Representor: FI Real Estate Management Ltd (FIREM)

Contact: Mr John Francis (Plan Red)

Representor ID: A31

STATEMENT OF EVIDENCE

Evidence is co-authored by Gateley, Iceni, JLL, Plan Red & FIREM

Matters 8 & 9 – Employment Land Need and Allocations

Issue 8 – Are the provisions of the plan in relation to the provision of employment land justified and consistent with national policy?

Response to Question 8.1:

Justification for employment land need

We do not think the need figure of 173ha is justified nor its assumptions soundly based. The figure is considered too low and derived from arbitrary assumptions that fail to reflect qualitative issues sought through guidance in PPG, including the need for larger strategic sites / facilities, as well as national priority sectors as set out in the Government's Industrial Strategy.

Need in the CLLP evidence is derived from a past completions trend. Whilst this is a PPG compliant approach, it will fail to incorporate needs that were not manifest in the past and needs to be triangulated with other market signals. For example, rising requirements for the largest units will not be incorporated unless specifically planned for.

As can be seen in table 8.1 below, the 'need' has arbitrarily varied in recent years by virtue of a function of the method deployed, rather than an understanding of what the actual requirements are for each authority. The latest need is below any previous assessment, which is contrary to market signals, which is not considered sound.

A reason for this is that the 2024 ELR changes its period of historic assessment with data analysis relating to 2010-2022 rather than as in previous work (2022 ELR) from 1991 onwards. This is reportedly due to issues around (Para 3.10 of the 2024 study) 'comparison between completions and losses… comparability between the outputs for the three local authorities [not explained] and 'data gaps and anomalous figures in the 1990s and 2000s'. This statement in fact directly contradicts para 7.10 of the 2022 ELR which highlights the data gap being for 2010-12, which remains part of the 2024 assessment period. In fact the 'missing' data for 2010-12 (table 27 of 2022 ELR) does appear in the 2024 study (Table 8).

The overall need is considered manufactured by the approach to calculation rather than a proper analysis of the components of need.

Table 8.1 Central Lancs Needs Evidence and Plan Supply

Area	2019	2022 Need	2024 Need	Submitted Plan Employment Supply (inc. Mixed Use)	Balance (Supply – Need '24)
Chorley	60	76.3	41.5	20.3	**-21.2**
South Ribble	71.7	77.7	74.4	61.3	**-13.1**
Preston	57	71.1	57.0	136.5	**+79.5**
Total	188.7	225.1	172.9	218.1	**+45.2**

Source: BE Group / CL LPAs, FIREM analysis

FIREM consider the need to be around 247 ha (closer to the 2022 ELR derived need), ideally 74 ha above the suggested 2024 need, as explained below and in FIREM's representations on Reg19 version of CLLP.

Most particularly, concerns relate to the drop in need for Chorley from 2022 to 2024 when market signals indicate increasing (not falling) demand for strategic logistics facilities. The issue of this strategic need is acknowledged by the authoring consultants of the various evidence reports:

- 2019[1] Study (para 4.10) – "*identifies the following main gaps: Chorley: larger B8 options.*"
- 2022[2] Study (para 9.13) – *'if less constrained sites can be found with M61 access they should be considered as options to meet needs, particularly if they offer scope to provide the larger B2/B8 properties which remain in demand.'*
- 2024 study (para 2.55/58) – 'transactions focused on higher grade and 'build to suit' space, of 10,000-20,000 sqm each… 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… [supply for Chorley directed to Great Knowley/Botany Bay – but at 6.7 ha would only accommodate a single unit of large scale, woefully below market requirements].

The 2024 ELR evidence effectively 'bakes in' the undersupply of larger premises needs, particularly for Chorley, the evidence itself effectively recognises this.

The 2024 ELR evidence of need falls short because of its failure to recognise qualitative needs of different market segments - and rather it just rolls forward past take up.

This fails to respond to the PPG dealing with "the locational and premises requirements of particular types of business" (PPG Reference ID: 2a-026-20190220) and **most particularly** a failure to respond to PPG Reference ID: 2a-031-20190722 on **strategic facilities** including identifying the scale of need across "relevant market areas" by "analysis of market signals, including trends in take up and the availability

[1] Central Lancashire Employment Land Study – Objectively Assessed Needs Update 2019 Chorley, Preston and South Ribble Councils
[2] Central Lancashire Employment Land Study Update Preston, Chorley and South Ribble Councils 2022

of logistics land and floorspace across the relevant market geographies". FIREM's representations to the Reg19 plan consultation set out the shortfall in provision for these units.

Strategic Needs and Strategies

On 23 June 2025 the UK Government published The UK's Modern Industrial Strategy. The 10-year plan is to significantly increase business investment in 8 growth-driving sectors. It is designed to make it quicker and easier for businesses to invest and create certainty and stability for long-term investment decisions.

The Strategy identifies ten areas where the government will focus intervention to help deliver growth. The most relevant of the interventions here, is to remove planning barriers. In this regard the Strategy states that policy uncertainty and the planning system have acted as blockers to growth, resulting in slow delivery and a perception amongst investors that the UK is a place where it is hard to build.

The Strategy recognises the importance of Logistics in supporting growth across a number of the key IS-8 growth sectors and dedicates a section to Freight and Logistics, commenting that:

"The freight and logistics sector makes a vital contribution to the UK economy and the competitiveness of the IS-8, ensuring that the right goods are in the right place at the right time. In 2023, it contributed approximately £79.8 billion in GVA… Oxford Economics have estimated that in 2019 every pound of output from the freight and logistics sector generated £2 of spending elsewhere in the economy, through supply chains and employee spending – one of the highest economic footprints of any UK sector. They have also estimated that productivity growth could be boosted by 20% if the UK were to become a global leader in the sector."

Given the under identification of employment needs, specifically logistics requirements, identified in the 2024 evidence, FIREM consider that CLLP does not recognise the importance of the logistics sector or acknowledge the need for development in this significant growth sector. CLLP doesn't reflect the Modern Industrial Strategy, risking undermining investment in key industrial sectors.

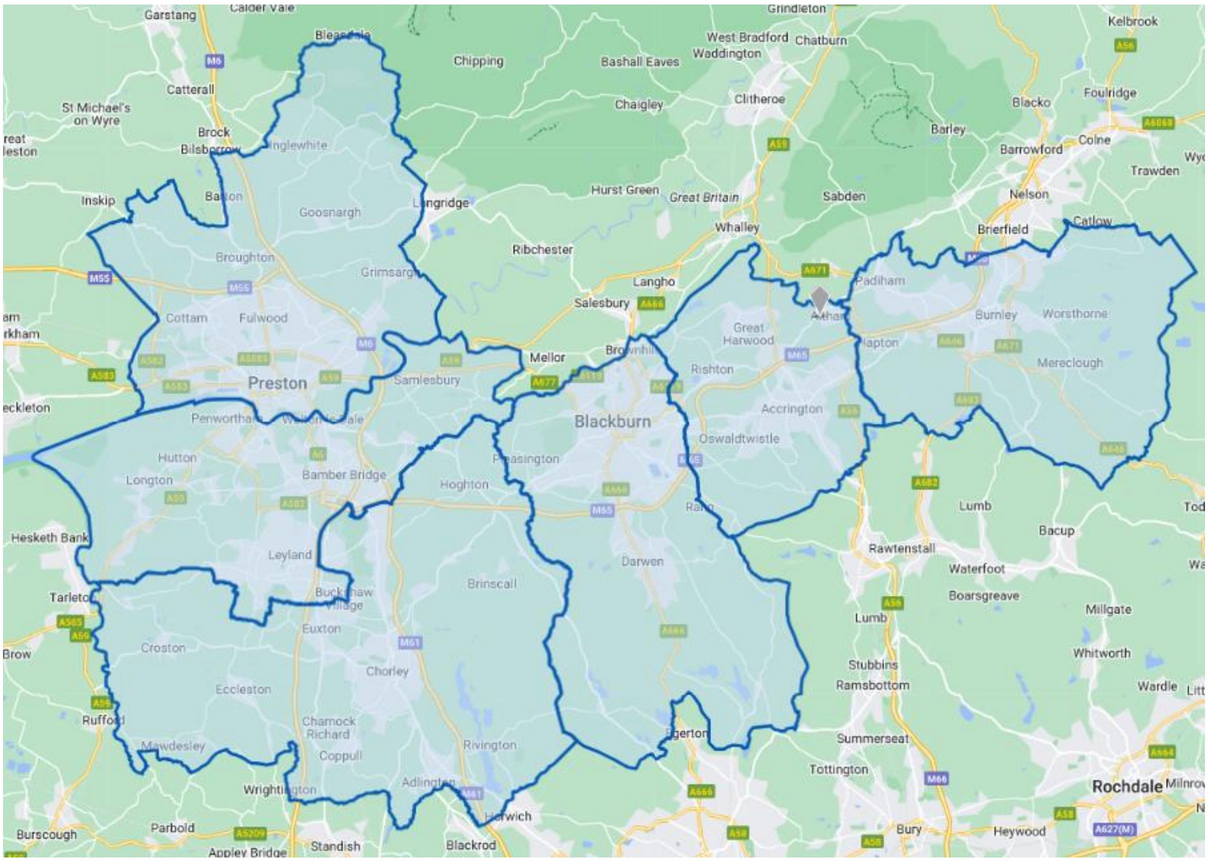
Specific Locational Requirements

Strategic facilities are for those over 9,300 sqm as recognised in numerous studies including the West Midlands Strategic Employment Sites Study 2024. However, there are specific strategic market segments which are relevant to Central Lancs including particular needs of the 'XL Big Box' market of 46,450 sqft+.

Premises with larger floorplates offer economies of scale necessary for the level of investment required in the handling systems and enabling centralisation of storage into regional or national distribution centres. Such premises also offer a greater volume of space. Occupiers considering stockpiling and re-shoring, in order to provide greater control of their supply chain, in response to global and trading instability, require this.

FIREM's representations on Reg 19 version of CLLP set out the relevant market geography for strategic facilities, which stretches beyond Central Lancs, and has been determined through working with occupiers and agencies.

Fig1: Market area for strategic facilities



Source: Iceni Projects/Fisher German

Iceni has considered both a past take up model (lease deals) and past deliveries model across this area to forecast future needs, sharing this back to CLAs, and reviewed capacity of supply to support the need. This demonstrates that ideally a further 74ha, of land is required in CLs to support larger strategic facilities.

This shortfall is in part due to the Plan's reliance on Preston West SS5. Its capacity is considered much lower than the 63ha stated. And it is unlikely to be fully delivered within the Plan period. Both considered alongside the failure to provide for larger units in Chorley where the shortfall is more acute and provision almost nil.

Focusing on the larger market segments, as part of the FIREM regulation 19 representations, and in the Employment Statement submitted in support of FIREM's planning application at Stanworth (attached at Appendix 1), JLL identify requirements in the largest market segment for units of over 46,450 sqm. The Statement identifies, in terms of supply, there are only eight such units nationally available, with only one unit, X-Dock 549 Widnes, located in the NW Region, and none within the Lancashire sub-region.

FIREM's proposal at Junction 3 of M65 would deliver an additional two XL Big Box logistics units to help meet this need at a strategically important location on the motorway network.

These facilities are most able to support national and regional priority sectors such as logistics to support defence, energy and manufacturing, which fall under the

Government's Modern Industrial Strategy. The 2024 evidence fails to consider the consultation on the Government's Modern Industrial Strategy despite being published (Feb 2025) after the consultation (Oct 2024). This consideration is included necessary despite the Plan being considered under the 2023 NPPF.

Response to Question 8.2:

There are reasons to consider that the ELR's conclusions on supply are sound.

In particular we highlight that the ELR 2024 with regard to Preston West notes at table 56 "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." In fact Harworth, the site promoters, in their Reg19 representations also challenge the evidence that this scale of employment at the site is warranted. The ELR 2024 recommendation for the Preston West allocation is 'maybe' as "there are a range of practical issues which would need to be address before an employment allocation could be considered." However, no evidence has been provided that these can be overcome and clarity on the end supply figures should be provided by the council and Harworth in regard to available supply. FIREM already sets out scenarios in response to Question 1.4A which demonstrate that 63.3ha cannot be delivered within the plan period. It may not even be possible to deliver two thirds of the area, i.e. 42ha.

Furthermore, in 2024 it was publicly announced that 15.5ha of available land at Cuerden had been acquired as part of the New Hospitals Programme for the new Royal Preston Hospital. The employment land supply figure should be revised down to take account of this loss.

Issue 9 - Are the proposed employment allocations justified, effective, developable, deliverable, in line with national policy and otherwise soundly based?

Response to Question 9.1:

Strategic Logistics floorspace has a specific set of requirements to support regional and sub-regional distribution facilities:

- Large and regularly shaped footprint – sites should be capable of accommodating a regularly shaped building with a site density no greater than 40 – 45%. The site should allow for a 50m deep yard facing the principal elevation (or both principal elevations, if cross-docked) and separate car parking (approximate ratio of 1 parking space to 1,000 sqft). Based upon a 500,000 sqft (46,450 sqm) unit, this equates to a site of approximately 11ha per XL Big Box unit.
- Motorway/Strategic Road Access – the users require access to all movement motorway junctions and the strategic road network.
- Labour Supply – access to workforce and availability of public transport.
- ESG Agenda – the ESG demands of occupiers and investors are becoming increasingly important factors within the marketplace. This further demand for modern/new warehousing will have a greater impact on existing, aging and

functionally obsolete buildings. Occupiers will need to relocate to more efficient and effective facilities for their own purposes or as part of a corporate or contractual requirement with an end user.

- Power supply – sites need to have a suitable power connection to accommodate manufacturers or logistics operators.

The table below shows that of the proposed B8 employment allocations in the Draft Plan which, based on the above requirements, only 3 are capable of accommodating XL Big Box development and all of these are within Preston.

Policy	Site	Site Area (ha)
SS5	Preston West	63.3
EC2 Chorley		
EC2.1	Land East of M61, Chorley	6.92
EC2.2	Former Gas Works, Bengal Street, Chorley	0.76
EC3 Preston		
EC3.1	Former Alstom Works and Wider Site, Channel Way, Preston	6.35
EC3.2	Preston East Junction 31A M6	25.31
EC3.3	11 Roman Road Farm	24.94
EC4 South Ribble		
EC4.1	Land north of Lancashire Business Park	9.2
EC4.2	Land at Leyland Business Park, Farrington	2.1

The deliverability of these sites, particularly Preston West, is not proven and FIREM believe the concentrated spatial distribution does not take account of the need and ability of Chorley Borough to deliver modern logistics floorspace.

Land at Preston East (EC3.2) already benefits from planning permission for part of the site. The largest unit approved is 130,000 sqft which whilst a Big Box unit is significantly below the requirements of an XL Big Box unit. The site is therefore unable to deliver a strategic XL Big Box development.

It is also understood that 11 Roman Road Farm (EC3.3) is identified for use class B2 only, therefore will not accommodate XL Big Box units (use class B8).

Chorley Borough benefits from a strong strategic location, benefiting from strong access to the strategic highway network via the M6, M61 and M65. This significant motorway connectivity provides the Borough with links to the deep sea and ferry port at Liverpool and the ferry port at Heysham. Furthermore, a study carried out by Model Logistics, provided as an Appendix, commissioned by FIREM states that "within a one hour drive time of the Stanworth site in the north of the Borough, a population of over 7.6 million people can be reached and within two hours the catchment is close to 17 million (based on 2020 population estimates)."

FIREM consider that Chorley Borough is well placed to provide development sites to deliver the employment need identified in the response to question 8.1 and believe that the currently allocated sites do not take adequate account of this position.

With regard to regional and national growth strategies, FIREM can see no evidence that they have been taken into account when identifying the allocated development sites.

Response to Question 9.2:

FIREM does not challenge the delivery of the above sites. However, as mentioned in regard to Matter 9.1 above, only two sites area identified are within the south of the Plan Area, i.e., within Chorley. They are small sites totalling only 7.68ha to be delivered over the plan period. This will deliver an imbalance of new employment land across the plan area which his not sustainable in delivering jobs across the population of Central Lancashire. The distribution of employment land is skewed almost wholly to the north of CL and is poorly planned from a spatial perspective.

Furthermore, the larger sites at EC3.2 and EC3.3 do not provide the opportunity for strategic XL Big Box developments. Again as explained in addressing Matter 9.1, planning permission at EC3.2 does not accommodate any XL Big Box units; and EC3.3 is focussed on manufacturing, i.e., Use Class B2 only. Both sites are welcomed but do not address the strategic need for XL Big Box units as part of the Government's Industrial Strategy.

Response to Question 9.3:

A lack of Employment Land Topic Paper for the Plan makes a clear understanding of demand and supply hard to follow. To add, in the first instance, FIREM highlight an error in the table under EC5 in the Plan, where mixed use sites in Chorley generate 12.66ha of supply, not 2.66ha as reported.

Taking into account the new employment allocations and employment land within mixed use allocations in the plan, the table below has been derived. This highlights the reliance on Preston overall to meet need particularly the Preston West strategic site (reportedly incorporating c.63 ha of employment) to meet Plan needs.

There is a distinct shortfall for land in Chorley with only the following sites over 5 ha and therefore being capable of supporting larger units:

- EC2.1 Land East of M61, Chorley (6.9 ha); and
- EC5.5 Botany Bay/ Great Knowley, Blackburn Road, Chorley (6.7 ha) – which is unlikely to achieve larger units.

In reality each location in Chorley at best might support a single large unit over around 9,300 sqm, which requires around 3 ha of land each, but not capable of accommodating a much larger unit which would require over 10 ha.

8.2 Central Lancs Needs Evidence and Plan Supply

Area	**2024 Need**	**Employment Plan Supply**	**Mixed Use Plan Supply**	**Strategic Site Plan Supply**	**Total Submitted Plan Supply**	**Balance**
Chorley	41.5	7.68	12.66		20.34	**-21.2**
South Ribble	74.4	11.30	50		61.3	**-13.1**
Preston	57.0	73.20		63.3	136.5	**+79.5**

Total	172.9	92.18	62.66	63.3	218.2	**+45.2**

There is no explanation in the Plan as to why Chorley has an under provision of employment land to meet needs identified in the 2024 evidence or previous iterations, that were even higher. Again, this fails to meet the Government's PPG regarding the need to consider ‘employment land by market segment and by sub-areas’ Paragraph: 028 Reference ID: 2a-028-20190220).

Delivering a more equitable range of sites across the plan area is important to ensure the population within the travel to work area of Chorley has fair and accessible opportunities to employment sites. So far the plan is skewed to the north of the plan area, i.e., Preston. This cannot be sustainable and should be corrected.

Model Logic Ltd

M65J3

Logistics Study

Report

October 2022

Model Logic

Introduction to the M65J3 Logistics Study

Background

Model Logic have been instructed by FI Real Estate Management to prepare an independent Logistics Study to support the outline planning application for a warehouse development (Use Class B8 with ancillary B1(a) offices) and associated infrastructure on land adjacent to Junction 3 of the M65 Motorway.

This Study will assess the locational characteristics of the M65J3 site and whether this would be an optimal location for a Logistics Park based on operator and end user requirements. In the absence of a named end user for this site at this stage in the planning process, this report has been undertaken to determine an identified need from large scale logistics and distribution end users to operate in this location within the Borough as well as the wider region.

This Study and associated reports, focuses on the current need and supply and provides an up-to-date market overview and assessment of alternative employment sites including those within Chorley and outside the Borough on a regional and sub-regional level, along principal motorway corridors, including sites along principal motorway corridors of the M65, M61, M6 and M55. Nearby centres of population include Preston, Blackburn, Burnley, Chorley and Bolton, together with easy access into the city of Manchester. The report considers the current market for logistics and industrial buildings in excess of 100,000 square feet.

Model Logic is a supply chain and logistics consultancy with a 30 year track record of delivering complex strategic supply chain projects to a wide range of Blue Chip organisations across numerous industry sectors – from grocery, food and drink, pharmaceuticals, media and entertainment, through to DIY, building and gardening supplies.

Model Logic offers extensive supply chain knowledge and experience, supported by a range of strategic and operational modelling tools and have worked with a number of Blue Chip Logistics Operators to provide a framework for evaluating optimum locations for their distribution hubs and warehouses.

Definition of Terms (1)

A **Supply Chain Network** is a configuration of facilities arranged to allow the movement of materials from their source locations to their final customers. A network can take many different forms dependent upon the nature of the company's business, its role in the supply chain and its size. The diagrams below show three alternative networks for a retail company.

Network Design is the process of evaluating alternative configurations of facilities, in terms of their number, size and roles. The design process is usually supported by using computer models together with digital maps and road networks to evaluate a range of options. The objective of the modelling has historically been to identify the minimum cost network, but can be extended to include other parameters including service level, carbon footprint and labour availability.

Central Warehouse with Direct Transport

Regional Warehouses

Hub and Spokes

Example Retail Network Configurations

Definition of Terms (2)

A transport route can be described as a combination of a **Stem** element and a series of **Calls** (petal element)**.** In the example, a vehicle is planned to travel from M65J3 to make five calls in the Chorley area. The distance from the start to the first call is described as the **Stem Distance** and the time to travel is the **Stem Time.** The distance between each of the calls is described as the **Inter-drop Distance** and the time between calls is the **Inter-drop Time**.

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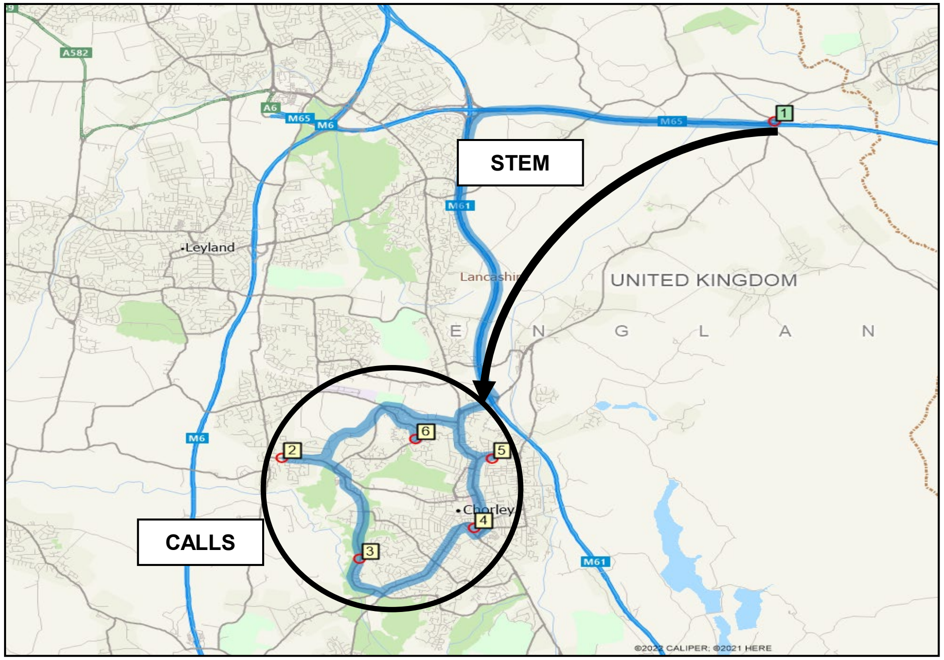


An **Import Centre** is a facility, usually a warehouse, where goods are received from a port or an airport. Goods are received in bulk form, typically by container or airline unit load device (ULD). The containers or ULDs are emptied (de-stuffed) and the products are either re-stacked onto pallets or fed into an automated storage system. The Import Centre either supplies directly to end customers or feeds a number of regional or local warehouses across the country. An **Export Centre** is a facility that prepares goods for export and involves filling (stuffing) containers or airline ULDs.

Model *Logic*

Introduction to Network Design and Warehouse Location

This report has been prepared through the eyes of an end user or operator who may be a retailer, manufacturer, wholesaler or service provider and identifies the steps taken by these operators when undertaking a search to identify an optimum location. A third party logistics company may be contracted to operate a specific site, however the principles of network design will still apply. Designing an effective distribution network is one of the key elements of an end user's sustainability strategy. Configuring a network of warehouses of the correct size in their ideal locations determines the efficiency of transport routes both of a primary and secondary nature. Locating warehouses in the wrong configuration can lead to inefficient routes and incurring excess mileage and carbon usage.

Although the shape and size of an operator's network will vary dependent upon the nature and size of the business, the principles of network design remain the same. A range of parameters are included within an analysis, including:

- Location and demand of customers, either Business-to-Consumer (B2C) or Business-to-Business (B2B)
- Required service offering to customers in terms of supply lead time
- Source location of products together with their characteristics in terms of size, weight, stock levels and value
- Primary and secondary transport parameters, including vehicle capacities and operating costs
- Warehouse parameters, in terms of size, operating methods and costs, both development and operational
- Motorways, regional and local road network, including road speeds
- Availability and costs of local labour and ease of travel to work. This is currently highly rated due to labour shortages.

To evaluate the ideal network for an end user it is usual to construct a network computer model of the supply chain which takes into account all of the parameters described above. Where the location and sizing of new facilities is being evaluated the model will provide a ranking of possible locations based upon the required balance between service, cost and sustainability. The ranking can be categorised into gold, silver and bronze locations in order to provide a brief to commercial agents to undertake a search.

Evaluating the potential of specific development sites in order to attract end users turns the objective of the exercise on its head. The question becomes how well suited is the location and size of the site to synchronise with the network strategies of a range of end users. The methodology used in this report is to analyse the theoretical performance of the M65J3 site against other locations using end user objectives as a guide.

Principles of Drive Time Analysis

Digital Maps and the Road Network

Digital maps, including the latest road network have been used to calculate the distances and travel times between selected points.

Population Data

Where information on specific end users' business isn't available the most robust method of analysis is to use population as an indicator of consumer or customer demand. Estimates for 2020 are used as the basis of analysis. In addition to population the census data that has been used also includes the number of households and the weekly income per household.

Drive Time Analysis

A key aspect of using digital maps is the ability to undertake drive time analysis which creates drive time zones from a selected start point. The shapes of the zones that are created depend upon where the roads are located and the driving speeds for the different road types. There can be a choice of whether the quickest or shortest route is taken. For this Study the quickest route is used.

Once the drive time zone has been established it is then possible to summarise the population characteristics within it and also calculate its area, in square miles.

The map shows the boundaries of the zones that can be reached within 45, 60 and 90 minutes drive from the M65J3 site. Based upon average drive speeds.

The M65J3 Location

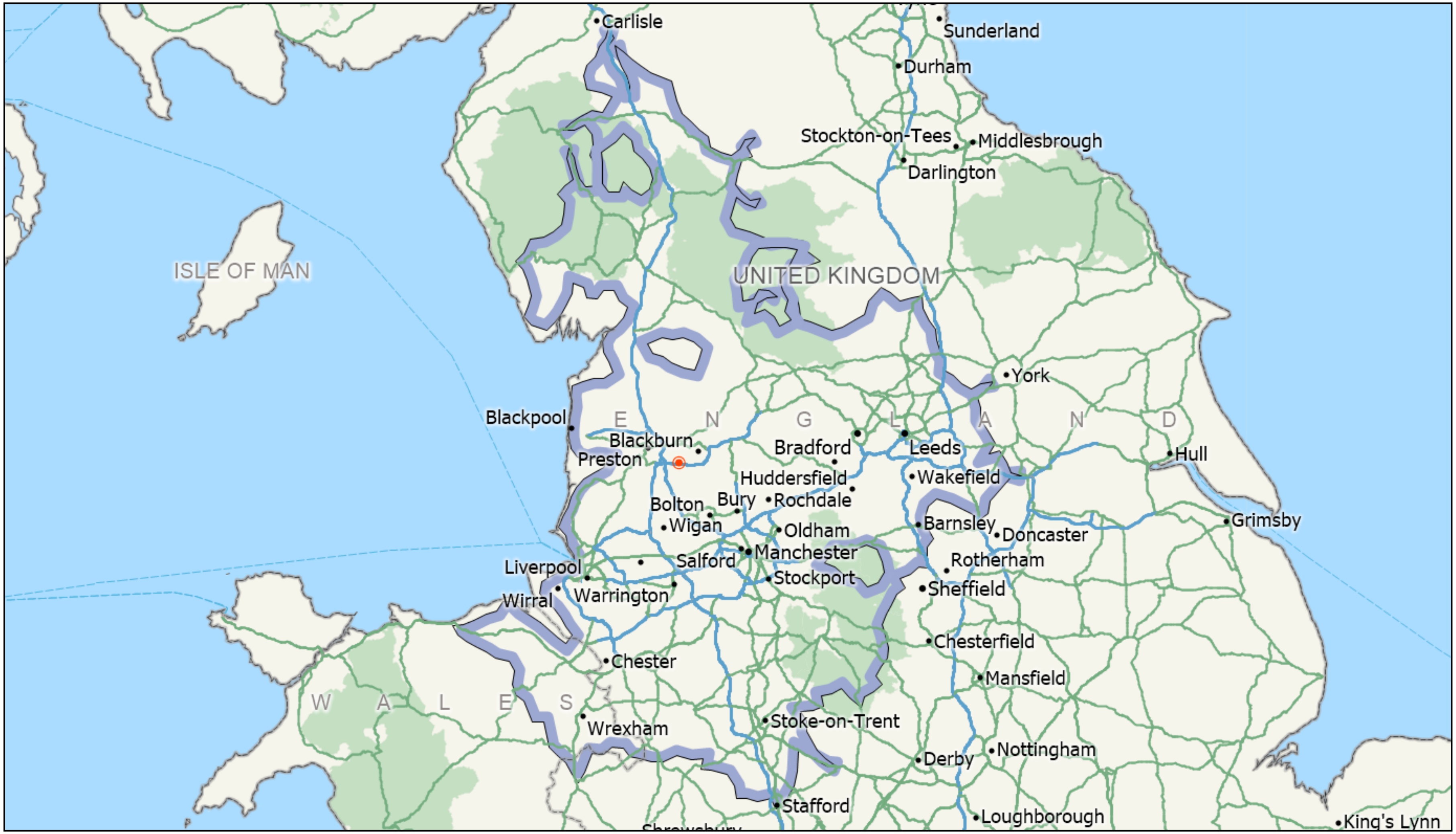
The M65J3 site is located in a prime location to the north of Manchester, within easy reach of the major towns of Chorley, Preston and Blackburn. The region is well served by local motorways M65, M6, M61, M55, M66 and easy links to the M62 for communications with other Northern Powerhouse cities of Liverpool, Leeds and Hull. The site also has motorway links to the deep sea and ferry port at Liverpool and the ferry port at Heysham. The airports at Liverpool and Manchester are both within one hours drive.

The Drive Time to Population Centres Table shows the population by postcode area (PCA), ranked by the closest PCA. This shows that within a one hour drive time a population of over 7.6 million can be reached and within two hours the catchment is close to 17 million (based upon the latest 2020 population estimates). The North West has a dense network of connected motorways which means that a high proportion of business journeys over 10 miles will involve using a motorway. This is reflected in the large area that can be covered within a drive time zone of 45 mins or one hour. Given the high population densities of Manchester, Liverpool, Warrington and Preston the drive time area yields an attractive local customer base for business development.

Drive Time to Population Centres

Postcode Area (PCA)	Postcode Area Name	Population	Distance from M65J3 (miles)	Time from M65J3 (mins)	Cumulative Population
PR	Preston	521,000	9	13	521,000
BB	Blackburn	490,000	13	14	1,011,000
BL	Bolton	421,000	12	23	1,432,000
WN	Wigan	317,000	19	28	1,749,000
M	Manchester	1,255,000	30	32	3,004,000
FY	Blackpool	291,000	27	32	3,295,000
WA	Warrington	631,000	30	39	3,926,000
OL	Oldham	508,000	36	40	4,434,000
L	Liverpool	903,000	36	48	5,337,000
SK	Stockport	612,000	43	48	5,949,000
HX	Halifax	165,000	37	50	6,114,000
BD	Bradford	600,000	42	56	6,714,000
CW	Crewe	335,000	52	56	7,049,000
HD	Huddersfield	272,000	51	60	7,321,000
LA	Lancaster	337,000	57	60	7,658,000
CH	Chester	693,000	59	64	8,351,000
LS	Leeds	835,000	67	74	9,186,000
WF	Wakefield	568,000	69	74	9,754,000
HG	Harrogate	146,000	57	75	9,900,000
ST	Stoke-on-Trent	647,000	68	77	10,547,000
CA	Carlisle	318,000	95	92	10,865,000
S	Sheffield	1,445,000	72	95	12,310,000
TF	Telford	251,000	89	98	12,561,000
DE	Derby	776,000	91	102	13,337,000
LL	Llandudno	540,000	99	103	13,877,000
WS	Walsall	520,000	98	106	14,397,000
DL	Darlington	363,000	90	109	14,760,000
SY	Shrewsbury	329,000	100	110	15,089,000
YO	York	561,000	106	110	15,650,000
WV	Wolverhampton	417,000	99	113	16,067,000
DN	Doncaster	760,000	110	118	16,827,000

Regional Analysis - M65 J3 – 90 mins Drive Time Zone



Model *Logic*

The map shows the boundary of the zone that can be reached within 90 minutes drive from the M65J3 site. Based upon average drive speeds.

Regional Analysis – Competitive Site Comparison – 90 mins Drive Time

This section of the Study assesses how the site performs against a selection of other motorway junctions and development sites, when considering a 90 minutes drive time.

A 90 minutes stem drive time is a useful guide for a warehouse that is to have regional coverage. Typically a large retailer or wholesaler may have eight to ten regional sites covering the UK.

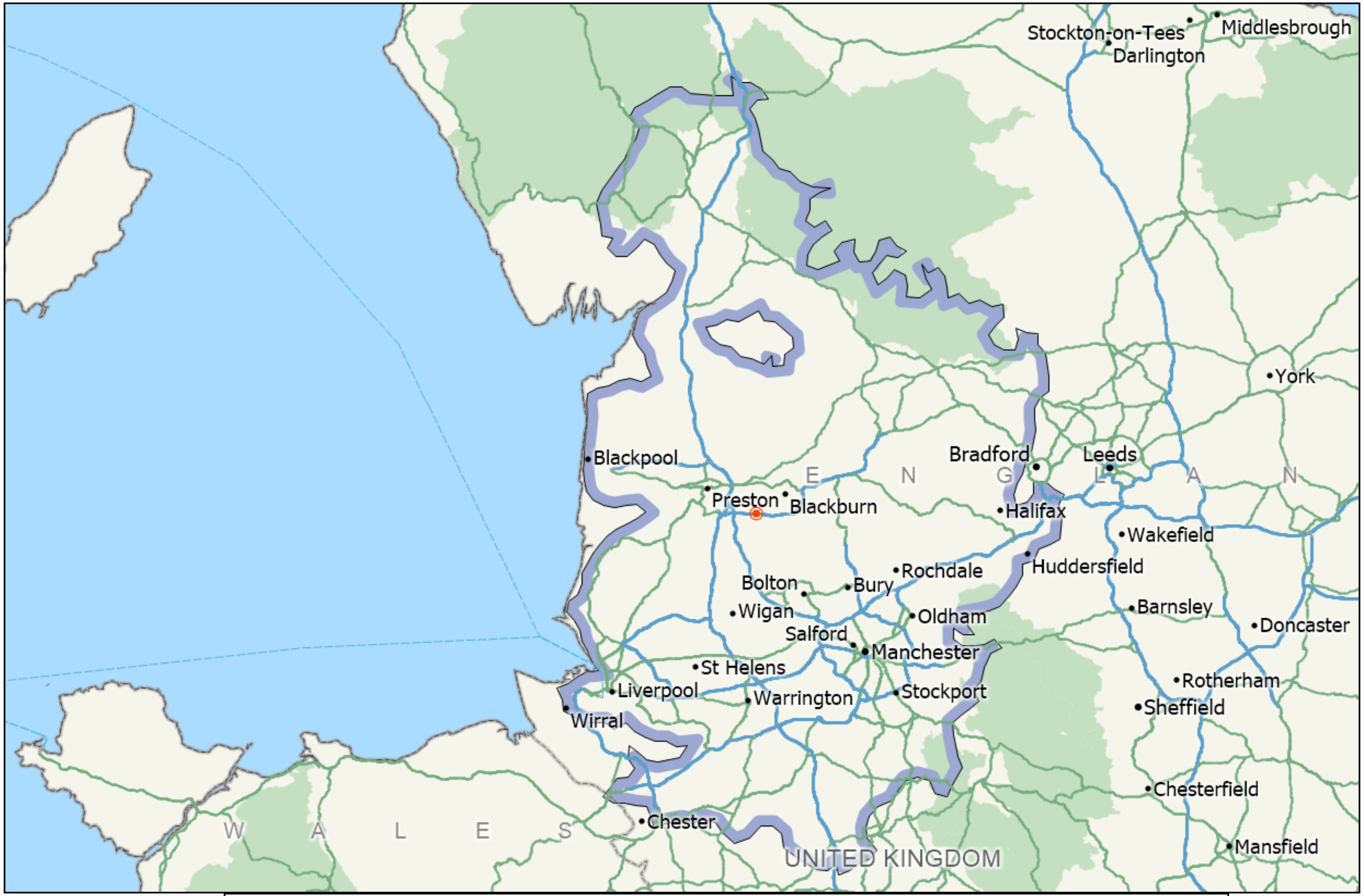
The table shows the population within a 90 minutes drive time from a selection of motorway junctions in close proximity to M65J3. The results show that sites further south and east than M65J3 have better access to the M6 and M62 serving higher population centres in the north Midlands and west Yorkshire. Sites further north are limited by the coastline in the west and low population, green land areas in the north.

The table also shows, for each motorway junction, the area in square miles that can be reached, the number of households and their average weekly income.

Figures are based upon the latest estimates for 2020.

MW Junctn	Area (square miles)	Weekly Household Income	Households	2020 Population	% Most Popultaion	% Most Population excl M61
M61 J6	7,638	£640	4,942,786	12,250,169	0.00%	
M61 J8	6,895	£639	4,551,057	11,232,447	8.31%	
M65 J8	6,360	£640	4,519,110	11,189,462	8.66%	0.00%
M65 J5	6,442	£639	4,470,575	11,042,496	9.86%	1.31%
M65 J2	6,958	£639	4,442,985	10,961,783	10.52%	2.03%
M65 J9	6,037	£639	4,423,897	10,940,951	10.69%	2.22%
M6 J29	6,905	£639	4,427,010	10,922,707	10.84%	2.38%
M65 J4	6,438	£640	4,396,595	10,852,011	11.41%	3.02%
M6 J27	7,000	£637	4,389,437	10,846,914	11.45%	3.06%
M65 J7	6,098	£639	4,387,762	10,838,961	11.52%	3.13%
M65 J3	6,657	£639	4,383,729	10,817,708	11.69%	3.32%
M6 J28	6,702	£638	4,376,685	10,805,063	11.80%	3.44%
M6 J31	6,684	£639	4,366,893	10,774,308	12.05%	3.71%
M65 J6	5,967	£640	4,293,802	10,606,487	13.42%	5.21%
M6 J31A	6,326	£638	4,286,270	10,582,549	13.61%	5.42%
M55 J1	6,251	£637	4,254,237	10,497,347	14.31%	6.19%
M55 J1A	5,939	£637	4,187,366	10,337,803	15.61%	7.61%

Local Analysis - M65 J3 – 60 mins Drive Time Zone



The map shows the boundary of the zone that can be reached within 60 minutes drive from the M65J3 site. Based upon average drive speeds.

Model Logic

Why use 60 minutes for Drive Time for Local Analysis?

In order to emphasise the green credentials of the M65J3 site it is assumed that local deliveries are made using Electric Vehicles (EVs). EVs currently have a maximum driving distance of 150 miles (100-200 miles), which could be less in cold weather. From a sample of routes the average speed for the stem element of the delivery route is approximately 46 mph (see table Sample Stem Journeys from M65J3).

Using the route parameters for a typical local delivery operation (eg grocery home delivery) the ideal stem time is 60 minutes (see table Typical Local Delivery Route), which provides a practical working day for the driver of around 8 hours. Increasing the stem drive time to 75 minutes reduces the effective time for making deliveries and produces a working day of only 6 hours.

Based upon this high level analysis, the 60 minutes stem time is deemed as the best basis for comparing catchment areas for siting a local delivery facility within the vicinity of M65J3.

Sample Stem Journeys from M65J3

From	To	Distance (miles)	Time (mins)	Speed (mph)
M65J3	Preston	9	15	36
M65J3	Chorley	6	13	28
M65J3	Blackburn	9	13	42
M65J3	Blackpool	27	33	49
M65J3	Bolton	14	19	44
M65J3	Bury	19	33	35
M65J3	Rochdale	34	37	55
M65J3	Wigan	19	26	44
M65J3	Warrington	29	34	51
M65J3	Liverpool	42	50	50
M65J3	Manchester	34	42	49
M65J3	Halifax	39	53	44
	Total	**281**	**368**	**46**

Typical Local Delivery Route

Stem time	30	45	60	75	mins
Stem speed	46	46	46	46	mph
Stem distance	23	34.5	46	57.5	miles
Two way stem distance	46	69	92	115	miles
Max EV Distance	150	150	150	151	miles
Two ways stem time	60	90	120	150	mins
Non stem distance	104	81	58	36	miles
One interdrop time	8	8	8	8	mins
One drop time	5	5	5	5	mins
Interdrop speed	15	15	15	15	mph
Interdrop distance	2	2	2	2	miles
Max No drops	52	40.5	29	18	
Total drop time	260	202.5	145	90	mins
Total interdrop time	416	324	232	144	mins
Total non stem time	676	526.5	377	234	mins
Total time (mins)	736	616.5	497	384	mins
Total time (hours)	12.27	10.28	8.28	6.40	hours

Model Logic

Local Analysis - Competition Site Comparison – 60 mins Drive Time

This section of the Study assesses how the site performs against other competing sites when considering a local analysis with a 60 minutes drive time.

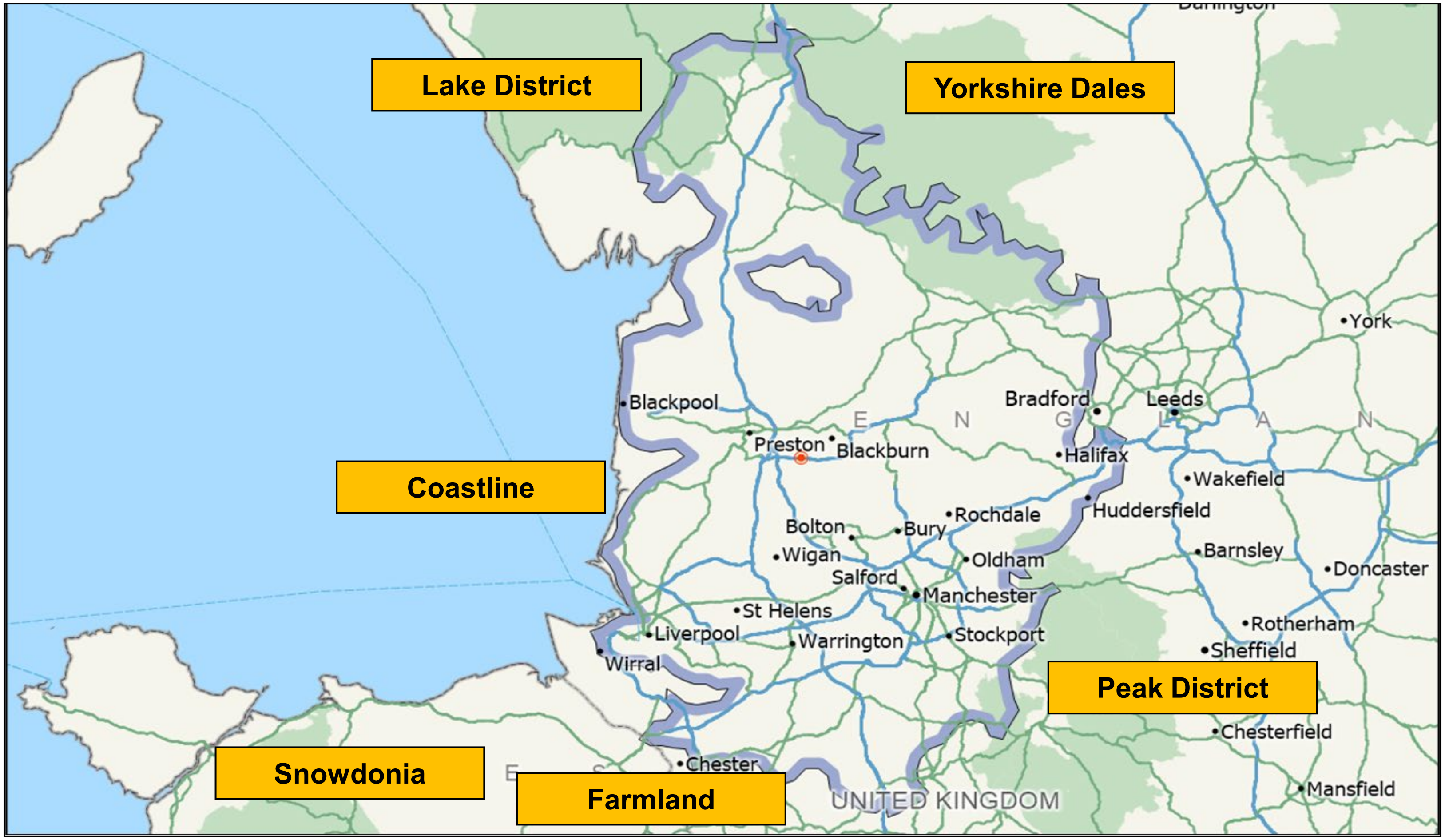
The table shows the population within a 60 minutes drive time from a selection of competitor sites in close proximity to M65J3. The results show that sites that are closer to the Manchester population centre score better than M65J3. The population density to the north of the territory is low.

The table also shows, for each competitor site, the area in square miles that can be reached, the number of households and their average weekly income.

Figures are based upon the latest 2020 estimates.

Motorway Junction	Area (square miles)	Weekly Household Income	Households	2020 Population	% Most Population	% Most Population excl M61
M61 J6	3,644	£625	3,407,778	8,480,134	0.00%	
M6 J27	3,502	£625	3,062,106	7,529,331	11.21%	0.00%
M61 J8	3,427	£624	3,026,587	7,467,413	11.94%	
M65 J2	3,543	£627	3,010,047	7,407,443	12.65%	1.62%
M6 J29	3,515	£626	2,980,443	7,336,001	13.49%	2.57%
M65 J3	3,366	£626	2,944,352	7,259,990	14.39%	3.58%
M65 J5	3,251	£626	2,923,687	7,249,015	14.52%	3.72%
M65 J8	3,270	£630	2,919,439	7,247,241	14.54%	3.75%
M6 J28	3,400	£625	2,935,558	7,226,825	14.78%	4.02%
M65 J4	3,256	£625	2,913,671	7,209,666	14.98%	4.25%
M65 J7	3,115	£627	2,823,204	7,010,932	17.33%	6.89%
M6 J31	3,450	£623	2,843,628	7,004,771	17.40%	6.97%
M65 J9	3,104	£629	2,809,248	6,970,841	17.80%	7.42%
M65 J6	3,024	£626	2,768,102	6,872,837	18.95%	8.72%
M6 J31A	3,217	£621	2,725,787	6,719,789	20.76%	10.75%
M55 J1	3,292	£620	2,613,423	6,446,504	23.98%	14.38%
M55 J1A	3,083	£619	2,504,518	6,190,577	27.00%	17.78%

Catchment Area Considerations – Constrained Geography



Drive Time (mins)	Motorway Junction	Area (square miles)	Weekly Household Income	Households	Population	Pop Density (Pop / square mile)
45	M65 J3	2,006	£611	2,116,027	5,249,760	2,617
60	M65 J4	3,366	£626	2,944,352	7,259,990	2,157
90	M65 J5	6,657	£639	4,383,729	10,817,708	1,625

Model Logic

Links to Northern Ports and Ferry Terminals

The M65J3 site is approximately 33 miles from the Liverpool2 deep sea container port and Liverpool's ferry terminals to Northern Ireland and Ireland.

The ferry terminals at Heysham is 38 miles and Cairnryan (Stranraer) is 207 miles. Northern Ireland has a population of approximately 1.9 million people and clients' stockholding, when employing a small number of warehouses, is likely to be on the mainland GB. A distribution centre located in northern England would service Northern Ireland. Although Heysham is closer to M65J3 than Cairnryan, the total journey time to Belfast, including the ferry sailing is less from Cairnryan. The frequency of sailings from Cairnryan is currently more frequent than from Heysham. Using Heysham, however would reduce the road miles travelled and hence carbon footprint.

The distance to the east coast ferry terminal at Immingham is 125 miles, providing an easy route to Western Europe and Scandinavia.

Importance of Liverpool as a Deep Sea Port

Number of Miles Travelled from Port to RDCs

	RDC Location								
Port	**Cambridge**	**Portbury**	**Stretton**	**Leatherhead**	**Birmingham**	**Pontefract**	**Glasgow**	**Washington**	**Total**
Liverpool	127,464	48,612	20,638	208,583	55,836	55,527	47,437	24,191	588,288
London Gateway	43,281	43,993	142,926	44,196	76,659	118,346	91,519	41,479	602,398
Bristol	117,398	949	103,554	107,229	51,395	120,225	81,834	41,920	624,504
Southampton	88,602	28,577	144,412	65,772	77,614	139,502	95,520	46,449	686,447
Felixstowe	48,111	58,588	157,750	101,071	88,532	122,664	93,085	42,493	712,294
Teesport	131,560	70,441	90,306	246,570	96,720	46,105	42,603	5,934	730,237
Newcastle	150,029	77,774	109,129	271,600	111,795	63,494	35,727	1,640	821,188

Parameters	**Based upon total volume of 100,000 pallets / year**								
RDC Factor	16.42%	6.52%	16.73%	22.25%	13.40%	15.46%	5.60%	3.63%	
Pallets / Trip	25	25	25	25	25	25	25	25	
Pallets / Year	16,416	6,517	16,730	22,246	13,399	15,456	5,604	3,630	100,000

The figures in the table show a calculation of the annual one-way mileage travelled from each deep water port location in the UK to each of eight regional distribution centres (RDCs). Product is assumed to be imported by container through each port and transported to each RDC in proportion to population. The example assumes 100,000 delivered pallets per year .

The analysis shows that Liverpool has the lowest road based cost for national distribution from the UK's deep water ports. Given the attractiveness of Liverpool as a port to feed into a national distribution network, the benefits in terms of cost and carbon footprint will reflect positively on the M65J3 site and enhance its potential role as an import centre.

Multiple Warehouse Scenarios

The table below shows the optimum locations of a warehouse network of various sizes, based upon travel time weighted by the 2020 population. The analysis does not consider land values, rental costs or the costs of labour.

Number of Warehouses	Network with Minimum Travel Time, Weighted by 2020 Population
1	Coventry (CV)
2	Manchester (M), Uxbridge (UB)
3	Manchester (M), Uxbridge (UB), Glasgow (G)
4	Enfield (EN), Worcester (WR), Wakefield (WF), Glasgow (G)
5	Manchester (M), Enfield (EN), Bristol (BS), Derby (DE), Glasgow (G)
6	Manchester (M), Enfield (EN), Bristol (BS), Birmingham (B), Wakefield (WF), Glasgow (G)
7	Manchester (M), Dartford (DA), Uxbridge (UB), Bristol (BS), Birmingham (B), Wakefield (WF), Glasgow (G)
8	Manchester (M), Dartford (DA), Uxbridge (UB), Bristol (BS), Birmingham (B), Sheffield (S), Newcastle (NE), Glasgow (G)

The centre of population of mainland Great Britain is located within the CV (Coventry) postcode. This location provides the least travel time to all postcode areas (PCA), weighted by the 2020 population of the PCA. The location is close to the area known as The Golden Triangle which has been the focus for development of large distribution facilities.

The analysis highlights how prevalent Manchester (PCA=M) is within the ideal solution for a multiple warehouse network, appearing in six out of eight of the minimum travel time networks.

Two Warehouse Scenarios

Two Warehouse Scenario, Minimum Travel Time

The minimum travel time solution for a two warehouse network is a combination of the postcodes M (Manchester) and UB (Uxbridge).

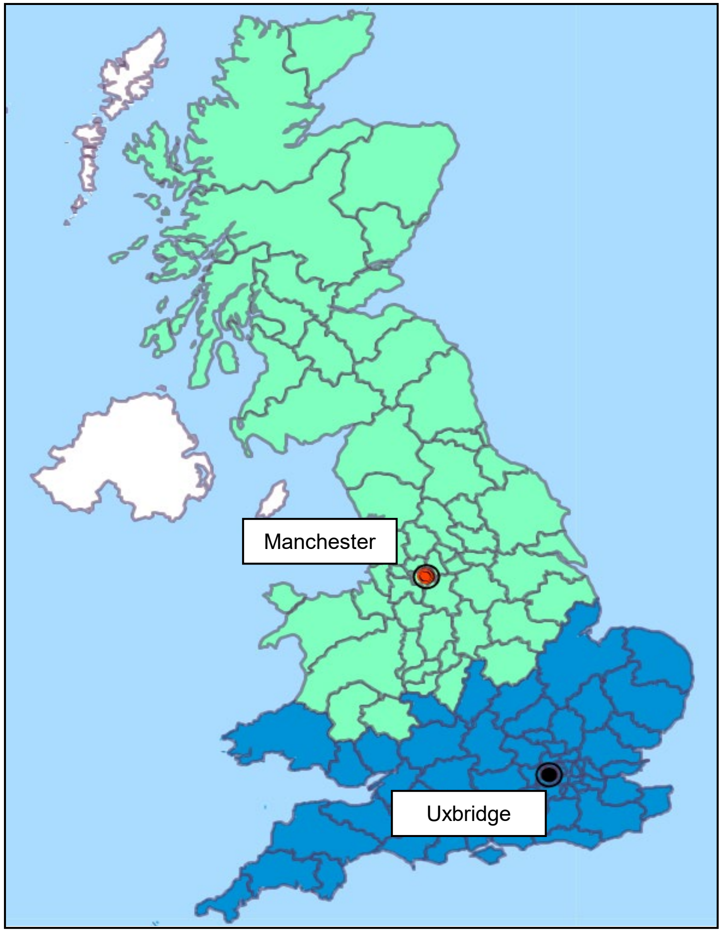
Two Warehouse Scenario, including M65J3

If the site at M65J3 is paired with its ideal second location in postcode SL (Slough) the total weighted travel time is only 0.04% more than the minimum of M and UB. This means that the site at M65J3 is an excellent location for a two warehouse network solution.

The two warehouse solution is significant because of the large sizes of the M65J3 warehouses which compliment a small network strategy.

Supply Chain Resilience

A supply chain network based upon two or more warehouses can demonstrate greater resilience in times of disruption and catastrophic events.



Two Warehouse Network – Minimum travel time, weighted by 2020 population

Model Logic

Location Decisions – Other Considerations

Labour Availability

Over the past five years the logistics industry has suffered from a shortage of skilled workers, both within the warehouse and also lorry drivers. This has arisen due to a number of reasons including Brexit, Covid and an ageing workforce. The shortage of workers has led to the companies on established distribution parks having to pay more for their skilled labour. Many companies considering the location of new facilities are giving higher priority to the availability of skilled labour and being more cost efficient. There is now a trade off between having an optimum location from a total network point of view and providing a effective workforce at a reasonable price.

Cost of Warehouse Labour and Drivers (1)

In line with the shortage of labour at the UK's major distribution parks the salaries and hourly rates of warehouse operatives and drivers are higher than average, by 7-8%. The North West of England has between 1-4% higher rates than average UK. At a more local level, the rates in the M65J3 region is 4-6% lower than the national average and 5-7% lower than the average NW rates. A comparison with the Golden Triangle region of the West Midlands shows within the M65J3 region the rates are 13-14% lower.

Rent and Rates (2)

Analysis of June 2022 rental figures by Savills, shows that the average rental costs within the popular East Midlands distribution zone is estimated as £9.75 per sqft. The equivalent estimates for the North West are £8.50 per sqft. Local estimates for the M65J3 region are £7.50 per sqft.

Implications for M65J3

Based upon the above research of labour costs together with rent and rates, an analysis of total cost to serve would show that the M65J3 location is competitive with the major distribution locations within the UK.

Sources: (1) Indeed.com October 2022 (2) Savills Big Shed Briefing July 2022

Sustainability Considerations

Sustainability has become one of the main objectives for warehouse occupiers, also with the realisation that following green principles can lead to lower costs. With the 2022 hike in energy prices adopting designs that reduce consumption will reap rewards. Considerations for the M65J3 warehouse design include:

- Smart Lighting – including the use of modern LED systems and intelligent sensors for movement, time of day and light levels
- Photo Voltaic (PV) Roof Installations – the electricity from PV cells on roof spaces of 500,000 sqft and 700,000 sqft could potentially supply the whole power requirements for a traditional, ambient warehouse. PV car ports are also an option.
- Electric Forklifts – the use electric forklifts is more favourable than diesel for internal use.
- Electric Vans – the use of electric vans for local deliveries, up to 200 miles round trip, is feasible
- Employees Electric Cars – the PV installations can be used to supply employees' electric cars
- Rain Water Harvesting – rain water can be captured and stored and then used within toilets and vehicle washing facilities
- Roof Lights – providing natural light from 10-15% of the roof space
- Office Positioning – on narrow footprint, with dual aspect glazing
- Waste Management – provide all infrastructure to allow recycling both on and off site
- Combined Heat and Power (CHP) – manage seasonal and daily demands for power

The M65J3 site has the potential to provide many design features which would provide a highly sustainable warehouse for occupiers and potentially operate with low energy costs.

Client Considerations – Types of Companies

This section of the Study describes some of the likely types of end users who should be attracted to the M65J3 site with the 500,000sqft and 700,000 sqft facilities. The role of the site could be for storage, fulfilment, sortation or cross docking.

Companies with a Single or Small Network of Regional Warehouses

- Non grocery retailers, including electrical, furniture and fashion (eg The Range, ASOS)
- Multi-channel and Omni-channel retailers (eg John Lewis, B&Q)
- Food and drink wholesalers and Bond Providers (eg London City Bond, DFS Worldwide)
- General wholesalers (eg MX Wholesale, Pound Wholesale)
- Parcels hub (eg DPD, Parcelforce, UPS)
- E Commerce fulfilment or home delivery hub (eg Amazon, Ocado, Evri)
- Large logistics service providers (eg DHL, Culina Group, Maersk)

North West Manufacturing Companies wishing to Operate a National Distribution

- Local food and drink producers (eg Kelloggs, Heinz, Princes, Halewood, Interbrew, Diageo)
- Local non food manufacturers (eg Astra-Zeneca, Unilever)

Importers (via Liverpool and Heysham)

- Irish food and drink producers
- Imports from USA, Canada and S America
- Raw materials and ingredient suppliers
- Imports on behalf of retailers (eg Adidas, Asda, ASOS, John Lewis, Primark)

Companies undertaking Local deliveries (60 minutes stem drive time)

- Any company undertaking “last-mile” deliveries
- Home grocery delivery (eg Amazon Fresh, Ocado, Waitrose)
- Home non grocery delivery (eg Amazon, John Lewis)
- Parcels depot (eg Amazon, DPD, Parcelforce, UPS)
- If national, could have 15-25 sites around the country

Client Considerations – Sizing of Facilities

The ideal sizing of a client or end user facility will depend upon the scale and type of business. Some general estimates are:

Regional Warehouse or Hub

- 150,000 – 300,000 sqft (14,000 – 28,000sqm)
- 10 – 15 acres (4 – 6 hectares)
- 10-20 metres high
- Part of a network of 4-8 warehouses nationally

Large Regional / National Warehouse or Hub

- 250,000 – 800,000 sqft (24,000 – 75,000sqm)
- > 15 acres (> 6 hectares)
- 10-40 metres high, dependent upon the level of automation
- Either a single warehouse or part of a small network of 2-3 warehouses

Local Warehouse or Fulfilment Hub

- 50,000 – 200,000 sqft (5,000 – 19,000sqm)
- 5 – 10 acres (2 – 4 hectares)
- 8-10 metres high
- If a national home delivery company, could have 15-25 depots around the country
- If a fulfilment centre could have 1-2 sites nationally, including returns processing

- For small fulfilment hubs there is a proportionately larger requirement for vehicle parking

Multi-channel or Omni-channel Retail companies may combine different styles of operation and geographical coverage onto the same site. Returns management is also a key consideration.

Conclusions

Based upon the detailed modelling and analysis undertaken within the Study, M65J3 ranks highly when compared to other sites and locations, particularly for a one, two or three warehouse network. The main observations are:

1. The large size of the units at M65J3 and its location, indicate its ideal functions as a single national site; part of a network with a small number of facilities or a site with multiple roles, for example multi-channel retail or a multi-client third party logistics provider

2. The Manchester region features positively in network design analysis to identify ideal multiple warehouse locations, appearing in six out of eight of the minimum time travel to the 2020 population for different sizes of network

3. The M65J3 site is particularly attractive as a two warehouse network, being only 0.04% more in travel time to population centres than the minimum network of Manchester and Uxbridge

4. The M65J3 site is close to local cities and towns including Chorley, Preston, Blackburn and Burnley which provide a local market for home delivery and also an excellent catchment area for recruiting staff

5. When compared to sites in Manchester, the rental costs at M65J3 are £1 per sqft cheaper and labour costs 5% less. This would negate any additional distance travelled to population centres

6. M65J3 is a prime site to locate an Import Centre linked to Liverpool2 docks. The Import Centre could be considered as a stand alone site or its role could be combined with providing regional or national distribution

7. When compared to other deep sea ports, Liverpool2 has the minimum road transport costs to a network of regional distribution centres supporting their individual customer bases. This should add to the credentials of M65J3 as a good location in terms of sustainability

8. The site has good access to ferry terminals at Liverpool, Heysham, Cairnryan and Immingham for transport to and from Northern Ireland, Ireland, Western Europe and Scandinavia

9. The M65J3 site layout is ecology friendly. The warehouses and site operations have the potential to include many sustainability features

10. The population density of the region immediately north of M65J3 is relatively low, which means that sites that are further south and closer to Manchester have a better population coverage and suitable for local deliveries within 60 minutes

August 2025

jll.com

Employment Land Statement

FI Real Estate Management Ltd
Land adjacent to M65 J3, Stanworth, Chorley

SEE A BRIGHTER WAY

Contents

1. Introduction

1.1. The Industrial and Logistics market is divided into a number of size bands by floor area and building specification. This report is focussed on Grade A big box units, with a particular focus on 'XL' big box units. The term 'big box' relates to units over 100,000 sq ft. Grade A refers to units built to a modern specification to include 12.5m minimum eaves height; minimum 50m deep yard and one loading door per 10,000 sq ft of floor area. For the purpose of this report, 'XL' big box units refer to units of 500,000 sq.ft. and above. Grade A units of this scale typically benefit from a minimum of 15m eaves height, minimum 50m deep yard and one loading door per 10,000 sq ft of floor area

1.2. During 2020-2022, Covid 19 was the major disruptor. Traditional retailing was severely impacted resulting in a change in shopping habits brought about by government restrictions and advice. This created an immediate need for additional logistics facilities to store and distribute goods currently in transit and accommodate the change in demand for e-commerce fulfilment. The pandemic also created an increased need for a supply chain to serve non-retail Covid related demand from the NHS and other support sectors. This has generated both short-term and long-term requirements within the market.

1.3. Brexit has also had a major impact on the manufacturing sector with companies needing to consider altering their supply chain structures in order to make decisions upon investment in the UK or Europe. This trend is known as re-shoring.

1.4. Increased global instability following the war between Russia and Ukraine and conflict in the Middle East has also led to companies seeking greater control of their supply chains and considering re-shoring strategies.

1.5. The resulting government increase in defence spending to 2.6% of GDP by April 2027 will also lead to an increased demand for industrial and logistics premises as manufacturing and storage of arms and munitions increases. The government have further committed to invest 5% of GDP on defence by 2035. In 2023-24, MOD spending for the North West was higher than any region outside of the South East and South West[1].

1.6. Finally, tariffs which are currently being imposed and negotiated by the US government are also leading occupiers to re-assess their supply chains. A number of Asian e-commerce/third party logistics businesses including JD.com and Top Cloud Logistics have recently taken space in the UK which could be in response to the changing global trade landscape.

1.7. The changes in the market which have resulted in the need for more warehouse space have included:

- shopping patterns have shifted with an increase in internet sales.
- home working has made home delivery more convenient.
- the increase in internet sales has also resulted in a rise in returns of unsuitable goods and therefore a need for additional space to process these returns.

[1] https://www.gov.uk/government/statistics/mod-regional-expenditure-statistics-with-industry-202324/mod-regional-expenditure-with-industry-202324#mod-expenditure-with-uk-industry-by-region

- supply chains are adapting to carry more stock to prevent future shortages for manufacturers and consumers.
- manufacturers are re-shoring elements of production to the UK to ensure that they have resilience in their network.
- diversification of production, to avoid over reliance on a single supplier, will increase manufacturing and storage requirements.
- increased manufacturing and storage of munitions in response to the UK's defence strategy, along with associated supply chain operations
- automation will place less reliance on the workforce in terms of the impact of another pandemic outbreak and availability of migrant labour post Brexit. This will increase the resilience of a business.
- The use of automation in logistics is focused on reducing repetitive and physically demanding tasks, freeing up human workers to focus on more strategic roles requiring critical thinking, problem-solving, and decision-making. While automation reduces some manual roles, it creates new technical and analytical roles focused on designing and managing systems and analysing data to identify optimisation opportunities.

1.8. The majority of the above issues are equally applicable to the impact and future proofing that companies are undertaking with regard to Brexit and increasing global instability.

1.9. The BPF report "What Warehousing Where" (2018) concluded that the average household required 69 sq ft of warehouse space for its e-commerce requirements (page 29)[2]. Based on the relationship between the current Labour government's target of 300,000 new homes per annum, this creates an increased need of 20.7m sq ft of warehousing per annum. This would generate the equivalent of 25,000 Full Time Equivalent jobs. The report acknowledges that the ratio of warehouse area to households has been increasing with the growth of e-commerce. ONS data currently measures internet sales as a percentage of total retail sales (ratio) as 27.1% (2024), compared to 18.0% in 2018, when the BPF report was published[3].

1.10. The main sectors for demand in recent years have been from e-commerce, retailers, third-party logistics providers ('3PLs') and manufacturers. Some logistics occupiers are shifting towards operating automated or part-automated facilities in taller buildings with larger floorplates to give efficient economies of scale that are necessary for the level of investment required in the handling systems.

1.11. Behind the changing demand from resulting from Covid, Brexit, geopolitical instability and tariff changes, there are the ongoing requirements from occupiers which are driven by lease events and structural changes within the business. A lease event could be an expiry or break clause. This enables the business to adapt their occupational strategy in line with their business plan and formed the basis of the property market pre-Covid 19 pandemic, however these stalled in 2019 due to the uncertainty over Brexit and then in the first half (H1) of 2020 due to Covid 19. The market recovered in the H2 of 2020 with companies focusing on both operational and strategic requirements rather than the short-term operational needs created in H1 2020.

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[2] https://bpf.org.uk/our-work/research-and-briefings/what-warehousing-where/
[3] https://www.ons.gov.uk/businessindustryandtrade/retailindustry/timeseries/j4mc/drsi

2. The Application Site and Proposed Development

2.1. The logistics sector is adapting to the current requirements of both occupiers and customers, with the primary trends set out below.

- Taller buildings – for speculatively built units of over 100,000 sq ft, clear heights of 12.5 - 18m. For build to suit solutions this could be higher depending on the use of the property.
- Larger building floorplates - these offer the economies of scale and enable centralisation of storage into regional or national distribution centres.
- Environmental Sustainability and Governance (ESG) – given the ESG demands of occupiers, investors and government policy, buildings require higher Energy Performance Certificate ratings and ideally need to be net zero carbon or carbon neutral. New buildings will incorporate various initiatives including photovoltaic panels, EV/battery charging and rainwater harvesting to satisfy these criteria.
- Power supply - warehouses will have larger power requirements to accommodate logistics operators who have growing power requirements due to increasing adoption of automation and robotics in their operations along with electrifying their vehicle fleets. A recent article from Green Street News stated that at the end of 2023, applications for 544GW worth of registered generation capacity was waiting to connect to the grid, with more than a third of these applications having a connection date in excess of 10 years[4]. Manufacturers also often have significant power requirements to accommodate their processes and equipment.

2.2. Regional/sub-regional development sites should satisfy the following criteria to enable development of Big Box distribution facilities:

- Large and regularly shaped footprint – sites should be capable of accommodating a regularly shaped building with a site density no greater than 40 – 45%. The site should allow for a 50m deep yard facing the principal elevation (or both principal elevations, if cross-docked) and separate car parking (approximate ratio of 1 parking space to 1,000 sq.ft.).
- Motorway/Strategic Road Access – the users require access to motorway junctions and the strategic road network.
- Labour Supply – access to workforce and availability of public transport.
- ESG Agenda – the ESG demands of occupiers and investors are becoming increasingly important factors within the marketplace. Stricter criteria will impact value as investors/occupiers will have to be able to offer a Net Zero Carbon building by 2050. This further demand for modern/new warehousing will have a greater impact on existing, aging and functionally obsolete buildings. Occupiers will need to relocate to more efficient and effective facilities for their own purposes or as part of a corporate or contractual requirement with an end user.

[4] https://greenstreetnews.com/article/power-crisis-form-an-orderly-queue-please/

- Power supply – sites need to have a suitable power connection to accommodate manufacturers or logistics operators.

The Subject Site

The Location

2.3. The subject site comprises a regularly shaped plot of approximately 100 acres, positioned to the north-east of Junction 3 of the M65. The site is known as Stanworth Land.

2.4. Access to the site is via the A674 which provides direct access from the motorway junction. The only access works required would be to form a new access road for the site itself.

2.5. The M65 runs from the M6 and M61 at Preston to the west, connecting several towns within East Lancashire including Blackburn, Accrington, and Burnley, before terminating at Colne.

2.6. Junction 3 of the M65 is approximately 2.9 miles from Junction 9 of the M61. The M61 runs north-south, connecting the M60 ring-road around Manchester to the south with the M6 at Preston to the north.

2.7. Junction 3 of the M65 is approximately 4.5 miles from Junction 29 of the M6, which is the longest motorway in the UK connecting central England to the Scottish borders.

2.8. A Model Logistics Study commissioned by FIREM states that "within a one hour drive time a population of over 7.6 million people can be reached and within two hours the catchment is close to 17 million (based on 2020 population estimates)."

2.9. The site also has motorway links to the deep sea and ferry port at Liverpool and the ferry port at Heysham. Liverpool has a significant port system with multiple facilities, including Royal Seaforth Container Terminal (Liverpool's main deep-water container terminal which handles approximately 45% of UK's transatlantic trade) and the Liverpool2 Deep-Water Terminal opened in 2016 and is one of the few UK ports capable of handling the world's largest container vessels. This has significantly expanded Liverpool's shipping capacity.

2.10. This site therefore satisfies the requirements of being well connected to the motorway and strategic road network, along with access to ports. A significant catchment is available within an hour's drive time.

2.11. Significant occupiers located close to the M65 corridor between Preston and Burnley include the following:

- James Hall & Co: Major SPAR distributor operating a 620,000 sq ft distribution centre at Bowland View, Preston
- Waitrose Regional Distribution Centre (RDC): 425,000 sq.ft. facility at Matrix Park, Chorley
- Booths Supermarkets: c.250,000 sq.ft. HQ and distribution centre based in Preston
- Fagan & Whalley: c.300,000 sq.ft. logistics campus at Burnley Bridge and Frontier Park
- Exertis UK: c.450,000 sq.ft. Technology distribution centre at Burnley Bridge
- BAE Systems: Major aerospace manufacturing facilities at Warton and Samlesbury (combined total of circa 870 acres)

- Crown Paints: c.150,000 sq.ft. paint manufacturing facility
- Safran Nacelles: c.300,000 sq.ft. aerospace component manufacturing facility
- VEKA UK: c.200,000 sq.ft. PVC window systems manufacturing facility
- Budweiser: c. 80 acre brewery site

The Scheme

2.12. The proposed scheme comprises two cross docked, Grade A, XL logistics units with the following floor areas:

	Unit 1		Unit 2		Total	
	sq.m	**sq.ft**	**sq.m**	**sq.ft**	**sq.m**	**sq.ft**
Warehouse	46,630	501,925	66,220	712,792	112,850	1,214,717
Offices	2,930	31,359	3,710	39,934	6,640	71,473
Total	**49,560**	**533,464**	**69,930**	**752,726**	**119,490**	**1,286,190**

Figure 2.1 Floorspace proposed by the applicant

2.13. The scheme will provide needed 'XL' big box units to the market, which has shown consistent occupier demand both regionally and nationally, with limited supply of buildings and sites which can accommodate premises of this scale.

2.14. The site offers a large and regularly shaped footprint to enable the formation of development plateaus. A power line runs across the site but generally is restricted to the southern boundary of the site, running adjacent to the M65 corridor.

2.15. We understand that FIREM have lodged an application for a 10 megawatt power supply to serve the proposed development which based on recent XL Big Box development within the North West (Link 674 Ellesmere Port – 5 MVA; X-Dock 549 Widnes - 2.4 MVA; Arc Royal Birkenhead – 1.75 MVA) would be sufficient.

2.16. We understand that on receipt of obtaining planning consent, FIREM would implement the consent and create an access, development platform and ecology area thus providing a serviced site to allow a timely delivery of premises for an occupier upon completing an Agreement for Lease.

2.17. FIREM have developed a recent Big Box unit, Botany 158, to reach EPC A and BREEAM 'Very Good' credentials, demonstrating their commitment to ESG- and sustainability-led development.

3. Planning Policy and Evidence Base Review

3.1. This section considers the relevant planning policy context for employment land in the Borough of Chorley.

National Planning Policy Framework (NPPF)

3.2. The NPPF sets out the Government's planning policies for England and how these should be applied. It provides a framework within which locally prepared plans can provide for sufficient housing, employment and other development in a sustainable manner. The NPPF was updated in December 2024 with a corrected version published in February 2025.

3.3. Paragraph 39 of the NPPF states that Local Authorities should approach planning decisions in a positive and creative way. They should secure development that improves the economic, social and environmental conditions of the area. Local Authorities should approve applications for sustainable development wherever possible.

3.4. The economic objective in achieving sustainable development is considered in greater detail in Paragraph 8 of the NPPF. It refers to establishing a strong responsive and competitive economy through ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity to support growth and innovation.

3.5. Section 6 of the NPPF sets outs the policies for "Building a strong, competitive economy", it states at Paragraph 85 that:

> *"Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt.* ***Significant weight should be placed on the need to support economic growth and productivity****, taking into account both local business needs and wider opportunities for development. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation, and in areas with high levels of productivity, which should be able to capitalise on their performance and potential.." [Our emphasis].*

3.6. Paragraph 86 highlights the growing importance of the logistics sector, stating that:

> *"Planning policies should … pay particular regard to facilitating development to meet the needs of a* ***modern economy****, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure,* ***freight and logistics****." [our emphasis]*

3.7. It is further stated in Paragraph 87 that: -

> *"Planning policies and decisions should recognise and address the specific locational requirements of different sectors. This includes making provision for.....* ***storage and distribution operations at a variety of scales and in suitably accessible locations that allow for the efficient and reliable handling of goods****." [Our emphasis].*

The Development Plan

3.8. The adopted development Plan comprises the following documents:

- Central Lancashire Core Strategy (adopted 2012)

- The Chorley Local Plan 2012 to 2026 (adopted 2015)
- Joint Lancashire Minerals and Waste Local Plan

Central Lancashire Core Strategy

3.9. The Core Strategy is a key document in Central Lancashire's Local Development Framework. Its purpose is to help co-ordinate development in the area and contribute to boosting investment and employment. The Core Strategy addresses the shared housing, employment and retail markets of Preston, Chorley and South Ribble.

3.10. Strategic Objective 10 the Core Strategy states that the Plan will ensure there is a sufficient range of locations available for employment purposes. To achieve this Objective, Policy 9 states that 454 hectares of land for employment development between 2010 and 2026 will be identified and goes on to identify a number strategic sites to deliver employment development.

Chorley Local Plan

3.11. The Chorley Local Plan 2012 to 2026 sets out how planning applications should be decided, and identifies areas for development and areas which should be protected from development.

3.12. The Chorley Local Plan flows from the Core Strategy and Policy EP1 identifies 88.74 hectares of employment land allocations. These allocations account for around 19.5% of the land identified as being required in Policy 9 of the Core Strategy.

3.13. Of the 88.74 hectares identified, just over 53 hectares is identified by the Policy as being suitable for B8 use, alongside B1 and B2 use.

Emerging Draft Development Plan

3.14. A new Central Lancashire Local Plan (CLLP) for the 3 authorities of Chorley, Preston and South Ribble is being prepared to cover the period to 2041. The consultation (Regulation 19) ran from 24 February until 14 April 2025. The emerging plan was submitted for Examination on 4th July 2025 (Regulation 22); no date has been set yet for the hearings.

3.15. Draft Policy EC1 states that provision will be made for a **minimum** of 173 hectares of employment land to support both local and wider strategic employment needs. The policy sets out the objectively assessed need across the plan area, which for Chorley equates to 34.97 hectares of land for industrial and warehouse development.

3.16. Policies EC2 to EC6 identify the employment land allocations across the three boroughs.

Evidence Base Review

3.17. To inform the Local Plan review process, the Central Lancashire authorities have prepared a detailed evidence base. Of relevance to this proposal are:

- Employment Land Study Update (2022)
- Central Lancashire Employment Land Study - Land Supply and OAN Update 2024

Employment Land Study Update (2022)

3.18. The study was commissioned to provide an up to date and proportionate 'Update' of the Central Lancashire Employment Land Study, produced in 2017 by BE Group. The Update reviews the

Conclusions and Recommendations of the 2017 Study and seeks to identify the scale, location and type of demand for employment land and property in Central Lancashire over the study period.

3.19. The Study concludes that the overall Current Realistic Land Supply is around 191 hectares for the Central Lancashire sub-region. In relation to the OAN, the Study recommends that historic take-up is used as the main measure of Central Lancashire's future land need. The Study goes on to conclude that local land supply of 190.78 ha is sufficient to meet needs in Preston, but not in Chorley and South Ribble. The Study identifies that overall, Chorley requires a further 20ha and South Ribble requires a further 25.7ha.

3.20. The Study also breaks down the requirement by use class within Table 43, which identifies that the need for additional B8 development is just over 21 ha. This figure is greater than the quoted 20 ha required because the study takes an amalgamated approach to employment land, meaning that it is assumed that an over-supply of Class E(g)iii industrial floorspace can simply be transferred to logistics floorspace. This approach does not consider whether the specific requirements for logistics could be accommodated on the identified industrial land. Further commentary is provided on this below.

Central Lancashire Employment Land Study - Update 2024

3.21. Provides an update to the 2022 Study, which 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 OAN exercise to reflect a different forecast period for the emerging CLLP, 2023-2041, changing economic conditions, updated forecast methodologies and the latest population projections for Central Lancashire.

3.22. The 2024 Study updates the OAN for industrial and warehouse development, concluding that the need reduces from the 76.34 ha identified in the 2022 Study to just 34.97 ha by 2024, which the report concludes, is sufficient to meet the economic need for Chorley in the plan period.

JLL Commentary

3.23. A detailed review and assessment of the Employment Land Studies has been prepared by Iceni Projects Ltd. As such, a detailed review is not provided in this report. However, the Iceni report concludes that the Council's employment land evidence base significant under-estimates the land needed to meet the needs of the strategic logistics sector.

3.24. However, while the employment land studies consider B8 use, there is no consideration of the varying requirements within the use class. Specifically, the Studies do not consider the requirements around the big-box logistics sector (i.e. with floor space above 9,000 sq.m).

3.25. The big-box logistics sector has a number of market-driven and physical site requirements which need to be present, which are set out in Section 2 of this report. The key requirements that need to be considered are:

- Large and regularly shaped footprint.
- Motorway/Strategic Road Access
- Labour Supply
- ESG Agenda

- Power supply

3.26. Accordingly, JLL consider that the Central Lancashire Employment Land Studies do not fully consider the requirements for big box logistics development and as such, are likely to over-estimate the ability of the available land supply to meet the OAN.

UK Industrial Strategy

3.27. On 23 June 2025 the UK Government published The UK's Modern Industrial Strategy[5], which sets out the Industrial Strategy, the 10-year plan to significantly increase business investment in 8 growth-driving sectors, by making it quicker and easier for businesses to invest and providing them with the certainty and stability needed for long-term investment decisions.

3.28. With the aim of significantly boosting economic output, the Strategy focuses on eight sectors with the highest potential, and the frontier industries at their leading edge – and targeting the places and clusters across the UK that support those sectors.

3.29. The Strategy identifies ten areas where the government will focus intervention to help deliver growth. These are[6]:

I. Tackle high industrial energy costs
II. Promote free and fair trade
III. Strengthen economic security
IV. Expand access to finance
V. Drive innovation
VI. Capitalise on the value of UK data
VII. Enhance skills and access to talent
VIII. Reduce regulatory burdens and speed innovation
IX. Remove planning barriers
X. Ensure the tax system supports growth.

3.30. The most relevant of the interventions here, is to remove planning barriers. In this regard the Strategy states that policy uncertainty and the planning system have acted as blockers to growth, resulting in slow delivery and a perception amongst investors that the UK is a place where it is hard to build[7].

3.31. The Strategy highlights the impact of the revisions to the NPPF already in place and states that these benefits will be built upon through a consultation later this year on a set of national planning policies to guide planning decisions.

3.32. The key interventions identified in the Strategy are:

[5] https://www.gov.uk/government/publications/industrial-strategy
[6] Page 12
[7] Page 80

- Reducing the average preapplication period for major infrastructure projects from two years to 12 months by scrapping overly burdensome consultation requirements.
- Launching a Call for Evidence on the expansion of permitted development rights to support specific building works.
- Make timely planning decisions, with a 13-week target for decisions made by Ministers on called-in applications.
- Improve the responsiveness of Local Planning Authorities (LPAs) by providing funding for 300 new planning officers and offering new flexibilities for planning application fees to be set locally so they cover the costs of the service. The government are also accelerating digitalisation to encourage the development and adoption of the next generation of planning services. The government are with LPAs to co-create user-friendly planning application software to speed up planning decisions. This includes PlanX services, which have reduced both application inaccuracies and the number of planning-related calls by up to 60%.

3.33. The eight sectors the Government proposes to focus interventions to drive growth, known as the IS-8 are:

I. Advanced manufacturing
II. Creative industries
III. Life sciences
IV. Clean energy
V. Defence
VI. Digital technologies
VII. Professional and business services
VIII. Financial services

3.34. While the logistics sector is not identified as one of the IS-8 sectors, the Strategy recognises the importance of Logistics in supporting growth across a number of the IS-8 sectors. The Strategy dedicates a section to Freight and Logistics, commenting that:

> *"The freight and logistics sector makes a vital contribution to the UK economy and the competitiveness of the IS-8, ensuring that the right goods are in the right place at the right time. With 76% of logistics employees based outside London and the South East, the sector supports local economies and job creation across all four nations, with major hubs in the Midlands and the central belt of Scotland. In 2023, it contributed approximately £79.8 billion in GVA.60 Oxford Economics have estimated that in 2019 every pound of output from the freight and logistics sector generated £2 of spending elsewhere in the economy, through supply chains and employee spending – one of the highest economic footprints of any UK sector.61 They have also estimated that productivity growth could be boosted by 20% if the UK were to become a global leader in the sector."*[8]

3.35. The section concludes by stating that the government will work closely with industry and deliver a new plan for freight and logistics later this year so that the sector can continue to play its part in growing the economy.

[8] Page 89

4. Market Overview, Demand Profile & Land Supply

4.1. The national industrial and logistics market had an extremely high level of take up during 2020-2022. The market has since reverted to pre-Covid levels of take up from 2023 onwards, still representing strong occupier demand.

National Grade A Big Box Take Up

Year	Take Up (sq ft)
2024	22,600,000
2023	21,400,000
‘Covid’ Average (2020 – 2022)	35,412,993
Long Term Average (2015 – 2024)	25,321,849
‘Pre-Covid' Average (2014 – 2019)	21,200,000

Figure 4.1 National Grade A Bix Box take up

4.2. 74% of take up in 2024 comprised new build premises, with the remainder being second-hand premises (including ‘grey’ space, taken up by way of assignment or subleases from occupiers). 56% of the new space taken up involved Built to Suit units with the remainder in speculative buildings (either built and immediately available or under construction).

4.3. Manufacturing was the dominant sector in 2024, with approximately 35% market share. This was above the historic trend for this sector where over the previous 5 years (2019-2023), take up by manufacturers accounted on average for circa 14% of take up. [9]

[9] https://www.jll.com/en-uk/insights/market-dynamics/uk-big-box

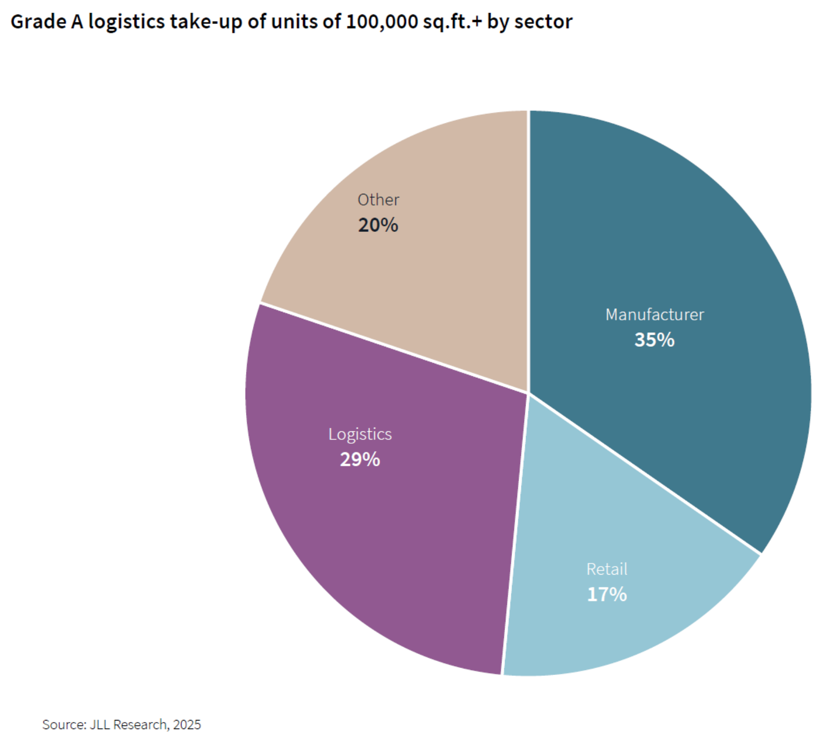

Figure 4.2 Grade A logistics take up by sector

4.4. JLL in-house data registered take up in H1 2025 of 12.7m sq.ft. (up from 9.6m sq.ft. in H2 2024), which includes the Agratas gigafactory in Bridgewater (2.6m sq.ft.) which recently received planning consent. Excluding this transaction, take up was 10.1m sq.ft. which was still an increase compared to H2 2024. Approximately 40% of this take up was from logistics occupiers, followed by manufacturers who took circa 34% (including Agratas) At the end of H1 2025, approximately 10m sq.ft. of Grade A Big Box units were under offer.

4.5. New take-up comprised 31 units, of which 20 were speculative and 11 were new build to suit. New speculative take-up in H1 2025 was a marked increase on the comparable half yearly periods over the previous two years (2023-2024). Approximately 4.7 million sq ft of new speculative floorspace was taken up in H1 - this was 33% higher than H2 2024 and it was 47% high than the half yearly average over the last two years (H1 2023-H2 2024).

National Supply

4.6. At the end of the first half of 2025 headline total available supply stood at 45.0 million sq.ft. with an additional 5.4 million sq.ft. was available in ‘grey space’ by way of assignment or subleases. The headline level of supply was 5% up on the end of 2024 and 14% higher than a year ago.

4.7. Around 51% of the available space was in completed new speculative buildings, with speculative developments under construction accounting for another 18%. The remaining 31% was in existing secondhand buildings.

4.8. JLL’s breakdown of the Grade A big box supply at the end of 2024 by floor area is summarised below:

Size range (sq ft)	Total Floor Area (sq ft)
100,000 - 249,999	22,101,344
250,000 – 499,000	17,279,564
500,000 +	5,571,078
Total	**44,951,986**

Figure 4.3 big box supply by floor area

4.9. Approximately 44% of this supply was available in new completed speculative developments, with an additional 29% either under construction speculatively and the remaining 27% in existing second-hand buildings. Of this total supply, approximately 12.7% was in the North West.[10]

4.10. In summary:

- Grade A take up in 2024 was 22.6 million sq ft – broadly in line with the ‘pre-Covid’ average and up on 2023 (21.4 million sq.ft.).
- Grade A take up in H1 2025 was 12.7m sq ft, which represented an increase on H2 2024 (9.6m sq ft)
- Supply at the end of Q1 2025 was 43.9 million sq ft.

4.11. At the end of H1 2025, approximately 12% of the supply was in units of 500,000 sq.ft. and above. The North West had approximately 12% of the national supply and accounted for approximately 14.3% of national take up in 2024.

[10] https://www.jll.com/en-uk/insights/market-dynamics/uk-big-box

5. North West Market Overview

5.1. The North West market is an attractive location for the industrial and logistics sector. The region has excellent motorway access, demographics and catchment population to distribute to and provide a workforce.

5.2. The effective market area is from Crewe in the south to Carlisle in the north, and from the west coast to the Pennines. The area includes the major conurbations of the North West and the principal motorway corridors.

5.3. The North West includes a number of big box schemes which have performed well and attracted major occupiers. Examples include:

- Omega, Warrington – adjacent to J8 M62. occupiers include City Plumbing (800,000 sq ft), Amazon (778,000 sq ft in 3 units), TJ Morris (878,000 sq ft), Asda (500,000 sq ft), The Hut Group (640,000 sq ft), Iceland (505,000 sq ft) and Royal Mail (325,000 sq ft).
- Logistics North, Bolton – adjacent to J4 M61. occupiers include Aldi (440,000 sq ft), Amazon (507,000 sq ft in 2 units) DSG (375,000 sq ft) and Whistl (225,000 sq ft).
- Kingsway Business Park, Rochdale – adjacent to J21 M62 – occupiers include JD Sports (616,000 sq ft), Danish Crown (328,000 sq ft) and Asda Wincanton (493,000 sq ft)
- Icon, Manchester Airport – adjacent to J6 M56 - occupiers include Amazon (270,000 sq ft) The Hut Group (700,000 sq ft in 4 units), Alpha LSG (103,000 sq ft)
- PLP Crewe – occupiers include TK Maxx (460,000 sq ft) and Likewize (135,000 sq ft)
- Panattoni Park Crewe – occupiers include AO (305,000 sq ft) and NWF (240,000 sq ft)
- Frontier Park, Blackburn – occupiers include Fagan & Whalley (208,000 sq ft) and MDA (185,000 sq ft)

5.4. Covid-19, Brexit and global instability have been major disruptors as outlined in the national overview above. The North West market has similarly been affected.

5.5. The North West regional market can be broadly defined along the main motorway corridors/conurbations:

- M6 Crewe to Preston
- M62 Liverpool to Manchester
- M60 Manchester Orbital motorway – Greater Manchester

North West Take Up

5.6. As seen with the national market, the regional market had elevated Grade A take-up during 2020 to 2022, which again has since reverted in line with the long-term average as shown below:

Year	Total Sq ft (Grade A)	Proportion above 500,000 sq ft
2024	2,716,757 (12 transactions)	674,264 (1 transaction)
2023	2,446,211 (8 transactions)	1,336,700 (2 transactions)
2022	6,875,250 (19 transactions)	4,261,914 (8 transactions)
2021	3,985,077 (16 transactions)	650,000 (1 transaction)
2020	3,236,000 (15 transactions)	525,000 (1 transaction)
Long Term Average (2015 – 2024)	**2,900,000**	

Figure 5.1 Post Covid Big Box take-up in the North West

5.7. At the end of H1 2025, we are aware of 6 Grade A big box transactions in the North West which have completed or entered into an Agreement for Lease, totalling 838,708sq.ft. We are also aware of a further 6 transactions which are under offer, equating to a further circa 1,162,577 sq.ft.

5.8. There has been a dominance of transactions to retailers in the region, mainly associated with e-commerce activity. Transactions since 2020 have included:

Year	Size (sq.ft.)	Unit	Occupier
2024	674,000	Link Logistics Park, Ellesmere Port	B&M
2023	460,000	PLP Crewe	TK Maxx
	149,000	Magnitude, Middlewich	Jet2
2022	878,000	Omega Warrington	Home Bargains
	544,000	Connect6, Farington	Victorian Plumbing
	505,000	Omega Warrington	Iceland
	197,000	Metro 190, Trafford Park	PerScent
	225,000	Omega Warrington	Amazon
	244,000	Super W, Warrington	Farmfoods
2021	835,700	PLP Knowsley	Amazon

Year	Size (sq.ft.)	Unit	Occupier
	305,000	Panattoni Park Crewe	AO.com
	216,777	Kingsway Business Park, Rochdale	Amazon
	149,300	Logistics North, Bolton	Amazon
	217,000	Venus 217, Knowsley	Amazon
2020	597,000	Icon, Manchester Airport	The Hut Group
	376,000	Logistics North, Bolton	Dixons Retail Group
	308,800	Omega Warrington	Gousto

Figure 5.2 Bix box transactions in the North West

5.9. Since January 2020 there has been 73 occupational transactions (lettings/sales) in the North West of Grade A units over 100,000 sq ft. Of these, the following 6 transactions were within Lancashire:

Date	Property	Size (sq.ft.)	Occupier
Q3 2024	Unit 8, Aptus, Preston	145,000 Land sale for self-build	Tilemaster Adhesives
Q2 2024	FP2, Frontier Park, Burnley	157,540 New build	Stolle Machinery
Q4 2023	Unit F/G, Botany Bay, Chorley	110,000 New build	James Donaldson Timber
Q4 2022	Connect6, Farrington	544,000 New build	Victorian Plumbing
Q2 2021	Frontier Park, Blackburn	208,000 New build	Fagan & Whalley
Q1 2021	Frontier Park, Blackburn	160,000 New build	Science in Sport
		Total: 1,324,540	

Figure 5.3 Big Box Lettings in Lancashire

North West Supply

5.10. The availability within the North West of existing Grade A Big Box speculative build and units under construction is currently 6,146,099 sq ft. which equates to 2.1 years' supply, based on the 10 year average. This includes the circa 1.4m sq.ft. which is under offer.

5.11. Of this supply, 3,370,275 sq.ft. is in units under 300,000 sq.ft. There are only three units of 400,000 sq.ft and above, and only one unit greater than 500,000 sq.ft.

5.12. The following table outlines the current supply of 300,000 sq.ft. and above.

Unit	Specification	Sq ft
Widnes X-Dock, Widnes	Grade A New Build	551,693
Arc Royal, Birkenhead	Grade A New Build	495,034
Omega 420, St Helens	Grade A New Build	420,872
Crewe335, Crewe	Grade A New Build	335,000
OXW 333, Trafford Park	Modern Second Hand	333,562
Bolton 330, Bolton	Grade A New Build	330,000
Omega Loop, Warrington	Grade A New Build	309,663
Total		**2,775,824**

Figure 5.4 current big box supply in the north west

Lancashire Supply

5.13. The supply of completed Grade A units over 100,000 sq.ft. in Lancashire is limited to three buildings, as outlined below.

Unit	Sq Ft	Availability	Comment
Revolution 185, Chorley	185,191	Available immediately	Modern second hand unit. Marketed as tenant's space – available by way of assignment or sub-letting.
Botany 158	158,360	Available immediately.	Grade A new build
FP3, Frontier Park, Burnley	157,071	Due to reach practical completion in Q3 2025	Grade A new build.
Total		**500,622**	

Figure 5.5 current big box supply in Lancashire

Summary

5.14. In summary:

- Grade A take up in 2024 was 2,716,757 sq.ft., approximately 11% up on 2023.
- Supply at the time of writing was 6,146,099 sq ft which equates to 2.1 years' supply. However, 3,370,275 sq.ft. is in units under 300,000 sq.ft. There are only three units of 400,000 sq.ft

and above and only one unit greater than 500,000 sq.ft. currently available (built) or under construction.

- Lancashire has only three Grade A Big Box units available, the largest of which is 185,181 sq.ft.

6. 'XL' Logistics Units

6.1. For the purpose of this report, 'XL' big box units refers to units of 500,000 sq.ft. and above.

6.2. Premises with larger floorplates offer economies of scale which are necessary for the level of investment required in the handling systems and enable centralisation of storage into regional or national distribution centres.

6.3. Such premises also offer a greater volume of space, which occupiers who are considering stockpiling and re-shoring in order to provide greater control of their supply chain in response to global and trading instability will require.

6.4. As a result, some developers are speculatively delivering larger buildings. For example, Panattoni have recently started construction of a single unit of 915,000 sq ft in Swindon which is reported to be the UK's largest ever speculatively built logistics unit[11]. This follows their letting in Q2 2025 of 884,000 sq ft at Panattoni Park Avonmouth to GXO.

6.5. In addition, Panattoni and Barings are also developing a unit of 770,000 sq ft at Central A1(M), South Yorkshire which is understood to be the largest ever speculative logistics unit in the North of England[12].

National XL Big Box Take Up

6.6. Take up of Grade A XL units nationally over the past 5 years has equated to the following:

Year	Total Grade A Take Up (100,000 sq.ft.+)	Grade A Take Up (XL - 500,000 sq.ft. +)	Number of XL Transactions	XL Transactions as proportion of total Big Box Take Up
2024	22,563,512	7,332,199 .	9	32.5%
2023	21,370,733	6,968,355 .	8	32.6%
2022	32,893,854	12,340,027	17	37.5%
2021	37,552,794	13,024,241	16	34.7%
2020	35,792,288	17,652,003	16	49.3%

Figure 6.1 National take up of Grade A XL units

6.7. The above statistics show sustained demand for XL premises during both the years of exceptional take up between 2020 – 2022 and during periods of more consistent take up since the market has reverted to pre-Covid 19 levels.

6.8. Take up of XL buildings nationally in 2024 was as follows:

[11] https://panattoni.co.uk/panattoni-breaks-ground-on-the-uks-largest-ever-speculative-logistics-facility-in-swindon/
[12] https://panattoni.co.uk/panattoni-supersizes-with-largest-ever-speculative-logistics-development-in-the-north-of-england/

Date	Location	Size	Occupier	Sector	Transaction Type
Q1 2024	Segro Logistics Park, Northampton	1,191,000	Yusen Logistics	Logistics	Build to Suit
Q2 2024	Magna Park, Corby	1,315,273	Nike	Logistics. Campus style development	Build to Suit
Q2 2024	Symmetry Park, Oxford	604,000	Siemens Healthineers	R&D / Manufacturing	Build to Suit
Q2 2024	Magna Park, Corby	587,662	Bleckmann	Logistics	Speculative Build
Q2 2024	Orwell Logistics Park, Felixstowe	500,000	EDF	Linked to Sizewell C	Build to Suit
Q3 2024	Orwell Logistics Park, Felixstowe	500,000	EDF	Linked to Sizewell C	Build to Suit
Q3 2024	Link Logistics Park, Ellesmere Port	674,264	B&M Stores	Retail	Speculative Build
Q4 2024	Zone B, Peddimore Industrial Estate, Birmingham	c.1,000,000	Rockwool	Manufacturing	Acquired for self-build
Q4 2024	Symmetry Park, Kettering	960,000	Amazon	Logistics	Build to Suit

Figure 6.2 National take up of XL buildings

6.9. We are aware of the following XL transactions during 2025 (year to date):

Date	Location	Size	Occupier	Sector	Transaction Type
Q2 2025	Panattoni Park, Avonmouth	884,000	GXO	Logistics	Speculative Build
Q2 2025	Sherburn 550, Sherburn	556,000	ID Logistics	Logistics	Refurbished Existing Building

Figure 6.3 XL transactions during 2025

6.10. We are also aware of two transactions, each of circa 1m sq.ft., which are currently under offer.

National XL Supply

6.11. At the end of H1 2025, the supply of XL big box units nationally equates to 5,573,116 sq.ft. across 8 buildings and is broken down as follows. This equates to circa 9.5 months' supply, based on average take up of c. 7.15m sq.ft. for 2023 and 2024.

Unit	Region	Size (sq.ft.)	Availability
Former Wilko, Europark	Wales	937,000	Modern secondhand unit. Available immediately. Understood to be under offer.
Panattoni Park, Swindon	South West	916,984	Under construction
Panattoni 770, Central A1 (M)	Yorkshire	768,800	Under construction
MPN761, Magna Park North, Magna Park Lutterworth	East Midlands	761,361	Under construction
Matrix 586	Bristol	584,361	Under construction
X-Dock 549, Widnes	North West	551,693	Grade A new build
Panattoni Park, Swindon	South West	545,414	Under construction
Derby 507, Infinity Park Derby, Infinity Park Way	East Midlands	507,503	Grade A new build
	Total: 5,573,116 sq.ft.		

Figure 6.4 National XL Supply

North West XL Take Up

6.12. Take up of Grade A XL units in the North West over the past 5 years has equated to the following:

Year	Total Grade A Take Up (100,000 sq.ft.+)	Grade A Take Up (XL - 500,000 sq.ft. +)	Number of XL Transactions	XL Transactions as proportional of total North West Big Box Take Up
2024	2,716,757	674,264	1	24.8%

Year	Total Grade A Take Up (100,000 sq.ft.+)	Grade A Take Up (XL - 500,000 sq.ft. +)	Number of XL Transactions	XL Transactions as proportional of total North West Big Box Take Up
2023	2,446,211	1,336,700	2	54.6%
2022	6,875,250	4,261,914	6	62%
2021	3,985,077	650,000	1	16.3%
2020	3,236,000	525,000	1	16.2%

Figure 6.5 North West XL Take up

6.13. The above take up is broken down as follows:

Date	Location	Size	Occupier	Sector	Transaction Type
Q3 2024	Link Logistics Park, Ellesmere Port	674,264	B&M Stores	Retail	Speculative Build
Q4 2023	Longtown, Cumbria	807,300	Ministry of Defence	Defence	Land acquired for self-build
Q3 2023	Ash Road, Elton	529,400	Encirc Glass	Manufacturing	Land acquired for self-build
Q4 2022	Connect6, Farington	544,000	Victorian Plumbing	Retail	Speculative Build
Q2 2022	Plots G1 & G2, Logistics North, Bolton	967,729	Lidl	Retail	Land acquired for self-build
Q2 2022	Hooton Business Park, Ellesmere Port	667,185	Stellantis	Automotive	Build to Suit
Q1 2022	Omega West, Warrington	505,000	Iceland	Retail	Build to Suit
Q1 2022	The Airfields, Deeside	700,000	ICT	Manufacturing	Land acquired for self-build

Date	Location	Size	Occupier	Sector	Transaction Type
Q1 2022	Omega West, Warrington	878,000	TJ Morris	Retail	Land acquired for self-build
Q1 2021	PLP Knowsley	650,000	Amazon	Logistics	Build to Suit
Q1 2020	Haydock 525	525,000	Kelloggs	Retail	Speculative Build

Figure 6.6 Detailed North West XL Take Up

6.14. These transactions evidence that demand for XL Big Boxes is not localised to a particular sector. The differing uses (retail, defence, manufacturing, automotive and logistics), highlight the variety of occupiers who can require premises of this scale.

North West Supply (existing)

6.15. There is currently only one Grade A XL unit in the North West, which is X-Dock, Widnes (551,693 sq.ft.) which is available and reached practical completion in Q1 2025.

6.16. Whilst not technically an XL box, Arc Royal, Birkenhead (495,034 sq.ft.) is also available and reached practical completion in Q1 2025.

6.17. We understand that both buildings have good interest.

North West Development Pipeline Supply (Detailed Consent)

6.18. The table below shows the only two units in North West England that have a reserved matters / detailed planning consent for single units of 500,000 sq.ft. or above. These sites could potentially be brought forward for development within the next 12 months, subject to market conditions.

Address	Developer / Fund	Size (sq ft)
H Park Heywood South	Russells	688,000
Stealth 525 Deeside	Marshall	525,000

Figure 6.7 North West Development Pipeline

Lancashire Sites

6.19. Stanworth is able to accommodate two Grade A XL logistics units of 533,464 sq.ft. and 752,727 sq.ft. respectively.

6.20. There are a lack of sites within Lancashire which can accommodate XL premises, particularly those of 650,000 sq.ft. or above, as set out below.

Lancashire		
Site	**Location**	**Comment**
G-Park, Skelmersdale	M58, Junction 4	42 acre site; cannot accommodate more than 260,000 sq.ft. in a single building.[13]
Preston East	M6, Junction 31a	65 acre site which could accommodate 637,000 sq.ft. in a single building. Access from the M6 is only possible driving northbound due to the restricted motorway junction.
Salmesbury Enterprise Zone	M6, Junction 31	120 acre site, focused on advanced manufacturing and R&D. The marketing website references units from 2,500 – 350,000 sq.ft.[14] We understand that the planning consent is only for B2.
Cuerdale Garden Village	M6, Junction 31	Mixed use site, with the largest parcel earmarked for industrial and logistics being c.41.14 acres. The illustrative masterplan shows the largest unit being 298,698 sq.ft.
Lancashire Central	M6, Junction 29	160 acre site being offered on a Build to Suit basis with outline consent which includes a single cross docked unit of 600,000 sq.ft. The plot could also accommodate a single sided unit of 670,000 sq.ft.
Botany Bay, Chorley	M61, Junction 8	21 acre site, largely developed. The largest unit is 158,000 sq.ft. [15]
Aptus, Preston	M6, Junction 31a	65 acre site with consent for up to 800,000 sq.ft. across multiple buildings. The largest unit that can be accommodated is c.500,000 sq.ft.
Prime Point, Blackburn	M65, Junction 4	Phase 2 has detailed planning consent for two units totalling circa 220,000 sq.ft.[16]

Figure 6.8 Lancashire XL Site Review

[13] https://eu.glp.com/property/g-park-skelmersdale/
[14] https://samlesburyez.com/samlesbury-enterprise-zone/opportunities/
[15] https://www.botanybaybusinesspark.com/botany-158
[16] https://www.placenorthwest.co.uk/plans-in-for-prime-point-phase-two/

North Manchester & Rochdale		
Site	**Location**	**Comment**
Kingsway Business Park, Rochdale	M62, Junction 21	420 acre site, approximately 76% developed. The largest unit that can now be accommodated would be circa 200,000 sq.ft. [17]
H-Park	M66 Junction 3	120 acre site offering build to suit opportunities. The largest unit shown on the masterplan is a cross-docked unit of 688,000 sq.ft.
Heywood Distribution Park	M66, Junction 3	200 acre site which is largely built out. Marketing literature shows a single sided unit of 627,710 sq.ft. on plot H2.[18] A reserved matters application for a single sided unit of 498,000 sq.ft. along with 3.16 acres of open storage was submitted in June 2025.[19]
Heywood Stores	M62, Junction 19	28 acre site with outline consent for 465,000 sq.ft. Understood to be developed in 3 units (51,623 sq/ft., 47,468 sq.ft. and 381,378 sq.ft.) [20]
Northern Gateway	M66, Junction 4 / M62 Junction 18	1,600 acre site which could ultimately accommodate 16m sq.ft. of employment space. Infrastructure required. Application for outline consent submitted.
Maro Development site, Northern Gateway	M66, Junction 4 / M62 Junction 18	127 acre site, irregularly shaped. Allocated for employment uses. No planning. [21]
Meridian6, Wigan	M6, Junction 24	40 acre site with outline consent for up to 625,000 sq.ft. The marketing brochure references the largest single unit being 500,000 sq.ft. (cross docked).[22]
PLP, Astley	A580	31 acre site, currently being developed into c.356,000 sq.ft. across 4 buildings.
Symmetry Park Wigan	M6, Junction 25	134 acre site with detailed consent for two units (190,000 and 110,000 sq.ft.) and outline

[17] https://s3-eu-west-1.amazonaws.com/agents-society-assets-files/87c98b4958931bb5f2804fb47c0b164d-kingswaybrochurejune2024.pdf
[18] https://heywooddistributionpark.co.uk/wp-content/uploads/2017/09/Heywood-Distribution-Park-Brochure-H3H4-8pp-Sep-2022.pdf
[19] https://publicaccess.rochdale.gov.uk/online-applications/applicationDetails.do?activeTab=externalDocuments&keyVal=SXACOHNBHQR00
[20] https://www.trammellcrow.com/newsroom/trammell-crow-company-secures-planning-permission-to-deliver-greater-manchester-logistics-scheme
[21] https://nolanredshawcrm.agencypilot.com/crm/store/documents/other/24164_6806w2604s3uac91.pdf
[22] https://meridian6wigan.co.uk/wp-content/uploads/2025/02/GeraldEve_Meridian6_Brochure_v4.pdf

North Manchester & Rochdale		
		consent for a further 1.142m sq.ft. The masterplan shows the largest unit being 501,550 sq.ft. [23]
Wingates, Bolton	M61, Junction 6	82 acre site being delivered in 3 phases. Reserved matters for Phase 1 to be submitted in July 2025. The masterplan shows a largest unit of 525,000 sq.ft. which will form part of Phase 2.
Arrow Point, Bolton	M61, Junction 6	17 acre site with consent for two units totalling circa 310,000 sq.ft.[24]

Figure 6.9 North Manchester & Rochdale XL Site Review

6.21. In summary, of the 8 sites within Lancashire on which we are aware that Big Box development is proposed or has a planning consent, only two of these sites can accommodate an XL Big Box unit.

6.22. Of these 2 sites, Preston East is limited by the restricted motorway junction, meaning that the site can only be directly accessed from the M6 when travelling northbound.

North West Requirements

6.23. JLL log and track all Industrial & Logistics requirements in the market. Since the start of 2024, JLL have recorded 33 requirements which would either consider a building of 500,000 sq.ft. or larger or a substantial site for Build to Suit or Self-Build premises, and which include Lancashire in the search area. We have summarised these requirements below.

6.24. Larger requirements may consider wider geographical areas due to the limited number of suitable sites and buildings that are available.

6.25. It is worth noting that some requirements are as a result of an occupier bidding for contract work, and so multiple requirements may be for multiple occupiers chasing a single contract.

Date	Party	Size	Comment
June 2025	c/o Savills	c.500,000	Not circulated. Likely Build to Suit (BTS).
June 2025	c/o Louch Shacklock	400,000 – 550,000 sq.ft.	Leasehold. Occupation by the end of Q1 2026. 5 year break required.
May 2025	c/o Louch Shacklock	300,000 – 500,000 sq.ft.	Leasehold. Flexible terms required and budget driven (max. £7.00 per sq.ft.).
May 2025	c/o CBRE	600,000 – 1,000,000 sq.ft.	Leasehold. Will consider existing buildings and sites (presume BTS) with outline consent

[23] https://www.tritaxbigbox.co.uk/our-spaces/wigan/
[24] https://www.placenorthwest.co.uk/bolton-approves-redevelopment-of-17-acre-former-essity-site/

Date	Party	Size	Comment
April 2025	c/o Savills	250,000 – 500,000	Leasehold. Existing buildings only, 3-5 year term.
April 2025	c/o CBRE	350,000 – 550,000	Leasehold / freehold. Will consider existing buildings or BTS opportunities.
April 2025	c/o Littler & Co	300,000 – 500,000	Freehold only. Manufacturer who requires large power supply.
March 2025	c/o BC Real Estate	150,000 – 700,000	Not formally circulated. Looking for second hand freehold options.
March 2025	c/o CBRE	300,000 – 500,000	Leasehold. Preference for 20-acre plot. Existing or BTS opportunities.
December 2024	c/o ACRE	400,000 – 600,000	Leasehold. Will consider land, existing buildings or BTS opportunities.
November 2024	c/o Knight Frank	400,000 – 500,000	Leasehold. Likely existing buildings only.
November 2024	c/o Louch Shacklock	550,000 – 650,000	Leasehold. Max 5 year term certain. Existing buildings only.
November 2024	c/o BNP Paribas	400,000 – 800,000	Freehold. Will consider existing or BTS.
October 2024	c/o CBRE	18 – 44 acres	Freehold / leasehold. Land purchase or may consider BTS.
October 2024	c/o BNP Paribas	500,000 – 700,000	Leasehold. Occupation by the end of Q1 2025.
September 2024	c/o Fisher German	25-35 acres	Land purchase only for self-build. Operational H1 2027. Require minimum 20 MVA power.
September 2024	c/o Newmark	400,000 – 800,000	Leasehold. Existing only – operational by July 2025. 3-5 year term.
September 2024	c/o JLL	400,000 – 1,000,000	Leasehold. Occupation Q1 2025. 3-5 year term.
September 2024	c/o Carter Jonas	430,000 – 860,000	Leasehold. Occupation April 2025.
August 2024	c/o BNP Paribas	600,000 – 800,000	Leasehold. Preference for 700,000 – 800,000 sq.ft. Target occupation early 2025.

Date	Party	Size	Comment
August 2024	c/o Knight Frank	18 – 24 acres	Leasehold / freehold. Land purchase for self-build; vehicle preparation centre.
July 2024	c/o 3PL Real Estate	40 – 50 acres	Leasehold / freehold. Feasibility search for 3PL occupier, need to accommodate up to 1m sq.ft.
July 2024	c/o JLL	500,000 – 700,000 sq.ft.	Leasehold. Short term – 3 years from Q1 2025. Preference for fitted and racked. Could split into multiple units but not smaller than 200,000 sq.ft.
June 2024	c/o CBRE	450,000 – 900,000 sq.ft.	Leasehold / freehold. Will look at land (30 acres +), existing cross dock buildings or BTS. Occupation 2027.
May 2024	c/o Newsteer	100,000 – 1,000,000 sq.ft.	Leasehold only. All options considered.
May 2024	c/o Savills	400,000 – 600,000	Leasehold. Existing or under construction only.
April 2024	c/o Newmark	400,000 – 1,000,000	Leasehold. Preference for the Midlands but all options in the UK considered. Timing late 2024 or 2025.
March 2024	Confidential	500,000 – 1,000,000	Not circulated. Site purchase for self-build. National requirement.
March 2024	c/o Littler & Co	500,000	Leasehold. Not circulated. Understood to consider existing or BTS.
March 2024	c/o CBRE	15 – 30 acres	Freehold but may consider leasehold. Land capable of accommodating a building of minimum 320,000 sq.ft (would go bigger) with 40m height and 3.5+ MVA power.
February 2024	c/o Catlin Young	20 – 30 acres	Freehold land requirement for self-build premises.
February 2024	c/o 3PL Real Estate	350,000 – 600,000 sq.ft.	Leasehold. Looking for BTS opportunities with outline planning consent in place.
January 2024	c/o 3PL Real Estate	400,000 – 500,000 sq.ft.	Leasehold. Existing buildings only or those under construction.

Figure 6.10 North West Requirements Schedule

6.26. These requirements demonstrate the depth of demand from occupiers looking for buildings which could fall within the size bracket offered by the proposed scheme.

6.27. The requirements total between c.10.5 - 18.8m sq.ft. of demand for premises from occupiers who would consider an XL building (defined as 500,000 sq.ft. and above) and which included Lancashire in the search area, alongside 136 – 213 acres of land required for self-build (building size not always disclosed).

6.28. In summary:

- The National Industrial & Logistics market has consistent demand for XL Big Box units, transactions of which have represented between 32.5 - 37.5% of total Grade A Big Box take up over the last 4 years
- The North West Industrial & Logistics market has consistent demand for XL Big Box units, with at least 1 transaction per annum.
- There are 8 Grade A XL Big Box units available nationally totalling 5,573,116 sq.ft., which equates to circa 9.5 months' supply. Only one of these units is within the North West and none are within Lancashire.
- Only two sites within the North West have a detailed planning consent for an XL Big Box unit, neither of which are within Lancashire.
- Excluding the subject site, there are only two sites within Lancashire that can deliver an XL Big Box unit. One of these has compromised access by the restricted motorway junction.
- There are 33 requirements for XL Big Box units which would include Lancashire in the search area.

7. Logistics Workforce and Labour Market Overview

Introduction

7.1. Purpose of this section of the report is to provide an overview of the nature and characteristics of the Logistics Workforce, provide an overview of the local labour market and highlight the key operators within the marketplace.

The Logistics Sector

7.2. The logistics sector is a vital contributor to the UK economy, employing over 2 million people (approx. 7% of the national workforce) and generating £139 billion of value in 2019 (Logistics UK, 2022)[25].

7.3. According to the latest national figures set out in the Logistics UK report, logistics businesses generated £1.3 trillion in revenues in 2022, an increase of 25.8% compared to 2021. In the same year, logistics enterprises added £185 billion of value to the UK economy, which is around 12% of the total non-financial economy and an increase of 15.6% on the previous year[26].

7.4. The table below shows the proportion of the workforce in the north west employed in the logistics sector, compared to the UK. The table shows that the Logistics sector has become an increasingly significant employer in the UK and that the Sector has generally employed a greater proportion of the workforce in the North West. Whilst there has been some volatility in 2024-2025, the overall trend remains that the Logistics sector remains a significant employer in the North West.

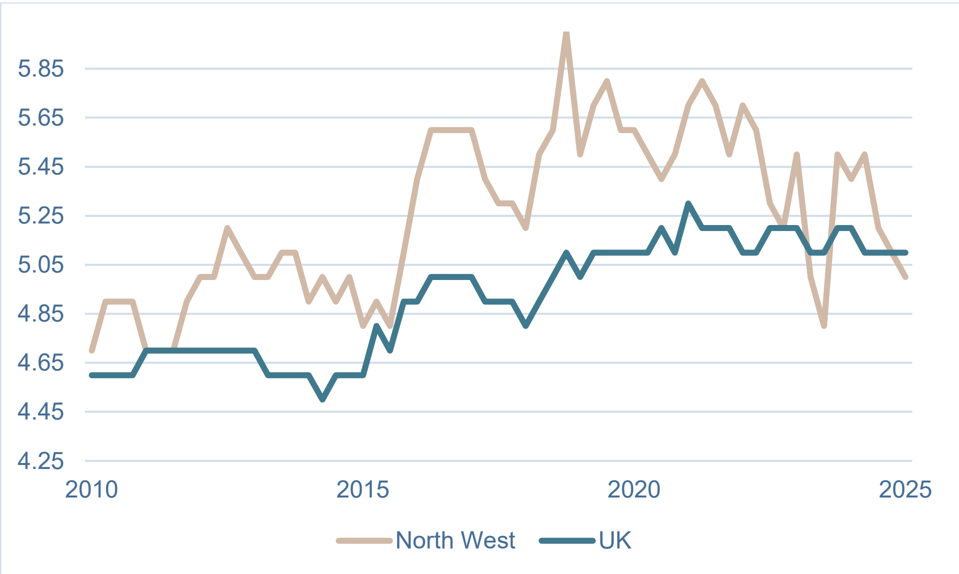

Figure 7.1: proportion of the workforce employed in Logistics

[25] Page 9, Driving Employment Growth Within the UK's Logistics Sector by Prologis, 2023
[26] Page 4, The Logistics Report Summary 2024 by Logistics UK.

Job Types

7.5. The Logistics Labour Study by Prologis shows that the logistics sector has demonstrated a relatively stable balance between full-time and part-time contracted employees. The table below compares the findings from the Prologis Study with the national average, derived from ONS data.

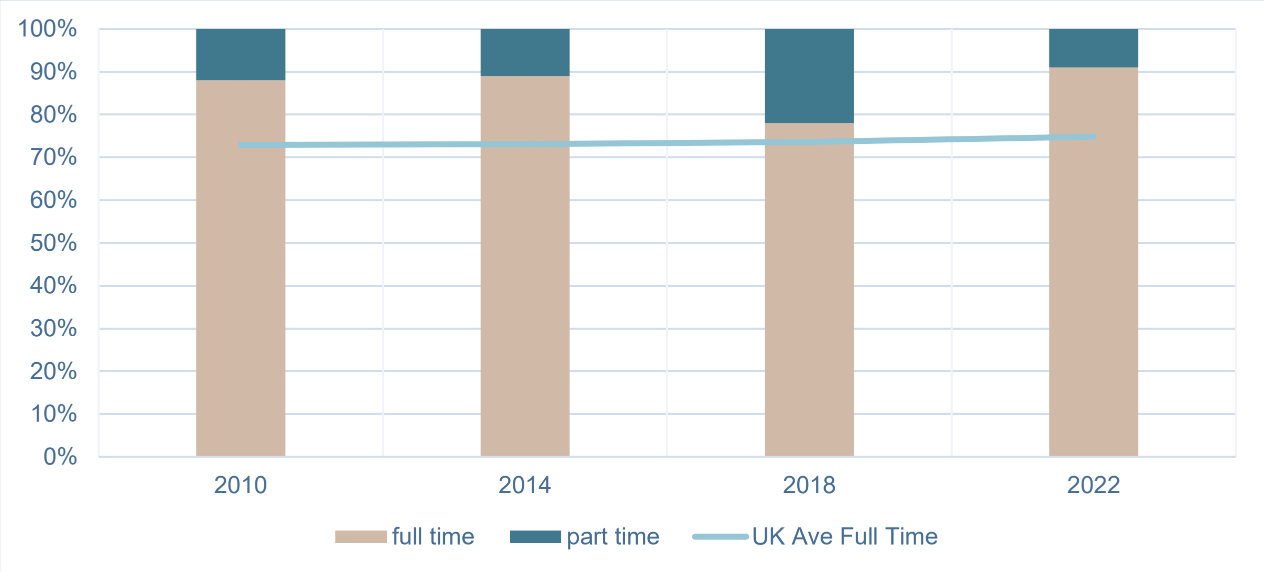

Figure 7.2: employment within the logistics sector

Source: Driving Employment Growth Within the UK's Logistics Sector by Prologis and EMP01 SA: Full-time, part-time and temporary workers (seasonally adjusted)

7.6. The data shows that the logistics sector has consistently employed proportionally more staff on a full time basis than the national average.

Gender Balance

7.7. The logistics and supply chain sector, which has traditionally been male dominated, is now seeing a rise in female workers. The Prologis Labour Report found that the sector's flexibility, particularly in working hours and conditions, is proving to be an attractive benefit for female employees – with 76% of women citing this benefit as important.

7.8. The table below shows how the proportion of women working in the logistics sector has risen since 2010. While there is still a gender gap, the data shows that the gap is narrowing.

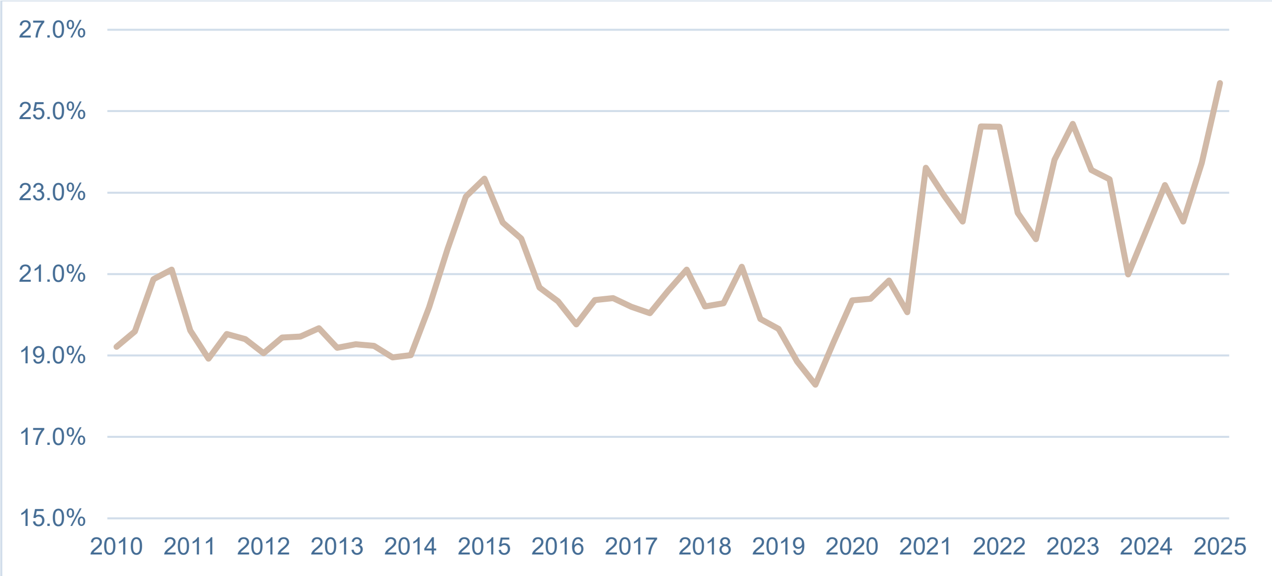

Figure 7.3: proportion of women working in the logistics sector

Source: ONS EMP13: Employment by industry

Employment Density

7.9. Prologis has tracked employment density within the logistics sector since 2006. The table below shows how employment density has changed over time. The amount of floorspace has increased over time per employee (i.e. lower employment density). This was particularly heightened between 2014 and 2018, but has since stabilised. This shows the industry's response to automation, which in the following years to 2022, has resulted in employment density steadying to a newly established level.

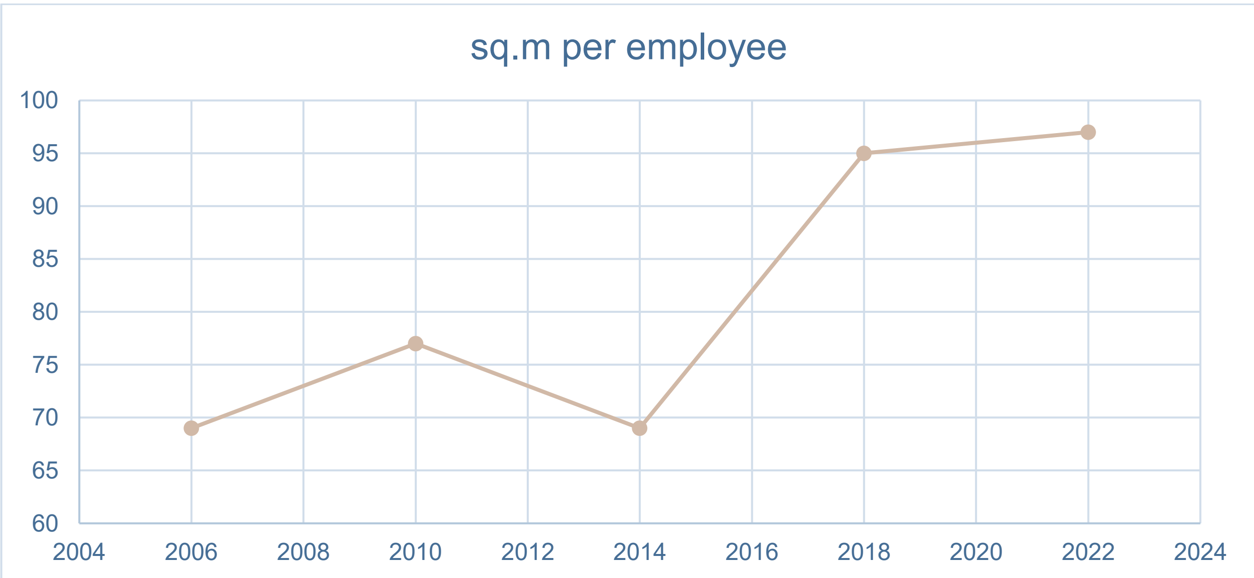

Figure 7.4: employment density within the logistics sector.

7.10. Prologis has also tracked the type of job created within logistics facilities[27]. The data is based on survey responses from logistics companies with varying building sizes and employee counts to provide a representative sample.

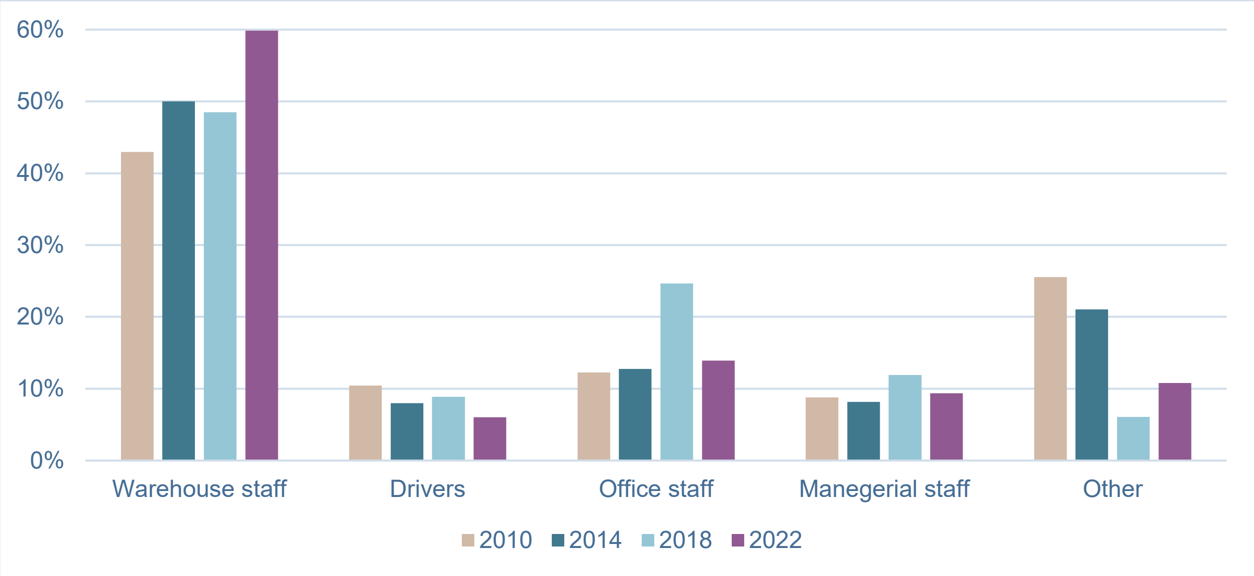

Figure 7.5: Logistics job type breakdown

7.11. While automation and advanced technologies have lowered employment density within a warehouse, it has also led to changing job types. While automation reduces the need for some manual roles, the changes create new job opportunities in areas like technology management, system maintenance, and technical support[28]. As automation increases, so does the reliance on accurate data as there is an increasing need for logistics professionals to understand and manipulate complicated data but also have a strong operational grounding to be able to interpret it. Key technical roles within the logistics industry, created by automation include[29]:

- Warehouse systems manager – responsible for managing the warehouse management systems that are linked to the automation equipment.
- Logistics analysts – there has been an increase in analytical roles, focused on extracting data to identify optimisation opportunities.
- Solutions designer – warehouse solutions design utilising specialist, technical design software such as AutoCAD.
- Project managers – there has been an increase in the demand for project managers to support implementations, system upgrading and optimisation.

7.12. The infographic below provides a breakdown of the estimated employment opportunities that would be created by the proposed development. The figures are calculated by applying the findings of the Prologis research to the 119,490 sq.m floorspace proposed by the submitted planning application.

[27] Page 13 Driving Employment Growth Within the UK's Logistics Sector by Prologis, 2023
[28] https://wprg.london/blog/how-technology-is-changing-warehouse-and-logistics-jobs/
[29] https://www.michaelpage.co.uk/our-expertise/logistics/warehouse-automation-reshaping-logistics-skills

Total Jobs	1,232
Full-Time Roles	1,121
Warehouse Staff	738
Drivers	74
Office Staff	172
Managerial Staff	115
Other Staff	133

Figure 7.6: Direct employment generation of the operational phase of the proposed development

7.13. The overall jobs created and range of jobs that are estimated to result from the proposed development are significant.

Remuneration

7.14. A quantitative study commissioned by Prologis UK in 2023 found that both full-time and part-time employees are earning above the median average salary across other industries:

> *"Full-time employees across a wide range of logistics businesses earned a median average salary of approximately £35,000, exceeding the cross-sector median of £31,461. Similarly, part-time logistics employees earned a median average of approximately £15,000 per annum, well above the cross-sector median of £11,234."*[30]

7.15. These findings are supported by the latest ONS weekly earnings data, which shows that logistics workers earn an above median wage, more than education, health and manufacturing workers.

[30] Page 14 Driving Employment Growth Within the UK's Logistics Sector by Prologis, 2023

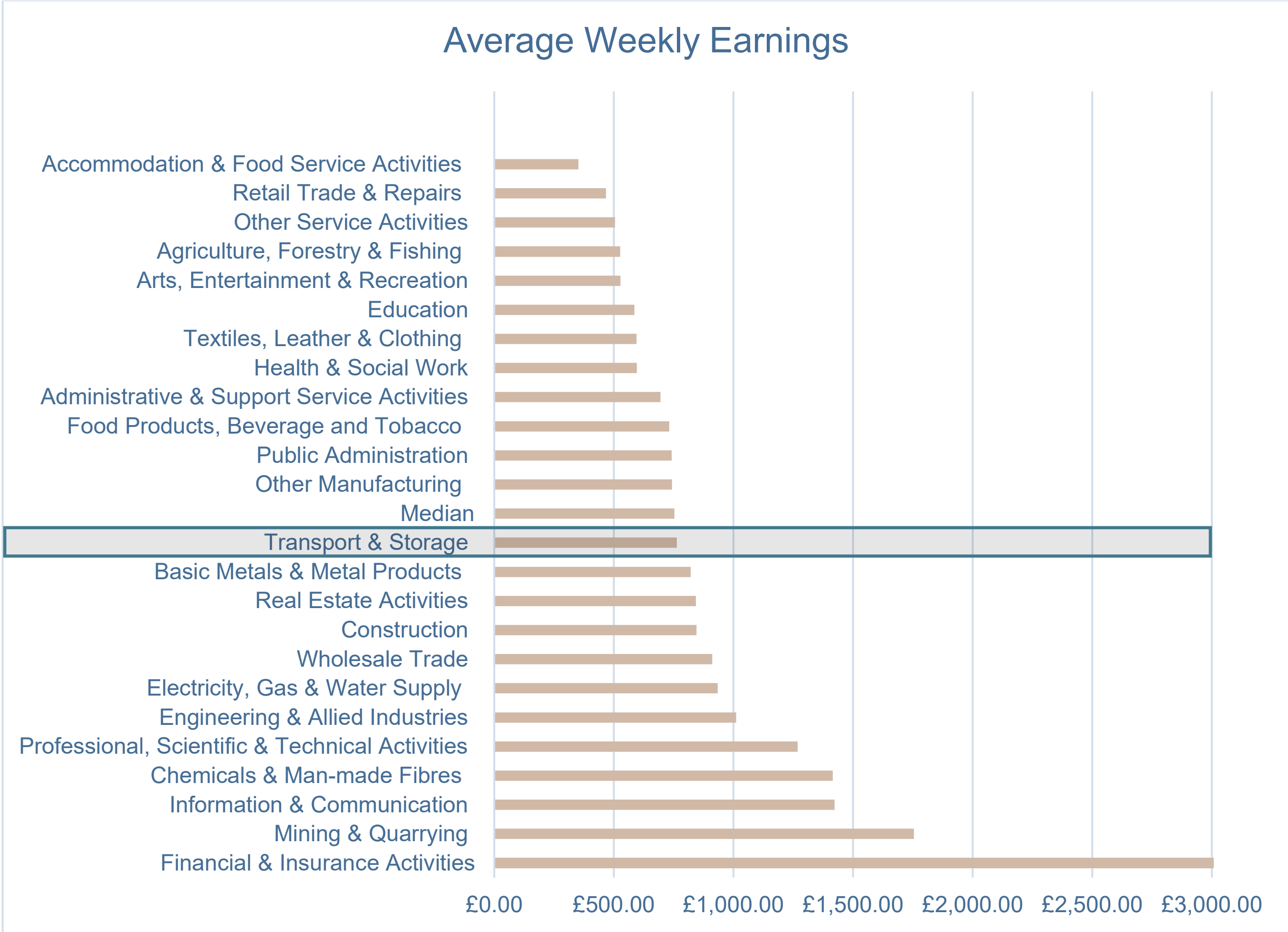

Figure 7.7: NOMIS Average Weekly Earnings May 2025

7.16. Based on this average earnings data and the job creation set out above, the total wage generation of the proposed development once operational, is set out in the infographic below:

Average Weekly Earnings	£763.05
Average Salary	£39,678.60
Total Wages	£48,878,308.39

Figure 7.8: Annual earnings generated during the operational phase of the proposed development

Local Labour Market Overview

7.17. An assessment of key labour market indicators is provided within the Logistics Study, prepared by Model Logic Ltd, also submitted in support of this planning application. The Logistics Study uses drive time isochrones as the basis of its analysis, highlighting that within 60 minutes of the site, there is a local population of 7.26 million.

7.18. JLL has undertaken further analysis of the local labour market, based upon the Property Market Area (PMA) identified by Iceni and Fischer German in their Employment Land Needs Assessment and Employment Land Report. The PMA comprises the local council areas of Chorley, Preston, South Ribble, Blackburn with Darwen, Hyndburn and Burnley. The data for the analysis is taken from the ONS NOMIS Local Area Profiles, which are sourced from the 2021 Census.

7.19. The table below shows that the proportion of economically active people in the workday population (over the age of 16) in the PMA, compared to the regional and national averages.

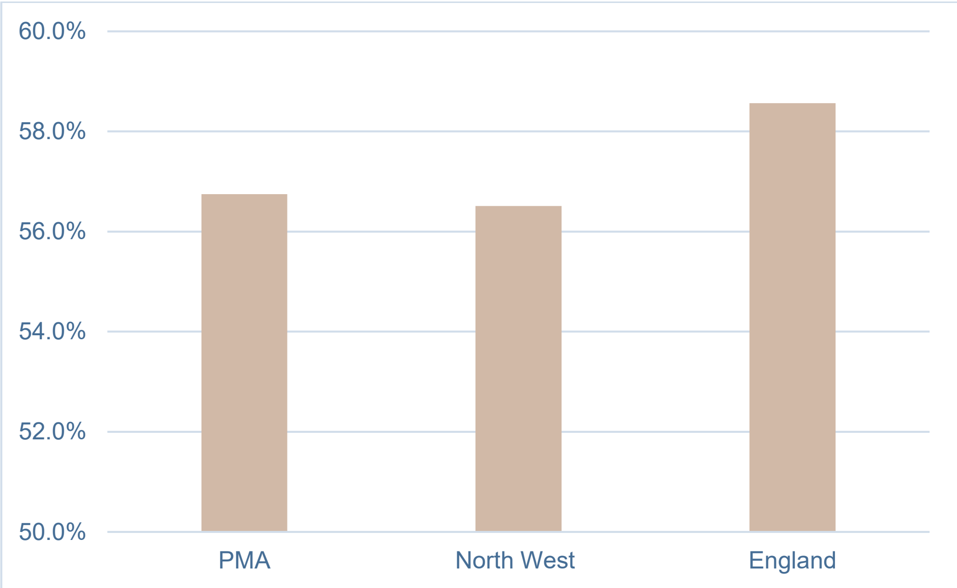

Figure 7.9 proportion of economically active people in the workday population

7.20. While the proportion of economically active people within the PMA is higher than the regional average, it is almost 2 points below the national average. The reasons for this vary across the PMA, but the principal reasons are that within Chorley and South Ribble there is a markedly higher proportion of retired individuals and within Blackburn, Hyndburn and Burnley, there is a noticeably higher proportion of long-term sick or disabled individuals and a higher proportion of individuals looking after the home or family.

7.21. Notwithstanding this, there is an economically active workforce in the PMA of over 320,000 people.

7.22. As the figure below illustrates, the unemployment rate within the PMA is below both the regional and national averages, showing that the area benefits from a strong jobs market.

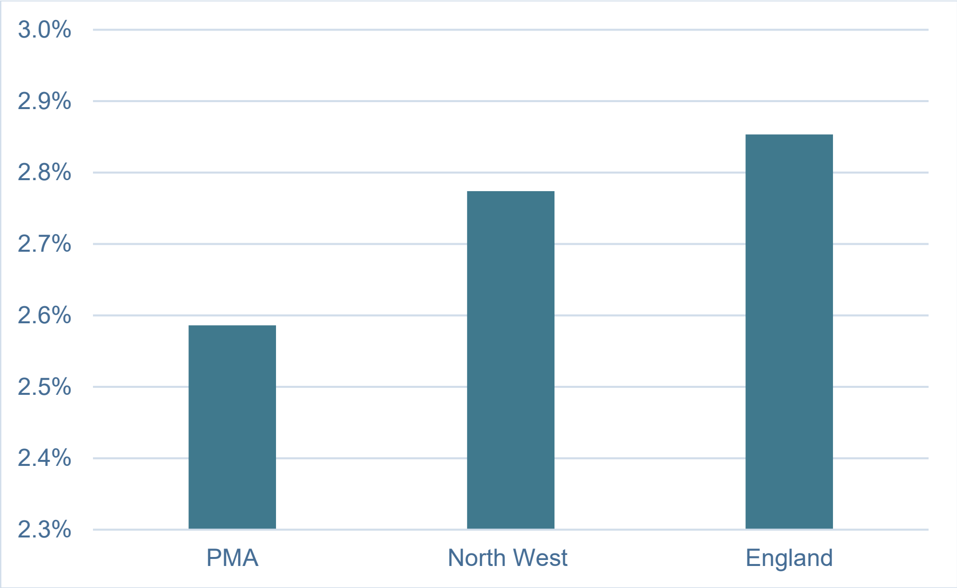

Figure 7.10 Unemployment rates (excluding students)

7.23. As highlighted previously in this Section, the logistics sector forms a strong part of the North West's economy, typically employing a higher proportion of the workforce than the national average. However, as the figure below shows, the logistics sector has not been as significant an employer within the PMA. Within the PMA, Hyndburn (5.1%) is the only area to match either the regional or national averages.

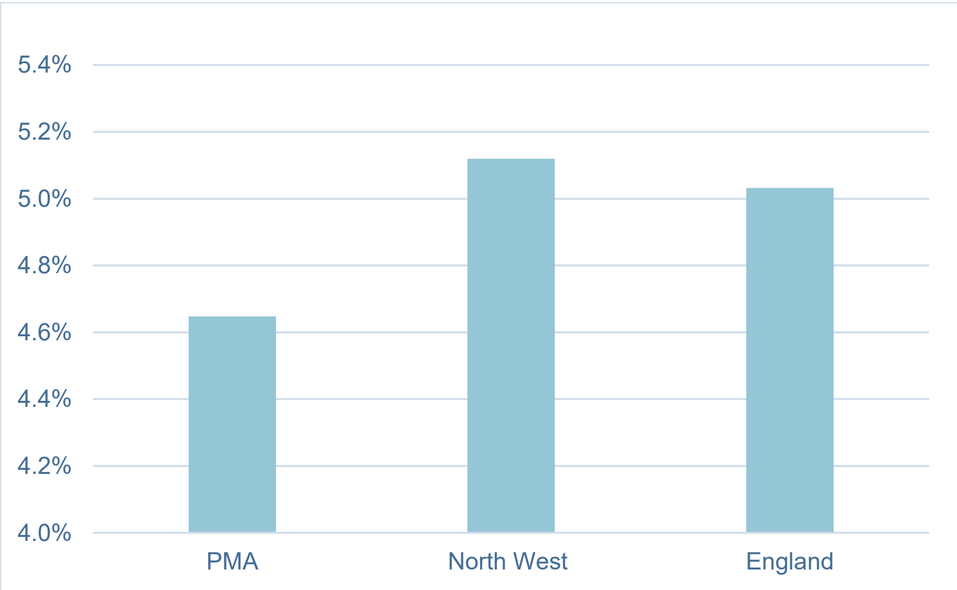

Figure 7.11 proportion of employment within the Logistics sector.

7.24. This can be viewed as surprising, given the PMA's strong transportation links and access to the primary highway network, including the M6, M61, M65 and M55. This may indicate that while there has previously been under-provision of logistics development in the PMA, the area has the capacity to embrace growth within the sector.

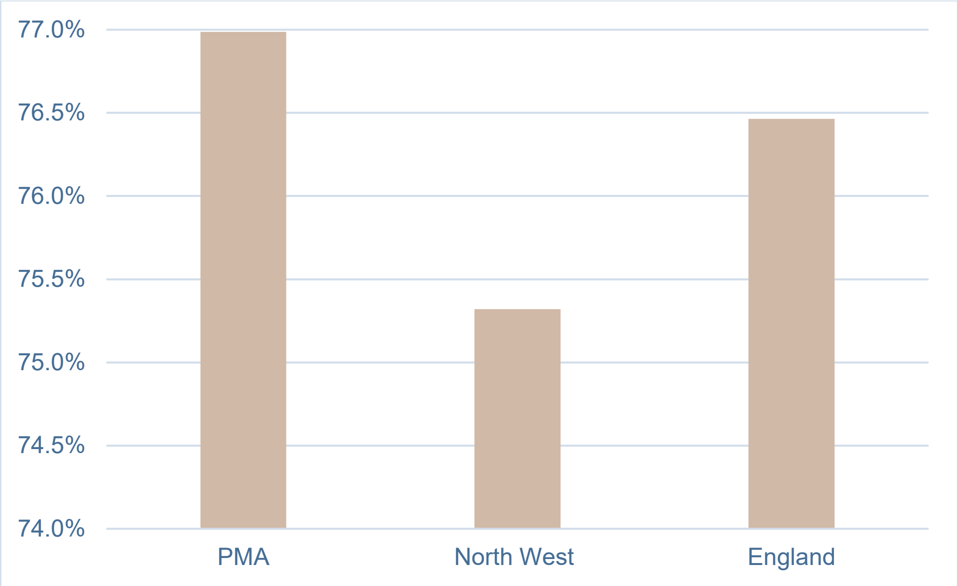

Figure 7.12 Car Ownership

7.25. The figure above shows that the proportion of households with access to at least one car or van is above the national average and is comfortably above the regional average. This would suggest that the workforce within the PMA is mobile and able to travel to work.

7.26. This finding is supported by the travel to work data, which, as set out in the figure below, shows that when compared to both the regional and national averages, a greater proportion of workers within the PMA travel by car, either as the driver or passenger.

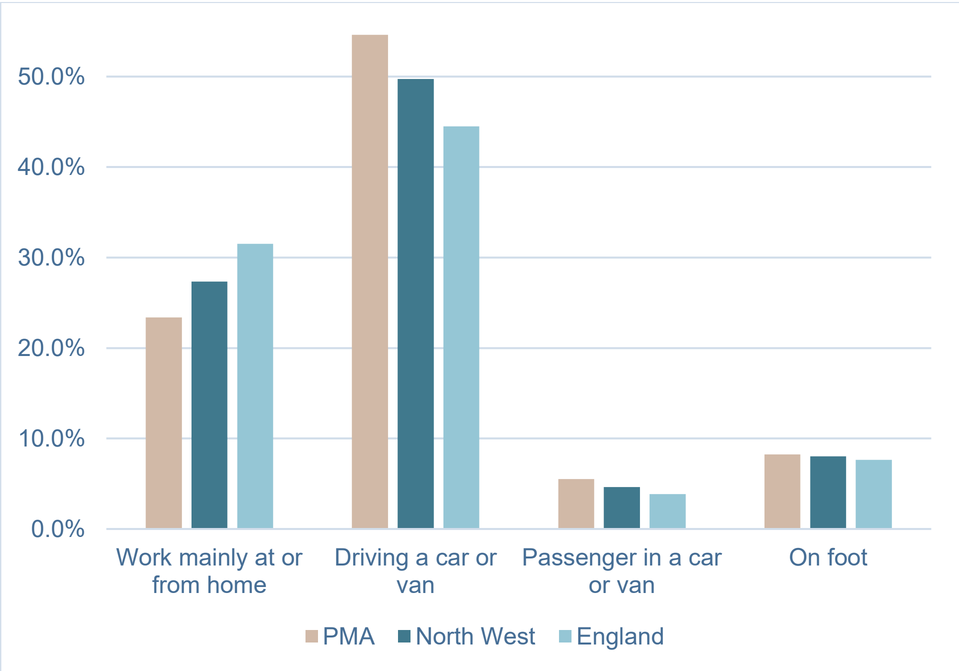

Figure 7.13 main methods of travel to work

Summary

7.27. Data shows that logistics businesses generated £1.3 trillion in revenues in 2022, an increase of 25.8% compared to 2021, highlighting its growing in importance.

7.28. The Logistics sector is an important employer nationally, particularly so in the north west, where the sector has employed a greater proportion of the workforce over the last 15 years.

7.29. Research has shown that the logistics sector provides a stable career choice, offering more permanent roles than on average and the typical worker will earn a higher salary than the median income. In addition, the sector also offers flexibility to workers, with roles for part time workers available.

7.30. ONS data shows that there is an improving gender balance within the logistics workforce, with a greater proportion of women being employed within the sector.

7.31. There is a range of roles available within the sector, providing opportunities to a wide demographic. While employment density has fallen since 2014 due to increased automation, employment density has stabilised across the sector.

7.32. A review of the local labour market shows that there is a Strong local employment market in the PMA and that there is clear scope for logistics sector to deliver growth in the PMA.

7.33. The PMA also benefits from high levels of car ownership and mobility, indicating a workforce that is willing and able to travel to work.

7.34. Using the research on employment density carried out by Prologis and average earnings data published by the ONS, JLL estimate the proposed development will deliver significant economic benefits for the local economy.

8. Conclusions

Big Box Logistics Demand and Supply

8.1. Despite the market reverting to pre-Covid 19 levels of take up, there is still strong and consistent demand for Grade A Big Box (100,000 sq.ft.+) Industrial & Logistics premises.

8.2. This demand is from a variety of sectors including logistics, retail, manufacturing and defence. Along with conventional business requirements (for example, strategic relocation or expansion), geopolitical instability and changing trade relationships are leading to occupiers re-assessing their supply chains in order to have greater control which may lead to a greater volume of stock being held.

8.3. Within the Big Box market, there is sustained demand for premises over 500,000 sq.ft. Nationally, demand for these XL premises consistently equates to circa 35% of total Grade A Big Box take up and has averaged at circa 7.15m sq.ft. per annum over 2023 and 2024.

8.4. An analysis of current supply levels indicates that there are only 7 Grade A XL Big Box units available nationally totalling 5.5m sq.ft., which equates to circa 9.5 months' supply. Only one of these units is within the North West and none are within Lancashire.

8.5. The subject site offers a large and regularly shaped footprint to enable the delivery of two XL premises (533,464 and 752,726 sq.ft. respectively). The site benefits from immediate access onto the M65, which provides links to the national motorway network (principally the M61 and M6) along with the ports at Liverpool.

8.6. There are 33 requirements for XL Big Box units which would include Lancashire in the search area, however there are only two sites within the North West which have a detailed planning consent for an XL Big Box, neither of which are within Lancashire. Excluding the subject site, there are only two sites within Lancashire that can deliver an XL Big Box unit and one of these is compromised due to access by a restricted motorway junction.

8.7. Obtaining a planning consent for this scheme will provide the region with an attractive, deliverable Industrial & Logistics opportunity which will result in significant job creation and substantial business rates revenue for the local authority.

Employment Land Evidence Base

8.8. JLL has not undertaken a full and detailed review of the employment land evidence base for central Lancashire. However, JLL consider that the evidence base does not fully consider the physical and locational requirements of big box logistics development. As a result, the studies are likely to over-estimate the ability of available land supply to meet logistics needs and therefore under-estimate the land required to meet the OAN. As notes in Section 3, Iceni has carried out an extensive review of the employment land evidence base, concluding that there is a significant under-estimation of the land needed to meet the needs of the strategic logistics sector.

UK Logistics Strategy

8.9. On 23 June 2025 the UK Government published The UK's Modern Industrial Strategy, which sets out the Industrial Strategy, the 10-year plan to significantly increase business investment in 8 growth-driving sectors, by making it quicker and easier for businesses to invest and providing them with the certainty and stability needed for long-term investment decisions.

8.10. The Strategy identifies ten areas where the government will focus intervention to help deliver growth, which includes removing planning barriers.

8.11. While the logistics sector is not identified as one of the key IS-8 sectors, the Strategy recognises the importance of Logistics in supporting growth across a number of the IS-8 sectors and includes a section on the importance of Freight and Logistics. The Strategy also states that the government will work closely with industry and deliver a new plan for freight and logistics later this year so that the sector can continue to play its part in growing the economy.

Logistics Workforce and Labour Market Overview

8.12. Data shows that logistics businesses generated £1.3 trillion in revenues in 2022, an increase of 25.8% compared to 2021, highlighting its growing in importance.

8.13. The Logistics sector is an important employer nationally, particularly so in the north west, where the sector has employed a greater proportion of the workforce over the last 15 years.

8.14. Research has shown that the logistics sector provides a stable career choice, offering more permanent roles than on average and the typical worker will earn a higher salary than the median income. In addition, the sector also offers flexibility to workers, with roles for part time workers available.

8.15. ONS data shows that there is an improving gender balance within the logistics workforce, with a greater proportion of women being employed within the sector.

8.16. There is a range of roles available within the sector, providing opportunities to a wide demographic. While employment density has fallen since 2014 due to increased automation, employment density has stabilised across the sector.

8.17. A review of the local labour market shows that there is a Strong local employment market in the PMA and that there is clear scope for logistics sector to deliver growth in the PMA.

8.18. The PMA also benefits from high levels of car ownership and mobility, indicating a workforce that is willing and able to travel to work.

Benefits of the Scheme

8.19. Using the research on employment density carried out by Prologis and average earnings data published by the ONS, JLL estimate the proposed development will deliver significant economic benefits for the local economy.

Total Jobs	1,232
Full-Time Roles	1,121
Warehouse Staff	738
Drivers	74
Office Staff	172
Managerial Staff	115
Other Staff	133

Figure 8.1 Employment generation of the operational phase of the proposed development

Average Weekly Earnings	£763.05
Average Salary	£39,678.60
Total Wages	£48,878,308.39

Figure 8.2 Annual earnings generated during the operational phase of the proposed development

8.20. These economic benefits are significant to the local economy, providing a range of jobs for the local market, and should carry significant weight in the planning balance.

We can support you with expert advice that reflects your business needs and priorities

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