	204	14	2,856
Financial and insurance activities	38	100	38	14	532
Real estate activities	40	100	40	14	560
Professional, scientific, and technical activities	217	100	217	14	3,038
Administrative and support service activities	183	100	183	14	2,562
Public administration and defence; compulsory social security	165	22	36	14	508
Education	267	22	59	14	822
Human health and social work activities	664	22	146	14	2,045
Arts, entertainment, and recreation	48	-	-	-	-
Other service activities	81	-	-	-	-
<b>Total</b>	<b>3,299</b>		<b>1,382</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>32,055</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>32,055</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>3.5</b>
<b>Industrial Land Need</b>					<b>2.3</b>
<b>Warehouse Land Need</b>					<b>2.2</b>

Source: BE Group, 2024

**Table A2.11 – Preston Employment-led Population Growth Scenario Forecast, Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	17	5	1	14	12
Mining and quarrying	0	5	0	14	0
Manufacturing	125	100	125	36	4,500
Electricity, gas, steam, and air conditioning supply	12	26	3	14	44
Water supply; sewerage, waste management and remediation activities	11	26	3	14	40
Construction	200	26	52	14	728
Wholesale and retail trade; repair of motor vehicles and motorcycles	359	5	18	70	1,257
Transportation and storage	124	48	60	70	4,166
Accommodation and food service activities	74	-	-	-	-
Information and communication	77	100	77	14	1,078
Financial and insurance activities	86	100	86	14	1,204
Real estate activities	46	100	46	14	644
Professional, scientific, and technical activities	192	100	192	14	2,688
Administrative and support service activities	293	100	293	14	4,102
Public administration and defence; compulsory social security	406	22	89	14	1,250
Education	188	22	41	14	579
Human health and social work activities	420	22	92	14	1,294
Arts, entertainment, and recreation	33	-	-	-	-
Other service activities	37	-	-	-	-
<b>Total</b>	<b>2,701</b>		<b>1,178</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>23,586</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>23,586</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>3.4</b>
<b>Industrial Land Need</b>					<b>1.1</b>
<b>Warehouse Land Need</b>					<b>1.4</b>

Source: BE Group, 2024

**Table A2.12 – Preston Employment-led Population Growth Scenario Forecast, Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	13	5	1	14	9
Mining and quarrying	0	5	0	14	0
Manufacturing	125	100	125	36	4,500
Electricity, gas, steam, and air conditioning supply	9	26	2	14	33
Water supply; sewerage, waste management and remediation activities	8	26	2	14	29
Construction	150	26	39	14	546
Wholesale and retail trade; repair of motor vehicles and motorcycles	359	5	18	70	1,257
Transportation and storage	124	48	60	70	4,166
Accommodation and food service activities	74	-	-	-	-
Information and communication	57	100	57	14	798
Financial and insurance activities	65	100	65	14	910
Real estate activities	34	100	34	14	476
Professional, scientific, and technical activities	144	100	144	14	2,016
Administrative and support service activities	220	100	220	14	3,080
Public administration and defence; compulsory social security	305	22	67	14	939
Education	188	22	41	14	579
Human health and social work activities	420	22	92	14	1,294
Arts, entertainment, and recreation	33	-	-	-	-
Other service activities	37	-	-	-	-
<b>Total</b>	<b>2,367</b>		<b>967</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>20,632</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>20,632</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>2.7</b>
<b>Industrial Land Need</b>					<b>1.1</b>
<b>Warehouse Land Need</b>					<b>1.4</b>

Source: BE Group, 2024

**Table A2.13 – Preston Employment-led (CR 1-to-1) Population Growth Scenario Forecast, Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	24	5	1	14	17
Mining and quarrying	0	5	0	14	0
Manufacturing	170	100	170	36	6,120
Electricity, gas, steam, and air conditioning supply	16	26	4	14	58
Water supply; sewerage, waste management and remediation activities	15	26	4	14	55
Construction	271	26	70	14	986
Wholesale and retail trade; repair of motor vehicles and motorcycles	487	5	24	70	1,705
Transportation and storage	168	48	81	70	5,645
Accommodation and food service activities	101	-	-	-	-
Information and communication	104	100	104	14	1,456
Financial and insurance activities	117	100	117	14	1,638
Real estate activities	62	100	62	14	868
Professional, scientific, and technical activities	260	100	260	14	3,640
Administrative and support service activities	398	100	398	14	5,572
Public administration and defence; compulsory social security	551	22	121	14	1,697
Education	256	22	56	14	788
Human health and social work activities	570	22	125	14	1,756
Arts, entertainment, and recreation	45	-	-	-	-
Other service activities	50	-	-	-	-
<b>Total</b>	<b>3,664</b>		<b>1,599</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>32,001</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>32,001</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>4.6</b>
<b>Industrial Land Need</b>					<b>1.5</b>
<b>Warehouse Land Need</b>					<b>1.8</b>

Source: BE Group, 2024

**Table A2.14 – Preston Employment-led (CR 1-to-1) Population Growth Scenario Forecast, Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	18	5	1	14	13
Mining and quarrying	0	5	0	14	0
Manufacturing	170	100	170	36	6,120
Electricity, gas, steam, and air conditioning supply	12	26	3	14	44
Water supply; sewerage, waste management and remediation activities	11	26	3	14	40
Construction	204	26	53	14	743
Wholesale and retail trade; repair of motor vehicles and motorcycles	487	5	24	70	1,705
Transportation and storage	168	48	81	70	5,645
Accommodation and food service activities	101	-	-	-	-
Information and communication	78	100	78	14	1,092
Financial and insurance activities	88	100	88	14	1,232
Real estate activities	46	100	46	14	644
Professional, scientific, and technical activities	196	100	196	14	2,744
Administrative and support service activities	299	100	299	14	4,186
Public administration and defence; compulsory social security	414	22	91	14	1,275
Education	256	22	56	14	788
Human health and social work activities	570	22	125	14	1,756
Arts, entertainment, and recreation	45	-	-	-	-
Other service activities	50	-	-	-	-
<b>Total</b>	<b>3,212</b>		<b>1,315</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>28,025</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>28,025</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>3.6</b>
<b>Industrial Land Need</b>					<b>1.5</b>
<b>Warehouse Land Need</b>					<b>1.8</b>

Source: BE Group, 2024

**Table A2.15 – South Ribble Employment-led Population Growth Scenario Forecast, Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	27	5	1	14	19
Mining and quarrying	0	5	0	14	0
Manufacturing	520	100	520	36	18,720
Electricity, gas, steam, and air conditioning supply	6	26	2	14	22
Water supply; sewerage, waste management and remediation activities	51	26	13	14	186
Construction	567	26	147	14	2,064
Wholesale and retail trade; repair of motor vehicles and motorcycles	587	5	29	70	2,055
Transportation and storage	402	48	193	70	13,507
Accommodation and food service activities	110	-	-	-	-
Information and communication	155	100	155	14	2,170
Financial and insurance activities	74	100	74	14	1,036
Real estate activities	125	100	125	14	1,750
Professional, scientific, and technical activities	270	100	270	14	3,780
Administrative and support service activities	306	100	306	14	4,284
Public administration and defence; compulsory social security	106	22	23	14	326
Education	247	22	54	14	761
Human health and social work activities	561	22	123	14	1,728
Arts, entertainment, and recreation	73	-	-	-	-
Other service activities	57	-	-	-	-
<b>Total</b>	<b>4,244</b>		<b>2,037</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>52,407</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>52,407</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>4.5</b>
<b>Industrial Land Need</b>					<b>4.7</b>
<b>Warehouse Land Need</b>					<b>3.9</b>

Source: BE Group, 2024

**Table A2.16 – South Ribble Employment-led Population Growth Scenario Forecast, Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	19	5	1	14	13
Mining and quarrying	0	5	0	14	0
Manufacturing	520	100	520	36	18,720
Electricity, gas, steam, and air conditioning supply	4	26	1	14	15
Water supply; sewerage, waste management and remediation activities	36	26	9	14	131
Construction	404	26	105	14	1,471
Wholesale and retail trade; repair of motor vehicles and motorcycles	587	5	29	70	2,055
Transportation and storage	402	48	193	70	13,507
Accommodation and food service activities	110	-	-	-	-
Information and communication	111	100	111	14	1,554
Financial and insurance activities	53	100	53	14	742
Real estate activities	89	100	89	14	1,246
Professional, scientific, and technical activities	193	100	193	14	2,702
Administrative and support service activities	218	100	218	14	3,052
Public administration and defence; compulsory social security	75	22	17	14	231
Education	247	22	54	14	761
Human health and social work activities	561	22	123	14	1,728
Arts, entertainment, and recreation	73	-	-	-	-
Other service activities	57	-	-	-	-
<b>Total</b>	<b>3,758</b>		<b>1,717</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>47,927</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>47,927</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>3.4</b>
<b>Industrial Land Need</b>					<b>4.7</b>
<b>Warehouse Land Need</b>					<b>3.9</b>

Source: BE Group, 2024

**Table A2.17 – South Ribble Employment-led (CR 1-to-1) Population Growth Scenario Forecast, Gross of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	24	5	1	14	17
Mining and quarrying	0	5	0	14	0
Manufacturing	458	100	458	36	16,488
Electricity, gas, steam, and air conditioning supply	5	26	1	14	18
Water supply; sewerage, waste management and remediation activities	45	26	12	14	164
Construction	499	26	130	14	1,816
Wholesale and retail trade; repair of motor vehicles and motorcycles	516	5	26	70	1,806
Transportation and storage	353	48	169	70	11,861
Accommodation and food service activities	97	-	-	-	-
Information and communication	137	100	137	14	1,918
Financial and insurance activities	65	100	65	14	910
Real estate activities	110	100	110	14	1,540
Professional, scientific, and technical activities	238	100	238	14	3,332
Administrative and support service activities	269	100	269	14	3,766
Public administration and defence; compulsory social security	93	22	20	14	286
Education	217	22	48	14	668
Human health and social work activities	494	22	109	14	1,522
Arts, entertainment, and recreation	64	-	-	-	-
Other service activities	50	-	-	-	-
<b>Total</b>	<b>3,735</b>		<b>1,793</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>46,112</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>46,112</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>4.0</b>
<b>Industrial Land Need</b>					<b>4.1</b>
<b>Warehouse Land Need</b>					<b>3.4</b>

Source: BE Group, 2024

**Table A2.18 – South Ribble Employment-led (CR 1-to-1) Population Growth Scenario Forecast, Net of Homeworking**

SIC Group	Workforce Growth 2023-41	Percentage Occupying E(g)/B2/B8 Space	Growth Number of Jobs on E(g)/B2/B Space	Floorspace Per Job (sqm)	Floorspace Required (sqm)
Agriculture, forestry, and fishing	17	5	1	14	12
Mining and quarrying	0	5	0	14	0
Manufacturing	458	100	458	36	16,488
Electricity, gas, steam, and air conditioning supply	4	26	1	14	15
Water supply; sewerage, waste management and remediation activities	32	26	8	14	116
Construction	355	26	92	14	1,292
Wholesale and retail trade; repair of motor vehicles and motorcycles	516	5	26	70	1,806
Transportation and storage	353	48	169	70	11,861
Accommodation and food service activities	97	-	-	-	-
Information and communication	97	100	97	14	1,358
Financial and insurance activities	46	100	46	14	644
Real estate activities	78	100	78	14	1,092
Professional, scientific, and technical activities	169	100	169	14	2,366
Administrative and support service activities	192	100	192	14	2,688
Public administration and defence; compulsory social security	66	22	15	14	203
Education	217	22	48	14	668
Human health and social work activities	494	22	109	14	1,522
Arts, entertainment, and recreation	64	-	-	-	-
Other service activities	50	-	-	-	-
<b>Total</b>	<b>3,307</b>		<b>1,509</b>		
<b>Increase in Floorspace – Growth Sectors (sqm)</b>					<b>42,131</b>
<b>Decline in Floorspace – Declining Sectors (sqm)</b>					<b>-</b>
<b>Net Change in Floorspace Demand (sqm)</b>					<b>42,131</b>
<b>Office (inc. Research and Development) Land Need</b>					<b>3.0</b>
<b>Industrial Land Need</b>					<b>4.1</b>
<b>Warehouse Land Need</b>					<b>3.4</b>

Source: BE Group, 2024

## **Appendix 3**

# **Sites Scoring System**

### Appendix 3 – Site Scoring System

Site and Access	Proximity to strategic highway network	<ul style="list-style-type: none"> <li>• Site adjacent to primary route (motorway, strategic highways network route) - M6, M61, M65, M55, A6 junction – score 10</li> <li>• Site 0.5 km from primary route – score 9</li> <li>• Site 1.0 km from primary route – score 8</li> <li>• For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary route scores zero.</li> </ul>
	Proximity to key local routes	<p>Proximity to key county routes (A49, A59, A583, A582 and A6):</p> <ul style="list-style-type: none"> <li>• Site within 1.0 km from A49, A59, A583, A582, A6 junction – score 10</li> <li>• Site within 5.0 km from A49, A59, A583, A582, A6 junction – score 6</li> <li>• Site within 10.0 km from A49, A59, A583, A582, A6 junction – score 3</li> <li>• Site more than 10.0 km from A49, A59, A583, A582, A6 junction – score 0.</li> </ul>
	Prominence	<ul style="list-style-type: none"> <li>• Site adjacent to, and visible from M6, M61, M65, M55, A6 – score 10/9</li> <li>• Site adjacent to, and visible from other dual carriageway – score 8/7</li> <li>• Site adjacent to, and visible from other A road – score 6/5</li> <li>• Site has local prominence, e.g. within its industrial location – score 4/3</li> <li>• Site located in ‘backlands’ – score 2/1/0.</li> </ul>
	Public Transport	<ul style="list-style-type: none"> <li>• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10</li> <li>• Site within 0.5 km of a bus route – score 5</li> <li>• Limited public transport – score 0.</li> </ul>
Planning Status		<ul style="list-style-type: none"> <li>• If site has detailed/full planning status – score 10</li> <li>• If site has outline planning status – score 8</li> <li>• If site allocated in the development plan – score 4</li> <li>• If site is available, subject to planning – score 1.</li> </ul>
Site Conditions	Services Availability	<ul style="list-style-type: none"> <li>• If all services are provided and in place – score 10</li> <li>• If priority services are available with no abnormal costs – score 7</li> <li>• If all priority services are available, but with abnormal costs – score 3</li> <li>• Some services are unavailable – score 0.</li> </ul>
	Constraints	<p>May be physical (including access), planning, or legal</p> <p>Reduce score by 2 for each constraint</p> <p>If there are none – score 10.</p>
	Environmental Setting	<p>Subjective, score 0 to 10, examples:</p> <ul style="list-style-type: none"> <li>• Good quality business park/greenfield location – score 10</li> <li>• Moderate quality industrial estate – score 5</li> <li>• Poor quality industrial estate/in-fill location – score 2.</li> </ul>
	Flexibility	<p>Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers</p> <p>Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.</p>
Site Availability		<ul style="list-style-type: none"> <li>• Site available to develop within 0-1 year – score 10</li> <li>• Site available to develop within 1-5 years – score 6</li> <li>• Site available to develop 6-10 years – score 3</li> <li>• Site available to develop 10+ years – score 0.</li> </ul>

Source: BE Group, 2023

## **Appendix 4**

# **Sites Scoring Results**

### Appendix A4.1 – Sites Scoring – Chorley Preferred Sites

Site Ref.	Site Name*	Revised Size (ha)	Site Location and Access				Planning Status	Site Conditions				Site availability	Total	Market-led Sub-total	Constraints	
			Road Proximity - Strategic Highway	Road Proximity - Local	Prominence	Public Transport		Services Availability	Constraints	Environmental Setting	Flexibility					
<b>CHORLEY - PREFERRED SITES</b>																
CHEP1.6 (19C244x and 19C162)	Botany Bay, Chorley	8.82	10	10	10	5	10	10	10	10	9	8	10	92	47	None
CHEP1.1 (19C265x)	Southern Commercial, Buckshaw Village	2.04	6	6	3	10	10	10	10	10	9	4	6	74	28	None
CHEP1.7 (19C245x and 19C163)	Land East of M61	6.92	10	10	10	5	4	7	2	9	7	6	70	46	<ul style="list-style-type: none"> <li>*The site is within an area forming part of the source of the River Chor.</li> <li>*Part of the site is within an ecological network – grassland identified by Lancashire County Council.</li> <li>*The site is crossed north to south by Footpath No 26</li> <li>*Very little drainage infrastructure and no water infrastructure available in this area.</li> </ul>	
CHHS1.17 (19C415 and 19C161)	Botany Bay/Great Knowley, Blackburn Road	12.14 total (6.70 employment)	9	10	8	10	4	7	0	9	7	6	70	43	<ul style="list-style-type: none"> <li>*Topography of the site, the Leeds and Liverpool Canal and the slope up to Knowley Brow.</li> <li>*A Tree Preservation Order (No 8 (Chorley) 2006 and Definitive Footpath No 26 cross the site.</li> <li>*The sites are identified as being within multiple National Character Areas</li> <li>*Impacts to multiple ecological habitats</li> <li>*Potential need to provide a bridge across the Canal is a barrier to financial viability</li> <li>*Possible junction investment around J8, M61 required</li> </ul>	
CHEP1.2 (19C267x)	The Revolution, Buckshaw Village	2.88	8	6	4	10	4	7	10	8	5	3	65	31	None	
CHHS1.15, CHEP1.5 (19C242x and 19C160)	Woodlands Centre, Southport Road, Chorley	5.16 total (1.55 for employment)	7	6	4	10	4	10	2	9	4	6	62	30	<ul style="list-style-type: none"> <li>*Within the site there is a Tree Preservation Order (TPO6 (23 April 1992)) which comprises 13 individual trees, further woodland extends beyond the site.</li> <li>*Existing buildings to be cleared</li> <li>*Land adjacent and to the east and south of the allocation is included within a Biological Heritage Site (Walleys Wood, Copper Works Wood and Big Wood) which forms woodland and scrubland (Policy BNE9)</li> <li>*Within an ecological network/ woodland network</li> <li>*Site at risk from reservoir and sewer flooding.</li> </ul>	
CHHS1.20, CHEP1.8 (19C250x and 19C188)	Bengal Street Depot, Chorley	0.70 total (0.35 for employment)	10	10	10	10	1	10	0	2	2	6	61	34	<ul style="list-style-type: none"> <li>*Buildings on site</li> <li>*Possible contamination from the previous use</li> <li>*Housing adjacent</li> <li>*Access is onto a dual carriageway close to a roundabout</li> <li>*Site at risk from reservoir flooding.</li> </ul>	
CHEP1.9 (19C050)	Land at Euxton Park Golf Centre, Euxton Lane, Chorley	0.69	7	6	4	10	1	10	0	8	3	6	55	28	<ul style="list-style-type: none"> <li>*Trees onsite</li> <li>*Site subject to an existing lease</li> <li>*Buildings onsite</li> <li>*Narrow linear plot</li> <li>*Site has access to Euxton Lane. Access north to Buckshaw Village would require use of the existing bridge across the railway. Refurbishing this bridge would be a sizable extra cost to any project and could impact on viability</li> </ul>	
CHHS1.10, CHEP1.3 (19C100 and 19C119)	Land at Bagganley Lane, Chorley	13.32 total (2.65 employment)	6	10	3	10	1	7	0	7	5	0	49	31	<ul style="list-style-type: none"> <li>*Trees on site</li> <li>*Public footpath crosses west of site (Bagganley Lane)</li> <li>*Black Brook runs to the south of the site although the plot mostly falls outside areas of identified flood risk</li> <li>*Within an ecological network/ wildlife corridor</li> <li>*Access would need to be agreed as existing roads, including Knowley Brow/Hespey Road and Bagganley Lane</li> <li>*Hespey Road frontage includes some land used as residential gardens</li> </ul>	
CHHS1.13, CHEP1.4 (19C230x, 19C093 and 19C165)	Cowling Farm, Chorley	9.50 total (0.30 employment)	2	10	2	10	4	7	2	5	2	3	47	21	<ul style="list-style-type: none"> <li>*The site is large, fairly regular in shape but undulating and would require some re-contouring.</li> <li>*Housing adjacent</li> <li>*Within an ecological network/ woodland network</li> <li>*Footpaths No 4 and No 5 cross the site and there is a related footbridge across the M61.</li> </ul>	
CHHS1.37, CHEP1.11 (19C411)	Land south west of The Green and Langton Brow, Eccleston	2.38 total (1.19 employment)	0	6	3	5	1	10	2	6	3	0	36	18	<ul style="list-style-type: none"> <li>*Site developed and in full use at this time</li> <li>*Site includes the historic Grove Mill which it is assumed will need to be protected</li> <li>*Syril Brook to the south west. Most of the west of the site falls into Flood Zones 2 and 3</li> <li>*Site slopes to the south west</li> </ul>	

Source: BE Group, 2024

**Appendix A4.2 – Sites Scoring – Preston Preferred/Mixed Sites**

Site Ref.	Site Name*	Revised Size (ha)	Site Location and Access				Planning Status	Site Conditions				Site availability	Total	Market-led Sub-total	Constraints
			Road Proximity - Strategic Highway	Road Proximity - Local	Prominence	Public Transport		Services Availability	Constraints	Environmental Setting	Flexibility				
<b>PRESTON - PREFERRED SITES</b>															
19P141	Preston East Junction 31A M6	25.31	10	6	9	5	4	7	2	8	10	3	64	43	<ul style="list-style-type: none"> <li>Existing ponds on site</li> <li>Trees and hedgerows on site</li> <li>An overhead electric cable runs diagonally across the site.</li> <li>Site entirely within a low-level flood risk zone.</li> <li>Substantial landscape buffers will be required as part of any development proposals.</li> </ul>
19P012 and 19P186	Alstons, Strand Road	3.18	7	10	7	10	1	10	2	5	2	3	57	31	<ul style="list-style-type: none"> <li>Site includes historic industrial buildings which may need to be retained in any scheme</li> <li>Site subject to several ongoing property leases of 10-15 years, also several historic 999 year leases associated with electrical infrastructure</li> <li>Gas distribution pipes and buffer run down the southwestern boundary of the site. It is within the HSE Risk Zone for hazardous installators/ pipes</li> <li>Site has a record of sewer flooding</li> </ul>
19P142	11 Roman Road Farm	24.94	7	3	2	5	4	7	4	7	10	6	55	29	<ul style="list-style-type: none"> <li>Course of an old roman road runs through the northern section of the site</li> <li>Potential habitat for bats and birds within the site</li> <li>Trees and hedgerows on site</li> <li>The site borders onto the Red Scar and Tun Brook Woods Site of Special Scientific Interest (SSSI) and the Tun Brook.</li> </ul>
19P178	Riversway Phase B Site Specific Policy, Maritime Way	8.65	0	10	4	5	1	7	0	8	7	6	48	29	<ul style="list-style-type: none"> <li>Trees on site</li> <li>Watercourses cross the site</li> <li>Pylons cross the west of the site</li> <li>Lancashire Woodland Ecological Network runs through northern part of the site.</li> <li>Ecology consultation zone runs within eastern edge and southern edge of site</li> <li>Gas distribution pipes and Transpennine Express distribution pipes with buffer run across the middle of the site from roughly west to northeast. Other transmission pipes with buffer are located within the western edge of the site</li> </ul>
<b>PRESTON - MIXED USE SITES</b>															
19P031	Land West of Cottam and East of Preston Western Distributor.	83.3	7	10	8	5	1	7	0	8	10	0	56	43	<ul style="list-style-type: none"> <li>Railway and Lancaster Canal Cross the site. Small strip of biological heritage site follows the canal through the site</li> <li>Active golf club (Ashton and Lea) in the south</li> <li>Pylons cross the site</li> <li>Watercourses and ponds on the site</li> <li>Farms on site</li> <li>Housing adjacent</li> <li>Land in multiple ownership</li> </ul>

Source: BE Group, 2024

**Appendix A4.3 – Sites Scoring – South Ribble Preferred Sites**

Site Ref.	Site Name*	Revised Size (ha)	Site Location and Access				Planning Status	Site Conditions				Site availability	Total	Market-led Sub-total	Constraints
			Road Proximity - Strategic Highway	Road Proximity - Local	Prominence	Public Transport		Services Availability	Constraints	Environmental Setting	Flexibility				
<b>SOUTH RIBBLE - PREFERRED SITES</b>															
SR/EP1.7 (SR/BC001)	Samblesbury Enterprise Zone	35	0	10	8	5	10	10	10	10	10	3	76	38	None
SR/EP1.2, SR/H51.1 (19S052)	Cuerden Strategic Site	31.93	10	10	10	10	4	7	2	8	10	3	74	30	<ul style="list-style-type: none"> <li>Large scale road infrastructure investment required</li> <li>Housing adjacent</li> <li>Various environmental features on site including ponds and woodland</li> <li>Site includes Stoney Lane landfill also adjacent to the site is quarrying of sand</li> </ul>
SR/EP1.4, SR/H51.8 (19S169) Previous Local Plan Site C2	Moss Side Test Track, Leyland (Titan Business Park)	5.7	2	6	4	5	10	10	10	10	6	10	73	28	None
SR/EP1.5 (19S188)	North of Lancashire Business Park, Farington	9.2	6	10	6	10	4	7	4	7	9	3	66	38	<ul style="list-style-type: none"> <li>Trees on site</li> <li>River Lostock crosses the west of the site, possible flood risk in places</li> <li>Small pond on site.</li> </ul>
SR/EP1.3 (19S119)	Farington Moss, Land at Lodge Lane, Flensburg Way and Penwortham Way, Farington	11.84	5	10	6	5	1	7	2	7	9	3	55	37	<ul style="list-style-type: none"> <li>Trees on site</li> <li>Falls into Existing Local Plan Policy Area AS3, an area of Separation Between Farington, Lostock Hill and Penwortham</li> <li>Household waste depot to the south</li> <li>Various ponds and landscape features to the south</li> </ul>
SR/EP1.6 (19S190)	Land Adjacent to Leyland Business Park, Farington	2.1	4	6	1	10	4	10	10	3	3	3	54	17	None

Source: BE Group, 2024