



Employment Land and Premises Study Update

Sefton Council



Final Report

August 2015

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EXECUTIVE SUMMARY

Introduction

- i) This report assesses the supply, need and demand for employment land and premises (use class B) in Sefton. It has been carried out for Sefton Council to provide robust evidence to underpin and inform its emerging Local Plan for the period to 2030, and onwards to 2035. The report updates the relevant elements of the previous employment land evidence base document, the Employment Land and Premises Study Refresh (2012) which was also completed by BE Group.
- ii) The study has five objectives, as outlined in Section 1.0 of the main report:
- To reflect up to date economic forecasts, and thus the consequences of recovery from economic recession. The forecasts are to reflect an extended timescale to 2035
 - To build upon previous research work, largely carried out by BE Group, including the 2014/15 Dunnings Bridge Road Economic Investment Strategy, 2014/15 Port of Liverpool Employment Potential Study, the 2012 Sefton Employment Land and Premises Study Refresh and the 2010 Joint Employment Land Study for Sefton, Knowsley, Halton and West Lancashire. It will update this work and account for changes in national policy including the publication of Planning Practice Guidance
 - To consider the changing local and sub-regional/regional markets; projected growth in demand for logistics space in the sub-region and new Local Plan proposals for three new business parks on Green Belt sites
 - To consider the projected growth in demand for logistics space in Sefton, and across the sub-region resulting, at least in part, from growth at the Port of Liverpool
 - To review the likely role and function of the three proposed business parks in Green Belt proposed in the emerging local plan, identifying any constraints to their provision, along with the ongoing viability of existing employment areas.

Methodology

- iii) A number of research methods have been used including site visits and interviews with public sector agencies involved in the Borough (and in neighbouring local authority areas); 13 major businesses; key developers, landowners and their agents. Desktop analysis of existing strategies, reports and documents has also been used

to inform the overall findings. Finally the land supply has been assessed against forecast data to understand the future need for any additional employment land. This is then developed into a series of economic development recommendations that cover not just land, but also premises. The methodology follows Planning Practice Guidance (PPG) on the production of employment land reviews.

Findings

- iv) As noted in Section 3.0 of the main report, Sefton is an economically active area with a reasonably skilled workforce. Unemployment is low in the context of the Liverpool City Region, and in regional and national contexts. However, Sefton also has a strong dependence on public sector employment – 41.1 percent of the Borough’s workforce is employed in public administration, education and health. This is high in the Liverpool City Region, regional and national contexts. In comparison, local manufacturing appears to have a modest economic role, accounting for 4.8 percent of local employment compared to 7 percent of jobs across Liverpool City Region and 10.1 percent across the North West
- v) In terms of service sectors, professional, scientific and technical and information and communication have the strongest roles and account for a high proportion (17.8 percent) of local businesses. Overall, there were some 8,375 businesses operating in the Borough in 2014. Most of those businesses employ less than ten employees (81.1 percent).
- vi) In terms of commuting, Sefton is a net exporter of labour, with the second largest level of net outflow in the Liverpool City Region (-19,181), after that in Wirral. In 2011 at least, 53 percent of the Borough’s working residents lived and worked in the area. This was a fairly average level of self-containment in the Liverpool City Region.
- vii) Market demand in Sefton is assessed in Section 4.0 of the main report and particularly in relation to discussions held with ten property market stakeholders in paragraphs 4.83-4.99 of that section.
- viii) Industrial requirements are for production and warehouse space of up to 5,000-10,000 sqm, while the local micro-small business market appears to require industrial units of up to 500 sqm. In terms of logistics and larger B2 manufacturing occupiers, agents working across the North West are receiving requirements for units of up to 50,000 sqm, of relevance to Sefton. These are from national businesses who may be

considering a range of locations. Against this demand there is an undersupply of modern, moderate or good quality premises of up to 1,000 sqm and particularly units of 500-800 sqm. At the larger scale, based on the current marketed supply, meeting demand for any single unit of more than 6,000 sqm is challenging, particularly if the demand is for modern space.

- ix) In terms of offices, agents remain somewhat less confident about the demand picture. In South Sefton, the biggest barrier for lettings is the fact that companies looking for space in the inner Liverpool Conurbation still do not see Bootle Office Quarter as part of their area of search. Local demand is for suites of up to 200 sqm and town centre space, particularly in Southport Town Centre, is most popular.
- x) Consultations with a sample of the larger businesses in the Borough are recorded in detail in Appendix 3 and summarised in Section 5.0. Five of the 13 businesses have growth aspirations. For the most part these businesses do not envisage there will be any problems in finding the land or premises they need locally. The main exception is within the Port Estate, where space is increasingly constrained given broader growth in Port operations. In the longer term this may have implications for the operations of some Port tenants.
- xi) This reflects the findings of the Port of Liverpool Employment Potential Study (2015) – Business Survey Report, which indicated very high levels of satisfaction in the Borough and its current premises offer. Businesses are also relatively confident about short term prospects for growth. In terms of turnover at least, the majority predict improvements of around 10 percent over the next few years.
- xii) As noted in Section 5.0 (paragraphs 5.29-5.58) of the main report, all of the local authorities around Sefton feel they are able to meet their employment land needs on land within their own local authority area boundaries.

Employment Land Supply

- xiii) Sefton's current and emerging land supply is discussed in Section 6.0 of the main report. At 31st March 2015 there was a local supply of 82.10 ha of available employment land, made up of 11 sites (which has been adjusted to 88.59 ha to allow for the position at the start of the Plan period, in 2012). This comprises land proposed under Policy MN2: Housing, Employment, and Mixed Use Allocations of the emerging 'A Local Plan for Sefton: Submission Draft.'

- xiv) All of the employment sites proposed are developable and deliverable, even if some of the smaller sites in South Sefton appear to be long term development prospects. None are being held for the use of specific businesses, and in principle, all should be able to provide development land within the Local Plan period. For the most part Local Plan sites have already been netted down to exclude any land proposed for non B-Class development. However, an element of enabling development is also likely to be needed at MN2.51: Switch Car Site, Wakefield Road, Netherton and MN2.47(a): former Peerless Refinery, Dunnings Bridge Road, Netherton, to secure change.
- xv) Section 8.0 of the main report provides an assessment of Objectively Assessed Needs based around two main models – Historic land take-up forecast and Employment based forecast. The results can be seen in Table ES1.
- xvi) When measured against long term past take-up rates, the forecast demand is for 54.72 ha to 2030, 69.92 ha to 2035, from a base date of 2012. By this measure a surplus of 18.67 ha will remain at 2035.
- xvii) The other forecast model (baseline employment) suggests the Borough has a sizable oversupply of employment land. This would suggest that much of the current land supply is surplus to requirements and could be used for other activities. However, the market assessment and a review of the historic trends in employment change and land take up (see Section 8.0) suggest that these forecasts underestimate land needs significantly.

Table ES1 – Land Forecast Models – Summary

Model	Land Stock adjusted to 2012, ha	Land Need 2012-2030, ha	Surplus (Shortfall), ha	Land Need 2012-2035, ha	Surplus (Shortfall), ha	Assumptions
Historic Land Take-Up Rate/ Adjusted stock	88.59	54.72	33.87	69.92	18.67	Based on ha/year
Employment based on adjusted stock	88.59	23.54	65.05	25.44	63.15	Based on net jobs change for the periods

Source: BE Group 2015

- xviii) Sefton’s previous take up can be split by the main employment use classes – B1 (a, b, c), B2, B8 (see Table ES2).

Table ES2 – Need, Split by Use Class

Period	Use Class (Percentage Split, percent)					Total (ha)
	B1(a) (14.9)	B1(b) (-)	B1(c) (21.1)	B2 (36.3)	B8 (27.7)	
2012-2030	8.15	-	11.54	19.86	15.17	54.72
2012-2035	10.42	-	14.75	25.38	19.37	69.92

Source: BE Group, 2015

- xix) However, the Local Plan period is also likely to see employment land losses to other uses including non-B Class enabling development on some sites; the loss of the former Philips Factory, Southport to housing; some further housing losses and potentially land lost to Port growth. This study has endeavoured to account for these losses even if some of the figures applied should be treated as indicative only.
- xx) Table ES3 measures the impact of these deductions on the surplus shown in Table ES1 above, measured against historic take-up, over 2012-2030. As shown, a surplus of **17.24 ha** remains to 2030. To 2035, the surplus reduces to **2.04 ha**.

Table ES3 – Trend Based Forecast of Land Take-up – Deductions Adjusted*

Current land surplus 2012-2030 (Historic Take-Up Rate from Table 65, less land supply), ha	Further Deductions, ha	Adjusted Figure, ha
33.87	(6.00) Accounting for the loss of the former Philips Factory, Southport Indicative figure accounting for likely further land losses to non-B Class development, including enabling development on employment sites and (modest) losses to housing (8.00) (2.63) Additional land needs resulting from the displacement of businesses, from Regent Road/Derby Road, due to Port expansion	17.24

Source: BE Group 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

- xxi) Allowing for these deductions, Sefton still has sufficient land for the 2012-2030 Plan period while providing a further five years supply to 2035. However, meeting all the needs will require the full range of allocations proposed in the Submission Draft Local Plan, including the Green Belt sites and there is limited scope for land losses, apart from some of the enabling options allowed for.

Recommendations

- xxii) This report has had full regard to the requirements of NPPF and PPG, to encourage and deliver growth through the planning system. The key recommendations, as outlined in Section 10.0 of the main report, are:
- The Borough Council should protect existing employment areas that are not the subject of consents for alternative uses. In the eight lower quality locations, graded C/D and D in this study, there is a need for ongoing monitoring for signs of further decline or increased vacancy
 - The former Philips Factory, Balmoral Drive, Southport is suitable for reallocation to other uses in its entirety. This reflects the fact that the main factory complex is fully vacant and moving towards dereliction. It also reflects the unlikelihood that the site, which is in a mostly residential area some distance from the other Employment Areas of North Sefton and the primary road network, can be redeveloped for B1/B2/B8 uses
 - A need of 54.72 ha to 2030 and 69.92 ha to 2035 is identified. Against this backdated supply of 88.59 ha, a surplus of 18.67 ha will remain at 2035 (surplus to 2030 = 33.87 ha)
 - Accounting for a range of plausible losses to the land supply will potentially reduce that surplus to 17.24 ha by 2030 and 2.04 ha to 2035.
 - The Local Plan thus provides sufficient land to account for both needs and potential losses to 2030, with a further 5 year buffer to 2035. However, there is little surplus beyond this. The Council should seek to retain and protect all employment sites currently proposed in the Submission Draft Local Plan, including the main Green Belt sites which are a core component of supply for B1/B2/B8 uses.
 - The Council should continue work with neighbouring authorities in order to ensure a joined up approach to employment matters and economic development across the Liverpool City Region and beyond. As part of this there remains a need to clarify, how the needs emerging from a growing Port will affect all of the local authorities of the Liverpool City Region and how

wider land requirements can be realistically divided up. Thus it is recommended that the Council participate in a wider Port and logistics needs study, incorporating all of the affected local authorities and the Liverpool LEP

- Review and monitor the employment land and premises position and undertake the study again in about three years, as 2030 and 2035 are a long time in the future and much will happen before then
- Table ES3 makes a range of recommendations for the new large allocations of the emerging Local Plan.

Table ES3 – Recommendations for Emerging Allocations

Proposed Allocation	Comment
<p>MN2.46 and MN3: Land East of Maghull</p>	<p>As Sefton’s only employment site with direct motorway access, this land will clearly be most desirable to occupiers for whom strategic road access is essential. This may include larger manufacturing companies but is particularly likely to favour B8 logistics operations.</p> <p>However, the current linear development site would also be less suited to meeting major logistics requirements, which could form a core element of premises demand here. A more ‘square’ shape would maximise its ability to support one or more ‘big box’ logistics sheds and be divided into large plots. The main access road should run along the edge of the employment site, rather to maximise the size of the plots which could be delivered or possibly allow the whole site to be developed for a single occupier.</p> <p>As an initial approach, it is therefore recommended that masterplan layout options be coordinated to provide a mix of flexible accommodation of B1(a), B1(c), B2 and B8 uses, or B8 in isolation which would meet with the specific demand of individual or multiples occupiers. If however, MN2.46 and MN3: Land East of Maghull is taken forward, in the current configuration, as a primarily small to mid-sized business scheme it is suggested that further demand research is required to determine if local and sub-regional demand can support this scale of provision, at this location.</p> <p>The Local Plan requires that serviced plots should be made available on 25 percent of the business park before the 500th house is completed. Changes are to this policy are being discussed. The agreed revisions will be recommended as a Modification when the Local Plan is examined. However, there will be a need to secure provision of the employment element in a legal agreement (Section 106 or equivalent) that will require actions, at key points, from the current development partners.</p> <p>As an important first step the development partnership should be encouraged to tender for a developer to deliver the employment element in the short term. While the Council, which is not a landowner, cannot directly undertake this exercise it can support the marketing and decision making associated with this.</p> <p>To remove an element of uncertainty it is suggested the Council prepare, in partnership with other stakeholders, a masterplan or Supplementary Planning Document (SPD), for the site, incorporating decisions made on the above points. This should be something all parties are encouraged to sign up to, providing a plan for delivery.</p>
<p>MN2.48 and MN4: Land to the North of Formby</p>	<p>Proposals here appear to be proceeding at a pace without the need for public sector intervention.</p> <p>The main site constraints are assumed to be flood risk and highways access, although a design option has already been put forward for the northern site to</p>

Proposed Allocation	Comment
Industrial Estate MN2.49 and MN5: Land to the South of Formby Industrial Estate	address flooding. As early as possible the Council and the development partners should negotiate and agree a statement of approach on how these two issues can be addressed. This should be a position all parties are comfortable in defending against any subsequent objections. The above could form part of a wider Development Brief for the two sites. In addition to relevant design and planning issues the Brief should look at issues of phasing to ensure that, as much as possible, the two sites are not delivering similar property elements at the same time and seek to complement rather than compete with each other.

Source: BE Group, 2015

xxiii) Indicative job creation figures for the three sites are provided in Table ES4, summarising findings in Section 6.0 and in Appendix 4.

Table ES4 – Indicative Job Creation Figures for the New Employment Sites*

Site	Jobs by Use Class					Total	Comments
	B1(a)	B1(b)	B1(c)	B2	B8		
MN2.46 and MN3: Land East of Maghull							
							-
Option A: Land developed for two 23,000 sqm B8 units (46,000 sqm)	-	-	-	-	575	575	Reflects current average logistics requirements on a realigned site
Option B: Land developed for single 78,000 sqm B8 unit	-	-	-	-	975	975	Reflects the largest solus logistics development possible on a realigned site
Option C: Business Park development	1,950	-	414	542	279	3,185	Indicative jobs generation from a mixed business park.
MN2.48 and MN4: Land North of Formby Industrial Estate							
Option A: If larger plots are delivered for 100 percent B2 uses at 1 job per 36 sqm	530	-	192	581	52	1,355	Based on the indicative site masterplan
Option B: If larger plots are delivered for 100 percent B8 uses at 1 job per 70 sqm	530	-	192	-	351	1,073	
Option C: If larger plots are delivered for 50 percent B2/50 percent B8	530	-	192	290	201	1,213	
MN2.49 and MN5: Land South of Formby Industrial Estate							
Option A: If larger plots are delivered for 100 percent B2 uses at 1 job per 36 sqm	-	-	145	379	98	622	Assumes maximum use of the 7 ha net site for B-Class uses, some 27,300 sqm at 3,900 sqm/hectare. This is above what has been put forward in site research to
Option B: If larger plots are delivered for 100 percent B8 uses at 1 job per 70 sqm	-	-	145	-	293	438	
Option C: If larger plots are	-	-	145	190	196	531	

Site	Jobs by Use Class					Total	Comments
	B1(a)	B1(b)	B1(c)	B2	B8		
delivered for 50 percent B2/50 percent B8							date.

Source: BE Group, 2015

*Employment in B-Class premises only. Based on HCA (2010) average employment densities.

1.0 INTRODUCTION

1.1 This report provides an employment land and premises study for Sefton. It has been carried out on behalf of Sefton Council (the Council).

1.2 BE Group compiled this report during May-July 2015, though the base date for current land supply was set by the Council as 31st March 2014. The report updates the relevant elements of the previous employment land evidence base document, the Employment Land and Premises Study Refresh (2012) which was also completed by BE Group.

Study Objectives

1.3 The Update is required as the evidence base to underpin the Council's decision making on future employment land allocations in terms of scale and locations.

1.4 The study has five objectives:

- To reflect up to date economic forecasts, and thus the consequences of recovery from economic recession. The forecasts are to reflect an extended timescale to 2035
- To build upon previous research work, largely carried out by BE Group, including the 2014/15 Dunnings Bridge Road Economic Investment Strategy, 2014/15 Port of Liverpool Employment Potential Study, the 2012 Sefton Employment Land and Premises Study Refresh and the 2010 Joint Employment Land Study for Sefton, Knowsley, Halton and West Lancashire. It will update this work and account for changes in national policy including the publication of Planning Practice Guidance
- To consider the changing local and sub-regional/regional markets; projected growth in demand for logistics space in the sub-region and new Local Plan proposals for three new business parks on Green Belt sites
- To consider the projected growth in demand for logistics space in Sefton, and across the sub-region resulting, at least in part, from growth at the Port of Liverpool
- To review the likely role and function of the three proposed business parks in Green Belt proposed in the emerging local plan, identifying any constraints to their provision, along with the ongoing viability of existing employment areas.

Background

- 1.5 The Sefton Local Plan, Submission Draft 2015 sets out a requirement for 84.5 ha of B-Class employment land in Sefton for the period 2012-2030. Almost three quarters of this future supply (61.8 ha) is proposed on four main strategic sites:
- MN2.46 and MN3: Land East of Maghull – 20 ha (net)
 - Dunnings Bridge Road Corridor, Netherton (MN2.47(c): Senate Business Park, Atlantic Business Park, and the MN2.47(a): former Peerless Refinery Site) – 26.8 ha
 - MN2.48 and MN4: Land to the North of Formby Industrial Estate – 8 ha (net)
 - MN2.49 and MN5: Land to the South of Formby Industrial Estate – 7 ha (net).
- 1.6 The Council wants to make sure that this land, both the local and strategic employment land supply, is used for the right purposes, meeting the needs of existing and future businesses. The Council also wishes to understand whether there are any remaining gaps in the provision of land and property, after these allocations have been taken into account.
- 1.7 Land and premises need to reflect the changing requirements of businesses and local economies. The study therefore assesses the suitability of existing employment sites, and makes recommendations in respect of those that should continue to be safeguarded for employment uses; identifies sites no longer suitable for employment uses (at least in their present form); and, considers the need for new allocations. Planning policies are intended to intervene in the market to ensure amongst other things an appropriate balance between housing and employment uses in Sefton. Whilst the drive to deliver more housing is important, it should not be at the expense of losing important sites that contribute to the local economy or offer new opportunities for economic development and which can reduce high levels of unemployment, especially in South Sefton, and the high levels of out-commuting by Sefton residents. As well as securing sustainable development for employment purposes, a realistic view is taken of the operation and vitality of the market.
- 1.8 The study covers all industrial, warehousing and distribution uses, as well as offices. It does not refer to all uses that provide jobs (e.g. health, education), but in addition to the above group of uses, it considers uses that may share certain locational and physical characteristics. The study is therefore primarily concerned with those uses included within the planning Use Class B – B1 (business offices), B2 (industrial) and

B8 (storage and distribution), appropriate sui generis uses including recycling and the environmental industry.

Methodology

- 1.9 Research methods used include site visits, face-to-face and telephone interviews with property market stakeholders such as developers, investors and their agents. Consultations have been undertaken with a number of the Borough's major private sector employers and key public sector agencies, including the Liverpool Local Enterprise Partnership. Desktop analysis of national, sub-regional and local reports and strategies has been undertaken.
- 1.10 The property market in the local authority areas adjacent to Sefton has also been reviewed. This has been undertaken through consultations with officers from the relevant Councils, combined with desktop analysis of the Employment Land Studies and Local Plans of those local authorities. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on the Borough's land and property market. In the case of Sefton, it is particularly important to consider the Borough's relationship to the rest of the Liverpool City Region, notably Liverpool which has strong linkages with Sefton in terms of its office market and the growing Port of Liverpool.
- 1.11 Finally, the land supply has been assessed against forecast data to understand the future need for any additional employment land. This has then been developed into a series of economic development recommendations that cover not just land, but also premises.
- 1.12 Attached at Appendix 1 is a list of all consultees.

Study Area

- 1.13 The Metropolitan Borough of Sefton covers 153 square kilometres with a population of 273,790 (2011 Census) and falls in the Liverpool City Region sub-region in North West England. The Borough is bounded by Mersey Estuary and the Irish Sea to the west and by rural West Lancashire to the east. To the south, Sefton merges with the Liverpool Conurbation (see Figure 1).

Figure 1 – Study Area



Source: ONS 2015

- 1.14 For the purposes of this Study, Sefton is divided into the north and south. North Sefton primarily comprises the towns of Southport and Formby. Southport (the largest settlement of the north) is a historic coastal resort town with a substantial retail and leisure offer, focused around the sea front and town centre. It is also a comparatively dense settlement, with further expansion constrained by the coast to the east, the Borough boundary to the north and east and by RAF Woodvale to the south.
- 1.15 South Sefton includes the communities of Bootle, Seaforth, Litherland, Netherton and Aintree which form part of the Liverpool urban area. North of these are the more distinct settlements of Crosby and Maghull. Historically, much of South Sefton thrived through dock-related industries around Bootle and Seaforth. Many of these industries fell into decline following competition from overseas, although the Port of

Liverpool remains an active local employer, with plans for further expansion.

- 1.16 In North Sefton, B1, B2, B8 employment is focused in a number of employment areas in Southport, some of which are tightly constrained by surrounding housing. B1 offices are concentrated in Southport Town Centre and at Southport Business Park. The, currently fully occupied, Formby Industrial Estate also offers a range of B-Class employment options, including some trade uses on the edge of Formby. In South Sefton employment uses are focused in Bootle, running along the Dunning's Bridge Road corridor in the east and along Derby Road in the south west. Bootle Town Centre also has a substantial office quarter.
- 1.17 A number of key transport corridors pass through the Borough. The M58 (which runs east to the M6) and the M57 (which runs south to the M62) both terminate at Switch Island in the south east of Sefton. The A5758 Brooms Cross Road, which is due to open in 2015, will improve access from Southport and Formby to Switch Island. The A565 runs the length of the Borough, from Southport to Bootle, before continuing towards Liverpool City Centre. The A59 passes through Maghull and Aintree, while the A5036 (Dunning's Bridge Road/Church Road) links Switch Island with Seaforth Docks and the A565. Merseyrail services link most of the main settlements with the rest of the Liverpool City Region and the wider North West.

Employment Land Review Guidance

- 1.18 At this stage it is worth reiterating government guidance covering employment land reviews.
- 1.19 Planning Practice Guidance (PPG) provides guidance on how Local Authorities should approach both housing and employment land reviews. Two guidance notes have been produced – *Housing and Economic Land Availability Assessment* which provides a methodology of reviewing suitable land, and *Housing and Economic Development Needs Assessments*, which provides guidance on how future needs can be determined. The assessment process takes the form of a five stage methodology under the following headings:
- **Stage 1: Identification of sites and broad locations** to provide an audit of available land of 0.25 ha and above. This is a desk top review identifying as wide a range as possible of sites and broad locations for development (including those existing sites that could be improved, intensified or changed). The outcome of this stage is to understand key employment land supply

issues and generate a portfolio of potential employment sites to take forward for more detailed review.

- **Stage 2: Site/broad location assessment** to estimate the development potential. This includes a re-appraisal of the suitability of previously allocated land and the potential to designate allocated land for different or a wider range of uses. This stage entails a qualitative review of all significant sites and premises for their 'suitability', 'availability' and 'achievability' in order to confirm which of them are unsuitable for/unlikely to continue in employment use; to establish the extent of 'gaps' in the portfolio; and if necessary, identify additional sites to be allocated or safeguarded. This exercise helps to inform whether a site is 'deliverable', 'developable' or neither. In assessing the portfolio, factors which need to be considered include:
 - *"The recent pattern of employment land supply and loss to other uses (based on extant planning permissions and planning applications). This can be generated through a simple assessment of employment land by sub-areas and market segment, where there are distinct property market areas within authorities.*
 - *Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums).*
 - *Market signals, such as levels and changes in rental values, and differentials between land values in different uses.*
 - *Public information on employment land and premises required.*
 - *Information held by other public sector bodies and utilities in relation to infrastructure constraints.*
 - *The existing stock of employment land. This will indicate the demand for and supply of employment land and determine the likely business needs and future market requirements (though it is important to recognise that existing stock may not reflect the future needs of business). Recent statistics on take-up of sites should be consulted at this stage, along with other primary and secondary data sources to gain an understanding of the spatial implications of 'revealed demand' for employment land.*
 - *The locational and premises requirements of particular types of business.*
 - *Identification of oversupply and evidence of market failure (e.g. physical or ownership constraints that prevent the employment site*

being used effectively, which could be evidenced by unfulfilled requirements from business, yet developers are not prepared to build premises at the prevailing market rents)."

- **Stage 3: Windfall assessment** Not applicable for this study as it relates to housing only
- **Stage 4: Assessment Review** ascertaining the need for economic development uses. To understand the future quantity of land required across the main business sectors; to provide a breakdown of that analysis in terms of quality and location and provide an indication of 'gaps' in supply through economic forecasting, consideration of recent trends and/or assessment of local property market circumstances. Preferred forecast methods include:
 - Sectoral and employment forecasts and projections (labour demand)
 - Demographically derived assessments of future employment needs (labour supply techniques)
 - Analyses based on the past take-up of employment land and property and/or future property market requirements.

The outcome of this stage is to provide broad quantitative employment land requirements across the principal market segments covering the LDP periods for both local authorities and an analysis of the likely 'gaps' in supply that need to be filled

- **Stage 5: Final evidence base**, the outcome of which will be the completion of the employment land review, to be taken forward in the LDP. The Review is prepared in line with this advice.

1.20 Table 1 shows how this Sefton Employment Land and Premises Study Update aligns with the Guidance. The link between the report and the PPG methodology is not always clear cut, with different sections overlapping, and indeed certain steps overlap.

Table 1 – Employment Land Reviews – PPG Guidance

Stage 1 – Site / Broad Location Identification	
Step 1 – Determine assessment area and site size	Undertaken by Sefton Council
Step 2 – Desktop review of existing information	Covered in Sections 2, 3, 4, 5
Step 3 – Call for sites / broad locations	Undertaken by Sefton Council

Step 4 – Site / broad location survey	Covered in Sections 7, 8, 9, 10
Stage 2 – Site / Broad Location Assessment	
Step 5 – Estimating the development potential in parallel with assessing suitability, availability, achievability – including viability	Covered in Sections 6, 7 and Appendices
Step 6 – Overcoming constraints	Covered in Section 6 and Appendices
Stage 3 – Windfall Assessment	
Step 10 – Determine housing / economic development potential of windfall sites (where justified)	N/A
Stage 4 – Assessment Review	
Step 11 – Review assessment and prepare draft trajectory; enough sites / broad locations?	Section 8
Stage 5 – Final Evidence Base	
Step 12 – Evidence Base and monitoring	Employment Land and Premises Study Update produced by BE Group and monitoring undertaken by Sefton Council

Source: BE Group 2015

2.0 POLICY CONTEXT

Introduction

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

National

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

- 2.2 The NPPF sets out the Government's economic, environmental and social planning policies for England, articulating the Government's vision of sustainable development. It provides a framework for the production of local and neighbourhood plans, and has replaced all the previous Planning Policy Statements and Guidance Notes.
- 2.3 In terms of business and economic development, the NPPF argues that *“Investment in business should not be over-burdened by the combined requirements of planning policy expectations. Planning policies should recognise and seek to address potential barriers to investment, including poor environment or any lack of infrastructure, services or housing.”* Local planning authorities should:
- *“Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth*
 - *Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated requirements over the plan period*
 - *Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate requirements not anticipated in the plan and to allow a rapid response to changes in economic circumstances*
 - *Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries*
 - *Identify priority areas for economic regeneration, infrastructure provision and*

environmental enhancement

- *Facilitate flexible working practices such as the integration of residential and commercial used within the same unit.”*

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

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

2.6 In town centres, local planning authorities should “*allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, community services and residential development needed.*” Local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. This applies to office development where an impact assessment should be required if the development is over a proportionate locally set threshold. The default stance is 2,500 sqm if no locally set threshold is in place. However this sequential approach does not apply to small scale rural offices or other small scale rural development.

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

2.8 The NPPF re-introduces district-wide local plans, replacing the Local Development

Framework system. The Local Plan should be a single strategic document, with supplementary planning documents only created if they can help to bring forward sustainable development at an accelerated rate.

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

2.10 Crucially, Local Plans should:

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

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

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

Sub-Regional – Liverpool City Region

Liverpool City Region Growth Plan and Strategic Economic Plan (Version 6) – Liverpool City Region Local Enterprise Partnership (2014)

- 2.12 The Local Enterprise Partnerships has three high level objectives:
- *“Growth – both in terms of absolute output (GVA) but also in jobs*
 - *Increased productivity - by being more innovative and effective in how we do business, increasing our competitiveness on the national and international stage*
 - *A rebalanced economy – with a reduced emphasis on public sector employment through a renewed focus on creating private sector jobs.”*
- 2.13 The aim is to increase the business base of the Liverpool City Region by 20,000 businesses over the next twenty years.
- 2.14 In terms of port growth, the study aim is to: *“Maximise the benefits from the £340m of private sector investment in Liverpool 2 by improving Port Access and freight connectivity and ensuring that the City Region has the sites and premises available to capitalise on the jobs and business expansion potential that will result. The City Region has an outstanding opportunity to be a Freight and Logistics Hub generating*

jobs and wealth.”

- 2.15 Improving access to the Port of Liverpool is identified as a medium-term project which is *“absolutely necessary if the economic opportunity of the City Region is to be obtained.”* The Liverpool City Region, with Government, is working to identify the appropriate solution to increase capacity to and from the Port and wish to see the project included within national infrastructure planning.
- 2.16 In July 2014, Liverpool City Region secured £232.3 million from the Government’s Local Growth Fund to support economic growth in the area – with £35 million of new funding confirmed for 2015/16 and £153.2 million from 2016/17 to 2021. This will be combined with least £30m of additional investment from local partners and the private sector to create a total pot of £262.3 million. By 2021, this Deal will create at least 10,000 jobs and allow 10,000 homes to be built
- 2.17 Two investments in strategic transport will be supported through this fund in Sefton and which further the Liverpool City Region Growth Deal priority of *“Creating a Liverpool City Region Freight and Logistics Hub.”* These are:
- Improvements to M58, Junction 1 – £5.5 million
 - Development of Maghull North Station – £6.2 million.
- 2.18 The Dunnings Bridge Road Corridor is referred to specifically within the Strategic Economic Plan Investment Pipeline document (Annex B). The Plan states that: *“There is the potential for this whole area to be reconfigured to create a coherent single industrial estate, this will require an infrastructure plan for the area to be undertaken.”*
- The Liverpool City Region: Housing and Economic Development Evidence Base Overview Study – Liverpool City Region Partners (2011)***
- 2.19 This study reviewed the development land supply across the Liverpool City Region (Merseyside, Halton and West Lancashire). It provides an understanding of development land requirements to help facilitate agreement on the distribution of housing and employment land, at both the local and sub-regional levels.
- 2.20 In the case of Sefton (along with Halton, Knowsley and West Lancashire), the land supply and demand figures shown in the Overview Study are extrapolated directly from the findings of the 2010 Joint Employment Land and Premises Study (JELPS),

completed by BE Group. The Overview Study involved no original research.

- 2.21 The study indicates that, as of December 2010, Sefton had a land supply of 57.22 ha, which is only 5.2 percent of the Liverpool City Region's total supply (see Table 2). This reflects the realistic land supply figure identified in the 2010 JELPS (57.36 ha which was based on the baseline supply picture at 1st April 2008), with some minor amendments. Employment land in Sefton is concentrated in the south, with a potential supply shortage in North Sefton.

Table 2 – Total Employment Land Requirements 2010 to 2031

Authority	Total Employment Land Supply, at December 2010*	Total Employment Land Requirements to 2031*	Land Surplus (Shortfall) to 2031
Halton	200.35	360.22	(159.87)
Knowsley	157.97	288.33	(130.36)
Liverpool	274.89	254.57	20.31
Sefton	57.22	75.85	(18.63)
St Helens	87.41	54.6	32.81
West Lancashire	49.66	135.03	(85.37)
Wirral	273.17	317.63	(44.46)
Total Core Area	1,100.67	1,486.23	(385.56)
Cheshire West and Chester	370.92 (2009 Base)	585.94	(215.02)
Chorley	84.91	4.28	80.63
Preston	106.74	-29.07	128.05
South Ribble	179.43	-56.92	236.35
Warrington	230.56	243.60	(13.04)
Wigan	171.81	335.59	(163.78)

**Adapted from individual Employment Land Review documents.*

Source: Liverpool City Region Partners 2011

- 2.22 Table 2 also suggests that Sefton will need 75.85 ha of employment land from 2010 to 2031 (3.61 ha/year). This figure is based on a land take-up calculation projected from a 15 year-plus historic trend, and includes an allowance for choice and churn. 75.85 ha represents 5.1 percent of the total employment land requirement of the Liverpool City Region (1,486.23 ha) to 2031.
- 2.23 By this measure, Sefton has a land supply shortfall of 18.63 ha to 2031, 4.8 percent of the overall shortfall of the Liverpool City Region (385.56 ha). This is a modest need when compared to many of Sefton's neighbouring local authority areas, notably

Knowsley and West Lancashire. The study notes that much of this need could be met by regeneration and remodelling of Sefton's existing Employment Areas.

2.24 The study identifies that 18.06 ha of land (23.8 percent of the total need to 2031) is needed in Sefton over the 2010 to 2016 period, while the remaining 57.79 ha will be required from 2016 onwards. In comparison 55.06 ha (96.2 percent) of the existing land supply is likely to be available over those five years, while the remaining 2.16 ha will only be available for development after 2016. Thus, while Sefton has ample land to meet its short term needs, a long-term shortfall (up to 55.63 ha) is likely.

2.25 To meet future land needs, the study looked to identify broad locations for likely future commercial development and investment, including:

- *“A general hierarchy of urban centres across the core area and wider area including recognition of those that benefit from existing critical mass of B1a high value service activity, have good and/or improving amenity provision, and those with mainline rail link. This includes the continued dominance of Liverpool City Centre in the core area and Preston in the wider area, with Warrington and Wigan further noted in this context. This is noted in addition to the other major and large towns across the core area including Birkenhead and St Helens*
- *A recognition of existing local concentrations of high value employment and business clusters generally around the M6 Corridor, Warrington, Ellesmere Port, North Liverpool/South Sefton, South Liverpool – Knowsley – Halton, Chester, Wirral, and Southport. This includes evidence to suggest localised incidences of ‘bucking the national trend’ in high value production (manufacturing) sub-sectors, with clusters noted around Liverpool, Wirral, Knowsley, Warrington, and the M6 Corridor including through Wigan to Preston*
- *The clear potential associated with the motorway network across the core area and wider area including the critical north-south M6 motorway, and key east-west intersections at Warrington, West Lancashire, St Helens, Wigan, Knowsley, Ellesmere Port, Chester, and Chorley / South Ribble as key opportunities for growth within the B8 logistics and distribution market*
- *Key Port related employment opportunities as part of the ‘SuperPort’ concept, with clusters along the banks of the Mersey in particular at Seaforth Docks,*

*Port of Liverpool, Birkenhead Docks, Cammell Laird, Eastham Dock,
Manchester Ship Canal and Weston Point.”*

- 2.26 The study also notes that, as of 2010, 23.4 percent of Sefton's existing employment floorspace is B1(a) offices, 43.6 percent is B2 general industry and 33.1 percent is B8 warehousing and distribution. Thus Sefton has a significantly higher proportion of office accommodation than the Liverpool City Region average (13.9 percent), but lower proportions of industrial (the Liverpool City Region average is 47.79 percent) and warehousing premises (the Liverpool City Region average is 38.3 percent).
- 2.27 Between 1998 and 2008 (i.e. before the recession) the amount of office space in Sefton increased by 56.6 percent, while the amount of industrial and warehousing floorspace fell by 15.4 percent and 17.1 percent respectively. The increase in office accommodation may appear to be large, but actually represents modest growth compared to neighbouring Liverpool (153.2 percent increase) and Knowsley (82.3 percent increase), although the latter will have increased from a very small base. The fall in logistics accommodation in Sefton contrasts with very large increases (65-78 percent) in Knowsley, Halton and West Lancashire.
- 2.28 If these trends were to continue in Sefton over the next 20 years then, by 2031, the proportion of office floorspace will have increased to 61.2 percent while the proportions industrial and warehousing floorspace will fall to 22.5 percent and 16.4 percent respectively. This would give Sefton the second highest proportion of office floorspace in the Liverpool City Region, after Liverpool, and the second lowest proportion of warehousing (again after Liverpool).
- 2.29 Generally, 35.7 percent of Sefton's land supply is suitable for offices, while 4.9 percent is suitable for industry and the remaining 59.4 percent can support a mix of uses. Measured against projected future trends there may be a shortage of office sites. There are also no B8 options, but evidence suggests that demand for warehousing sites will be limited.

**Liverpool City Region Superport: Market Analysis Land and Property Study
(Published Summary) – Liverpool City Region Local Enterprise Partnership
(2014)**

- 2.30 This report examines the factors that it considers will drive demand for Port related employment land and premises (and associated uses), from investment in Superport assets and capabilities, through to major changes in the global and national context.

The report then goes on to examine the current and planned supply of sites in the Liverpool City Region that could meet this demand.

- 2.31 A detailed study methodology is not provided. However, the study's findings are based on consultant knowledge, consultations and forecast modelling of demand growth across relevant port-related sectors. Two specific models created for this study were:
- A calculation of the area of space likely to be needed by a given level of trade activities
 - Likely employment generation from a given land supply.
- 2.32 Approximately £1 billion of investment in Liverpool City Region's port and logistics assets is underway. This investment *"will deliver a transformation of the sector and significantly enhance the whole region's attractiveness for retail and manufacturing logistics operations."*
- 2.33 Within the Port of Liverpool, Peel Ports have begun construction of 'Liverpool 2', which is due to be completed in 2015. This is a £300 million project which will deliver a new deep water container terminal at the Port of Liverpool, removing the vessel restrictions imposed by the current in-lock container terminal. Associated growth in road and rail freight out of the Port is envisaged.
- 2.34 Table 3 provides a breakdown of the projected employment land needs for the Liverpool City Region over the next 20 years. It includes:
- Normal (non-Port related) Economic Demand – Based on historical evidence the average demand for land in the Liverpool City Region is 10 ha/year, requiring some 200 ha over the next two decades. Economic demand for relevant areas outside of the Liverpool City Region is 2 ha/year, requiring an additional 40 ha
 - Port-Centric (i.e. container based) Demand – Calculated from the estimated future throughput of containers at the Port of Liverpool, reflecting the fact that Liverpool 2 will double capacity within the Royal Seaforth Docks. The report considers two scenarios for the movement of goods which impact on the demand for land:
 - A road based scenario assuming some 2 million containers move through the Port annually, generating a 20 year requirement for 54 ha of land (Modal split – 70 percent by road, 15 percent by short sea

- journey, 10 percent by canal and 5 percent by rail)
- A rail based scenario assuming some 2 million containers move through the Port annually, generating a 20 year requirement for 39 ha of land (Modal split – 50 percent by road, 25 percent by rail, 15 percent by short sea journey and 10 percent by canal).
- RO RO – Liverpool is the main port for trade between Great Britain and Ireland and handles more than 30 percent of all freight on this route. RO RO at Liverpool is heavily reliant upon unaccompanied trailers which account for around two-thirds of the trade. The land requirement generated by this traffic is very port centric, being needed in or adjacent to the port itself. Some 513,000 such units were handled by the Port in 2008 growing to 757,000 in 2020 and to just over 1 million by 2030 generating demand for an additional 32 ha of land
- Trade Cars – Liverpool shipped 33,500 cars in 2012, an assumed UK market share of 28 percent. The 2012 outturn implies a growth rate of around 73 percent per annum between now and 2020 and the forecast requirement for an additional 12 ha over the next 20 years
- Non-Unitised Cargos – More likely to pass through Garston, Bromborough and Port Weston, rather than the Port of Liverpool, but will generate demand for a further 26 ha over the next 20 years
- Complementary Sectors – These include low carbon, offshore and processing activities and generate a forecast total of 104 ha over the next 20 years
- Secondary demand – According to the assumptions on the volumes using road and rail respectively, this generates a requirement of 330 – 340 ha of land over the next 20 years.

Table 3 – Overall Demand for Additional Land

	Estimated Demand for Additional Land, ha				
	0-5 Years	6-10 Years	11-15 Years	16-20 Years	Total
Economic Demand	60	60	60	60	240
Port-Centric Warehousing					
Scenario 1 - Road	13	14	11	16	54
Scenario 2 - Rail	11	10	5	13	39
RO RO*	8	8	8	8	32
Cars	3	3	3	3	12
Non-Unitised Cargos	4	11	2	9	26
Complimentary Sectors	-	76	-	28	104

	Estimated Demand for Additional Land, ha				
	0-5 Years	6-10 Years	11-15 Years	16-20 Years	Total
Secondary Demand					
Scenario 1 - Road	85	85	83	87	340
Scenario 2 - Rail	83	83	79	85	330
Total					
Scenario 1 - Road	173	257	167	211	808
Scenario 2 - Rail	169	251	157	206	783

Source: Liverpool City Region Local Enterprise Partnership, 2014

*Roll-on/roll-off (RO RO) ships are vessels designed to carry wheeled cargo, such as automobiles, trucks, semi-trailer trucks, trailers, and railroad cars, that are driven on and off the ship on their own wheels or using a platform vehicle, such as a self-propelled modular transporter. This is in contrast to Lift-on/Lift-off (LO LO) vessels, which use a crane to load and unload cargo.

- 2.35 Overall this equates to a requirement for some 783-808 ha over the next 20 years. If wholly port based uses are excluded (i.e. RO RO, Trade Cars, Non-Unitised Cargos and Complimentary Sectors – 174 ha), this gives a net requirement of 634 ha for logistics and manufacturing, of which 418 ha will be required for logistics and 216 ha for manufacturing.
- 2.36 This assumes an 80:20 split between logistics and manufacturing requirements for land. However, given the strength of manufacturing in the region and the resurgence in onshore manufacturing, the report considers that demand from this sector may be higher. A 60:40 logistics to manufacturing split could add a further 104 ha to this demand.
- 2.37 The study then looked at land supply in the sub-region, identifying available sites of greater than 5 ha in size, within 1 hour drive time from the Port of Liverpool. This includes land within the local authority areas of:
- Cheshire West and Chester
 - Halton
 - Knowsley
 - Liverpool City
 - Sefton
 - St Helens
 - Warrington
 - West Lancashire
 - Wirral.

2.38 Overall some 851.54 ha of land in 69 sites of greater than 5 ha each is identified, within this area. Of the 69 relevant sites identified in the study, 12 are considered to be high quality immediately available sites covering 233 ha of land. This is considered sufficient to meet the 158 ha of land needed over the next five years (200 ha with 25 percent headroom). Key sites include:

- 3MG (Halton) – 90 ha rail connected site including Stobart Park and HBC Field
- MN2.47(b): Atlantic Park (Sefton) – 16.75 ha mixed use business park
- Stonebridge Business Park/Stonebridge Cross (Liverpool) – 20 ha distribution site
- Knowsley Industrial Park (Knowsley) – 21.7 ha including Potter Logistics Rail Terminal
- Omega South (Warrington) – 48 ha (only Phase 1 and 2 land identified in this study)
- Site adjoining M62 Parkside (St Helens) – 100 ha Strategic Rail Freight Interchange
- Port Bridgewater (Cheshire West) – 18.6 ha inland rail connected logistics site
- West Float (Wirral) – 24.3ha including International Trade Centre site and supply park
- XL Business Park (West Lancs) – 11.2 ha extension site in Skelmersdale.

2.39 Longer term, the report concludes that demand for logistics and manufacturing facilities (excluding specific port based requirements) is estimated at 634 ha (net), across the 1 hour drive time study area, over the 20 year period. It suggests that whilst total supply of sites is 851 hectares, almost three quarters (618 ha) is constrained through availability or physical factors. In order to be competitive in the logistics market, the Liverpool City Region needs a good available supply of large high quality sites suitable for logistics clusters. Based on these findings a further 400 ha on high quality sites (500 ha to provide 25 percent headroom) is therefore required over the next 20 years.

Local – Sefton

Sefton Unitary Development Plan – Sefton Council (2006)

2.40 The Sefton Unitary Development Plan (UDP) was adopted in June 2006. From June

2009, most UDP policies (including all employment policies) will be saved until they are replaced by adopted Local Plan policies.

2.41 Policy CS3 sets out a number of general development principles which will be applied in the consideration of all development proposals:

- *“Development will provide for a choice of means of transport to and within the site, giving priority to pedestrians, cyclists and public transport users.*
- *Development would not be permitted if it would:*
 - *Compromise road safety by site access or internal circulation issues*
 - *Cause significant harm to amenity, or to the character or appearance of the surrounding area*
 - *Create risk to people and property as a result of flooding, air or water pollution, land contamination, or noise or light nuisance*
 - *Prejudice the comprehensive development of the area.”*

2.42 *“Significant weight will be attached to the quality of building and site design and layout, in particular for development which would be prominent because of its scale or location. The design of development shall have regard to:*

- *The needs of people who have disabilities*
- *The need for efficiency in the use of water, land and of non-renewable resources, including natural resources and energy*
- *The need to make the proposal as sustainable as practicable.*
- *Planning conditions and legal agreements will be used where appropriate to make the most of the social, economic and environmental benefits of development.”*

2.43 Policy EDT1 identifies six Strategic Employment Locations that are priority areas for development and regeneration funding to support key economic sectors and safeguard local employment. The following four are relevant to employment land use:

- Port and Maritime Zone, Bootle – port linked development in distribution and manufacturing
- Dunnings Bridge Corridor/Netherton Industrial Areas – priority for large-scale light and general industrial and office development
- Central Bootle – office development

- Southport Business Park – small and medium sized light industrial, office and business development.
- 2.44 In Central Southport the priority will be retail, public services, tourism-related services and commercial development which benefit from an accessible location while on Southport Seafront the priority will be major indoor and outdoor tourism and leisure-related development.
- 2.45 Policy EDT2 sets the framework for employment land provision (both strategic and local employment) for the period 2002-2017. Within the Strategic Employment Locations provision is made for up to 83 ha of land plus sites within Bootle Office Quarter that would generate up to 65,650 sqm of office floorspace. A further 5.1 ha of land is allocated in Primarily Industrial Areas.
- 2.46 42.7 ha of land represents three sites in the Atlantic Gateway Strategic Investment Area. All three are in the Dunning's Bridge Corridor (MN2.47(a): former Peerless Refinery; MN2.47(b): Atlantic Park; MN2.47(c): Senate Business Park/Girobank). Although the gross area of these three sites totals 42.6 ha, this is netted down in Policy EDT2 to 30.8 ha to reflect areas currently occupied. The fourth site is Southport Commerce Park (Policy EDT4), now MN2.50: Southport Business Park, comprising 11.9 ha.
- 2.47 Policy EDT11 specifically refers to land adjacent to St John's House, Merton Road, as being allocated to deliver up to 35,000 sqm of office space. There is no specific description to show where the remaining proposed 30,650 sqm will be provided, although reference is made in Policy EDT12 to two mixed-use sites. One adjoins The New Strand Shopping Centre; the other is described as land at Strand Road/East of Stanley Road.
- 2.48 Policy EDT2 refers to 28.3 ha of allocated sites within the Primarily Industrial Areas identified in Policy EDT6. Eight of these sites also fall within the Dunning's Bridge/Netherton Industrial Areas, which form part of the Atlantic Gateway Strategic Investment Area. These are included in Table 4, which sets out the Strategic Employment Locations' sites.
- 2.49 Policy EDT5 refers to designated Primary Industrial Areas, which are seen to be continuing as the main focus for new business, light and general industry in Sefton. They include the Strategic Employment Locations. Many are in need of

comprehensive redevelopment, playing a key role in aiding regeneration, particularly in the south of the Borough. Table 5 schedules the eight sites, identified in Policy EDT6, that do not fall within a Strategic Employment Location.

Table 4 – Sefton Strategic Employment Locations Sites

Site	Site Ref	Area, ha
Former Peerless Refinery, Dunnings Bridge Road	EDT3.1	6.8*
Atlantic Park, Dunnings Bridge Road	EDT3.2	18.2*
Senate Business Park/Girobank	EDT3.3	15.6*
Southport Commerce Park	EDT4	11.9
Land South of Deltic Way, Aintree	EDT6.3	0.9
Former Vestey site, Netherton	EDT6.4	6.8
Rear, Atlantic Industrial Estate, Netherton	EDT6.5	2.6
Farriers Way, Netherton	EDT6.7	0.5
Norwest Holst, Netherton	EDT6.8	5.3
Land, South of Heysham Road, Netherton	EDT6.9	1.8
Linacre Bridge, Bootle	EDT6.10	0.9
Former Parcel Force Site, Netherton Way	EDT6.11	9.5
Land Within Port & Maritime Zone		12.0
TOTAL		82.0

Source: Sefton Council, 2006.

* These areas netted down to total of 30.8 ha for inclusion in 82.0 ha total

Table 5 – Sefton – Primarily Industrial Area Site Allocations*

Site	Site Ref	Area, ha
Land east of Brasenose Road, Bootle	EDT6.1	0.2
Units 1-6 Pacific Road, Bootle	EDT6.2	0.2
Rear, South Sefton Business Centre, Bootle	EDT6.6	0.7
Former Sewage Works, Maghull	EDT6.12	0.6
Stephenson's Way, Formby	EDT6.13	0.4
Crossens Way, Southport	EDT6.14	1.5
Butt Lane/Foul Lane, Southport	EDT6.15	1.0
Cobden Road, Southport	EDT6.16	0.5
TOTAL		5.1

Source: Sefton Council, 2006.

*Excluding Strategic Employment Locations.

2.50 Policy EDT7 notes that “development within the Primarily Industrial Areas, other than minor alterations to existing premises, will only be permitted:

- *Where the proposal does not harm the amenity of any nearby residential area*
 - *Where, if the opportunity arises, the proposal helps to improve the general environment of the area.”*
- 2.51 *“Development in the following locations should, where appropriate, help to enhance the environmental quality of, and restructure, these industrial areas:*
- *EDT 7.1 Orrell Mount, Bootle;*
 - *EDT 7.2 Land adjacent to Acorn Way, Bootle;*
 - *EDT 7.3 Heysham Rd, Netherton;*
 - *EDT 7.4 Crowland St, Southport;*
 - *EDT 7.5 Sefton Lane, Maghull; and*
 - *EDT 7.6 Formby Industrial Estate.”*
- 2.52 Proposals to extend or change the use of existing business and industrial premises outside the Primarily Industrial Areas will only be permitted where they *“will not significantly harm the amenity of the surrounding area” (Policy EDT8).*
- 2.53 Within the Port and Maritime Zone (The Port of Liverpool and surrounding area, as defined on the UDP Proposals Map) Policy EDT9 indicates that the following development is acceptable in principle:
- *“Warehousing, light and general industry (B8, B1, B2) uses, including the open storage of materials and temporary uses, which directly serve port operations or require a port location*
 - *Port-related infrastructure, including rail facilities, power generation and waste management facilities, required for the safe and efficient operation of the Port*
 - *Other types of development where there is a strong justification for location within the area because of their special nature or scale, and which would not prejudice the future development of the Port.”*
- 2.54 Development generating large movements of freight should wherever practicable be served by a rail link.
- 2.55 Policy EDT17 identifies three ‘Employment Opportunity Sites’ suitable in whole or in part for B1, B2, B8 uses:

- Land south of Aintree Curve, Netherton (3.8 ha), seen as suitable for employment uses – but also for housing
- Linacre Lane Gasworks, Bootle (4.7 ha) – but also seen as suitable for residential uses
- Land bounded by Hawthorne Road/Linacre Lane/Aintree Road/Vaux Crescent (10.5 ha) – but also seen as suitable for housing, the land has been re-designated in the emerging Local Plan (discussed below) to include a housing allocation and partly as a Primarily Industrial Area.

2.56 Policy EDT18 notes that proposals for non-employment uses which involve the loss of employment land and/or buildings will only be permitted where it can be demonstrated that the proposal:

- *“Would not result in the loss of employment or buildings of a type for which there are insufficient alternatives available locally*
- *Would fully compensate for the permanent loss of the site for employment generating uses*
- *Would replace an employment use that is seriously detrimental to local amenity and the local environment.”*

2.57 In addition, the following policies have been noted as of relevance to retail, leisure and other town centre uses. They will be borne in mind for this Employment Land and Premises Study Update, for as long as they remain active planning policies in Sefton, but are not reviewed in detail here:

- Policy EDT 12: Bootle Central Area Opportunity Sites
- Policy EDT 13: Southport Central Area Development Principle
- Policy EDT14: Southport Resort Area
- Policy EDT 15: Southport Seafront Area
- Policy EDT 16: Mixed Use Areas
- Policy R1: Retail Development Strategy
- Policy R2: Southport Town Centre
- Policy R3: Southport Station Complex
- Policy R4: Bootle Town Centre
- Policy R5: Edge-Of-Centre Retail Development: Tavr Site, Strand Road, Bootle
- Policy R6: Development In District And Local Shopping Centres
- Policy R7: Local Shopping Parades

- Policy R8: Upper Floors In Defined Centres And Shopping Parades
- Policy R9: Edge-Of-Centre And Out-Of-Centre Retail Developments And Key Town Centre Uses
- Policy R10: Lanstar Site, Church Rd, Litherland

A Local Plan for Sefton: Submission Draft – Sefton Council (2015)

- 2.58 The Local Plan was approved by Council for publication in January 2015, and the publication period ran from January to 27 March 2015. The Local Plan was submitted for examination in on 3rd August 2015.
- 2.59 Reflecting the NPPF, Strategic Policy SD1 identifies a ‘Presumption in favour of sustainable development’. Specifically, *“Planning applications that accord with the policies in this Local Plan (and, where relevant, with policies in Neighbourhood Plans) will be approved, unless material considerations indicate otherwise.*
- 2.60 *Where there are no policies relevant to the proposed development, or relevant policies are out of date at the time of making the decision, the Council will grant permission unless material considerations indicate otherwise, taking into account whether:*
- *Any adverse impacts of granting permission would significantly and demonstrably outweigh the benefits, when assessed against the policies in the National Planning Policy Framework taken as a whole*
 - *Specific policies in the Framework indicate that development should be restricted.”*
- 2.61 Policy MN1: Housing and Employment Requirements Locations sets a Borough-wide employment land target of 84.5 ha for the period 2012-2030. New employment development will be delivered on the following types of land:
- a) *“Strategic Employment Locations*
 - b) *Employment Allocations*
 - c) *Land within Primarily Industrial Areas*
 - d) *Sites with planning permission for employment development*
 - e) *Other suitable sites in Sefton.”*
- 2.62 Policy MN2: Housing, Employment, and Mixed Use Allocations identifies five Strategic Employment Locations:

- MN2.46: Land East of Maghull – 20 ha (net)
- MN2.47: Dunnings Bridge Road Corridor, Netherton (MN2.47(c): Senate Business Park, MN2.47(b): Atlantic Park, and the MN2.47(a): former Peerless Refinery Site) – 26.8 ha
- MN2.48: Land to the North of Formby Industrial Estate – 8 ha (net)
- MN2.49: Land to the South of Formby Industrial Estate – 7 ha.

2.63 *“Other uses will only be permitted on these sites where they are:*

- *Necessary to cross subsidise the provision of B1, B2 and B8 uses on the majority of the site; or*
- *Small scale and intended primarily to serve other businesses operating on the Business Park.”*

2.64 Southport Business Park (13.1 ha) is also allocated as a Strategic Employment Location for new office and light industrial uses (B1) (designated as MN2.50). *“Other uses will only be permitted on this site where they are:*

- *Main car dealerships, gymnasias, veterinary, or healthcare uses in the north east quadrant of the site fronting onto Town Lane (Kew)*
- *Small scale and intended primarily to serve other businesses operating on the Business Park.”*

2.65 The Switch Car Site (MN2.51), Wakefield Road, Netherton (4.7 ha) and Land at Farriers Way (MN2.52), Netherton (0.5 ha) are also identified as employment allocations within the defined ‘Primarily Industrial Areas’ of Dunnings Bridge Road. Within Bootle, the former Lanstar Site, Hawthorne Road (MN2.53) and Land at Linacre Bridge, Linacre Lane (MN2.54) are also identified as allocations. The latter two sites are 1 ha each in size.

2.66 Looking at the main strategic sites, Policy MN3: Strategic Mixed Use Allocation - Land East of Maghull identifies that the development of the site must provide:

- A minimum of 1,400 dwellings
- A 20 ha (net) serviced B1/B2/B8 Business Park
- Local shopping provision of an appropriate scale to serve the needs of the new community
- Appropriate new public open space, incorporating a neighbourhood park, equipped play area, new habitat creation, and provision for outdoor sports

- A landscaping network including tree planting, buffer zones between employment and housing areas and to the M58 motorway and railway, the strategic paths and cycle routes network
- A layout that facilitates a bus route across the site from School Lane in the north to Poverty Lane in the south
- Walking and cycling routes within and beyond the site linking new residential areas and Business Park to the railway stations, bus services, new local centre, open space, and local schools.

2.67 Policy MN4: Land North of Formby Industrial Estate identifies this location for B1/B2/B8 uses. Subject to a full financial appraisal, the development of a limited number of other uses on part of the site may be acceptable where they are necessary to cross subsidise the delivery of the B Class floorspace. The site will be accessed by means of a dedicated signal controlled junction off the Formby Bypass.

2.68 Policy MN5: Land South of Formby Industrial Estate identifies this location as suitable for:

- A new sports ground and facility capable of accommodating a re-formed Formby Football Club
- A minimum of 5 ha of sports and recreation facilities in the eastern half of the site
- A minimum of 7 ha net (10 ha gross) of employment land on the western half of the site. Subject to a full financial appraisal, the development of a minimum amount of other development on this part of the site may be acceptable where they are necessary to cross subsidise the delivery of B-Class uses. *“Any uses necessary to cross subsidise the delivery of a serviced business park for B1, B2 and B8 uses must be phased so that proposed business park and sport and recreation uses are delivered in tandem with uses that are cross-subsidising it”*
- New accesses onto the Formby Bypass and Altcar Road.

2.69 Policy ED1: The Port and Maritime Zone notes that *“Development and re-structuring will be permitted in the Port and Maritime Zone including the expansion of the operational port area to the A565 (Derby Road, Rimrose Road and Crosby Road South), provided that the following criteria are met:*

- *The development is a port-related activity and does not prevent the*

comprehensive redevelopment of the area for such purposes

- *Buildings are suitably designed so that they integrate into and respect the surrounding natural, built and historic environment*
- *Appropriate landscaping and/or screening and other forms of mitigation are provided to minimise the impact of the development on sites which abut the landward edge of the Port and Maritime Zone*
- *The development is designed to encourage walking and cycling, and has incorporated, where possible, water and rail as alternatives to road transport.”*

2.70 The expansion of the Port onto all or part of the Seaforth Nature Reserve will not be permitted unless the proposals demonstrate that there are:

- *“No alternative sites available, and ‘imperative reasons of overriding public interest’ as to why the development should be permitted in this location*
- *Provide suitable compensatory habitat and necessary mitigation for an appropriate period to end once monitoring confirms that the compensatory habitat is performing a function identical to that of Seaforth Nature Reserve*
- *Demonstrate that there are no likely significant effects on the Liverpool Bay Special Protection Area or other internationally important nature sites.”*

2.71 *“Improvements to access will be required to support the expansion of the Port. This may require a new road and /or substantial improvements to the surrounding highway network beyond the Port area, as well as other modes of transport.”*

2.72 Policy ED2: Development in Town Centres, District Centres, Local Centres and Local Shopping Parades and outside Defined Centres identifies the settlement hierarchy for the development of retail, leisure and other main town centre uses in Sefton as:

- Town Centres: Bootle and Southport
- District Centres: Crosby, Formby, Maghull and Waterloo
- Local Centres: Ainsdale, Birkdale, Churchtown, Netherton and Old Roan.

2.73 Sequential testing and impact assessment will be required for developments outside of these centres.

2.74 Policy ED3: Primarily Industrial Areas identifies that Sefton’s Primarily Industrial Areas are *“suitable for the following types of uses:*

- *Office and light industrial uses*

- *General Industrial uses*
- *Storage and distribution uses.*

2.75 *Other uses will only be permitted where they:*

- *Are small scale or ancillary to the above uses*
- *Maximise job outputs and are compatible with the character and function of the area and with adjacent uses.*

2.76 *Development within the Primarily Industrial Areas must not:*

- *Significantly harm the amenity of any nearby residents*
- *Significantly harm the general environment.”*

2.77 Land bounded by Hawthorne Road/Linacre Lane/Aintree Road and Vaux Crescent has been re-designated in the Local Plan to include a housing allocation (site MN2.43, 2.9 ha) and partly as a Primarily Industrial Area under Policy ED3.

2.78 Policy ED4: Mixed Use Areas identifies six locations which are suitable for office and light industry, health and educational uses, civic and community facilities, and other uses that complement the character of the area. These are:

- Bootle Central Area
- Land at Crosby Road North, Waterloo
- Land at Copy Lane, Netherton
- Land to the West of Ormskirk Road, Aintree
- Switch Island, Aintree
- Land at Hawthorne Road /Church Road, Bootle.

2.79 Residential development may be permitted where an acceptable residential environment can be achieved.

2.80 Policy ED6: Regeneration Areas identifies the Council’s priorities for regeneration. These are outlined in Table 6.

Table 6 – Regeneration Areas

Area	Regeneration Priorities
Bootle Central Area	<ul style="list-style-type: none"> • The refurbishment, re-use or redevelopment of vacant office blocks and other vacant /under-used land for appropriate new uses, consistent with Policy ED4 ‘Mixed Use Areas’

Area	Regeneration Priorities
	<ul style="list-style-type: none"> • The refurbishment and re-use of Listed and historic buildings in and around Bootle Town Hall • The focussing of new retail development within Bootle Town Centre • The development of new restaurants, leisure facilities, hotels, and other appropriate uses within the Central Area • The expansion of Hugh Baird College and its campus • The development of new buildings of an appropriate scale and mass on the Stanley Road frontage • Site 501 – 509 Hawthorne Road, Bootle (5.2 ha) suitable for housing development. Partial development for other uses will be permitted where this does not prevent the development of the remainder of the site for housing, and where the proposed uses are compatible with a residential environment • Former Gasworks Site, Marsh Lane, Bootle (6.3 ha) will also be redeveloped for uses appropriate to its area.
Regeneration of Centres	<p>Development within the following centres should make a positive contribution to the regeneration of the centre:</p> <ul style="list-style-type: none"> • Central Southport • Crosby Centre • Maghull Centre • Seaforth Centre. Proposals that support the following regeneration objectives will be acceptable in principle: <ul style="list-style-type: none"> ○ The consolidation of the existing shopping area ○ The introduction of complementary uses supporting the retail function ○ The redevelopment and positive re-use of vacant and /or derelict land and buildings.
Dunnings Bridge Road Corridor	<ul style="list-style-type: none"> • The development of the three Strategic Employment Sites within the Corridor • The redevelopment of the Heysham Road Industrial Estate to provide modern employment premises and environmental enhancements • The development of land to support the expanded Port.

Source: Sefton Council, 2015.

2.81 In addition, the following policies have been noted as of relevance to retail, leisure and other town centre uses. They will be borne in mind for this Employment Land and Premises Study Update, but are not reviewed in detail here:

- Policy ED5: Tourism
- Policy ED7: Southport Central Area
- Policy ED8: Southport Seafront

- Policy ED9: Crosby Centre.

Employment Land and Premises Study Refresh – Sefton Council (2012)

- 2.82 This report assessed the supply, need and demand, for employment land and premises (Use Class B) in the Borough of Sefton to 2031. Undertaken by BE Group, the study refreshed the Sefton-specific elements of the 2010 JELPS and comprised three main objectives:
- *“An assessment of Sefton’s economy to inform the amount, location and type of employment land and premises required to facilitate development and growth*
 - *A review of the current portfolio of employment land and premises within the Sefton local authority area*
 - *Recommendations on the future allocations of employment land and premises to maintain the Borough’s economic growth.”*
- 2.83 The study also considered the identified expansion needs of the Port of Liverpool, particularly the Port’s future land requirements in the Regent Road/Derby Road Corridor, Bootle.
- 2.84 Private sector commercial property agents, consulted for the study (which was written during a period of recession) reported that generally industrial need far outweighed that for offices. Agents were particularly pessimistic about the South Sefton office market. The strongest demand was for industrial units of 0-464 sqm and offices of 0-186 sqm. There were also some larger (557 sqm or more) industrial/warehouse requirements, from Merseyside firms looking for units in South Sefton.
- 2.85 Twenty two Employment Areas and Opportunity Sites have been reviewed. These provide a total of 345.69 ha of employment land, of which 48.24 ha (14 percent) has been identified as representing options for the future change and improvement of Sefton’s land supply.
- 2.86 At 31st March 2012 there was a headline supply of 57.96 ha of employment land, made up of 18 sites. This reduced to 53.78 ha (15 sites) when constrained sites were excluded. Around three quarters of this land was in South Sefton, primarily at MN2.47(b): Atlantic Park and the wider Bridle Way Employment Area (25.29 ha).

2.87 The study identified that an additional 23.50 ha was required based on past take-up rates. The other three forecast models (employment, labour supply and a ‘policy on’ scenario) suggested the Borough has an oversupply of employment land. This would mean that much of the current land supply is surplus to requirements and could be used for other activities. However, these methods take no account of pent-up demand, failures in the property market, land lost to housing developments and other non-employment uses, or the additional 2.63 ha requirement identified by the Port of Liverpool, needed to decant non-port related businesses from within the port expansion area, discussed further below. Adjusting the past take-up figure to take account of these factors increased the identified need to 30.76 ha (see Table 7).

Table 7 – Trend Based Forecast of Land Take-up – Additions/Deductions Adjusted

Overall Land Requirement (Historic Take-Up Rate), ha	Additions (Deductions), ha	Adjusted Figure, ha
+23.50	<p>(5.13) Oversupply based on 7.5 percent vacancy rate for total property stock</p> <p>9.76 Land lost to housing (former HMRI) development</p> <p>2.63 Additional land needs resulting from the displacement of businesses, from Regent Road/Derby Road, due to Port expansion</p>	+30.76

Source: **BE Group** 2012

2.88 Recommendations made by this Employment Land and Premises Study Refresh, and relevant to this study, include that:

- The Council should allocate a further 31 ha of employment land for the period 2012-2031.
- To help meet this need, the Council should undertake a review of the Regeneration Opportunities identified in this study to determine how many are likely to come forward over the plan period. As these are unlikely to meet the full requirement, the Council should also consider options for the release of Green Belt land for future business park developments in both North and South Sefton,
- The Council should continue to exclude port-related land from the identified land supply. The Council also needs to maintain a dialogue with Peel Ports regarding its land requirements at the Port of Liverpool.
- Atlantic Industrial Complex, MN2.47(a): former Peerless Refinery and MN2.47(c): Senate Business Park should be safeguarded for B-Class uses and other employment uses which achieve economic enhancement.
- For Sefton's other allocated employment sites and land/premises in 'Primarily Industrial Areas' a more flexible approach could be taken to help facilitate a broad range of economic development.
- However, Sefton Council should continue to protect employment sites and 'Primarily Industrial Areas' from non-employment uses, such as housing, unless wholly exceptional circumstances can be demonstrated. If employment sites (allocations) are lost to other uses, then an equivalent amount of land should be identified elsewhere to ensure a sufficient overall land supply in Sefton
- Sefton Council should identify a successor to Southport Business Park early in the Local Plan period (from 2016 onwards). There are no appropriate brownfield sites in North Sefton and a successor can only be provided through the release of Green Belt land. The recommended successor site is Formby Moss, north of Formby Industrial Estate. If this site cannot be delivered due to constraints, then the Council should explore whether another site in this area can be identified.
- In South Sefton, a Green Belt release should be considered for the post 2020 period.
- Sefton Council should undertake an appraisal of the supply and demand for managed workspace and serviced offices within the Borough.

- Given the strength of continuing demand for freehold industrial units, there should be sites set aside to provide small freehold development plots for owner-occupiers.
- Both Sefton and Liverpool need to work together to monitor and plan for the sub-regional land needs arising from the Port of Liverpool's expansion plans and the impacts of Liverpool Waters.

Implications of the 'Mersey Ports Masterplan' for Employment Land Provision in Sefton – Sefton Council (2012)

- 2.89 This study was undertaken, by Sefton Council Officers in mid-2012, to identify “*the potential implications of the 'Mersey Ports Master Plan'* [now no longer considered an up to date context document for the Port and not reviewed in this Section] *for employment land provision in Sefton.*” It was intended to support the Employment Land and Premises Study Refresh, discussed above, by identifying the Port's future employment land needs.
- 2.90 The Regent Road/Derby Road area of Bootle is the focus of this study. This area of land extends southwards across the Sefton boundary and into North Liverpool and was designated Area of Change L5 in the Mersey Ports Masterplan. Identified as being 37 ha in size, this reduces to 22.24 ha once land already owned by Peel Ports, and/or in port related use is excluded. Excluding vacant land and property, this further reduces to 13.16 ha (7.42 ha in Sefton, 5.74 ha in Liverpool).
- 2.91 The 13.16 ha is currently occupied by a significant number of small and medium sized businesses. If the land is to be acquired by the Port to facilitate expansion, then any businesses dislocated may create additional demand for employment land elsewhere. However, forecasting the land need generated by these businesses is not straightforward for several reasons:
- Uncertainties about whether the Port will be able to acquire all of the land within the L5 area (some owners may be unwilling to sell)
 - Some sites may prove unusable by the port, being too small, irregularly shaped, contaminated, or otherwise constrained
 - A proportion of the businesses may cease trading altogether once their premises are acquired by the Port
 - Other businesses could be relatively footloose and may seek to relocate away from the immediate area.

2.92 Businesses that wish to remain in the local area are likely to look for premises in both Liverpool and Sefton. As Table 8 shows, 80 percent of the designated employment land in a 1-2 km radius of the L5 area is within Liverpool. In addition, one of the key advantages of the L5 area – its proximity to Derby Road – is also common to much of the nearby industrial land in Liverpool.

Table 8 – Primarily Industrial Areas near to L5, ha

	Within 1 km	Within 2 km	Within 3 km
Sefton	27.43	40.89	52.49
Liverpool	109.69	172.91	186.99

Source: Sefton Council, 2012

2.93 As is discussed above, the precise land requirements arising from Port expansion into the L5 area are subject to a number of uncertainties. However, based on the availability of land and premises in the surrounding area, this study assumes that 20 percent of the businesses within L5 will seek alternative premises within Sefton. This gives an estimated land requirement of 2.63 ha. This additional land need is considered further in Section 8.0. Liverpool City Council have agreed that the remaining 80 percent (10.52 ha) will be incorporated within their employment land requirement.

Sefton Economic Strategy 2012-22 – Sefton Council/Sefton Borough Partnership (2012)

2.94 The vision of this strategy is to create *“An economy that connects Sefton to the City Region and beyond, in which businesses, employees, jobseekers and working age adults receive the help they need, and the benefits of growth are maximised for the people and places of the Borough”*. To achieve this vision, five Strategic Objectives have been created:

- *“More new starts to replenish the business population*
- *Grow existing businesses and stimulate productivity*
- *Target traditional and emerging growth sectors*
- *Create conditions for growth*
- *Increase opportunity and employment.”*

2.95 Relevant tasks, associated with each of these objectives are highlighted in Table 9.

2.96 The Economic Strategy also identifies five ‘transformational sectors’ to drive growth in the Borough. These are:

- *Mersey Ports* – maritime cluster of port-related businesses, port-centric logistics and landward infrastructure
- *Visitor Economy* – Southport’s tourism/leisure offer, new public/private partnership
- *Knowledge Intensive Businesses* – advanced manufacturing, digital skills & enterprises, financial & professional services
- *Low Carbon Economy* – retrofitting homes and businesses, low emission transport, sustainable energy generation, offshore wind, local supply chains
- *Construction* – underpinning industry to all growth sectors.
-

Table 9 – Objectives and Tasks

Objective	Tasks	Comments
More new starts to replenish the business population	<ul style="list-style-type: none"> • Increase start-up and survival rates • Promote an enterprise culture. 	<p>Actions associated with this Objective include to:</p> <ul style="list-style-type: none"> • Develop business growth sectors, networks and clusters to maximise exchange of information, and create trade and investment opportunities.
Grow existing businesses and stimulate productivity	<ul style="list-style-type: none"> • Avert closures and retain capacity • Sustain and grow existing businesses • Diversify business base – rural economy, social enterprises • Attract new inward investment. 	<p>Actions associated with this Objective include to:</p> <ul style="list-style-type: none"> • Respond and develop inward investment interests and opportunities • Improve the competitiveness of farms and rural businesses including diversification.
Target traditional and emerging growth sectors	<p>Assist in the growth of:</p> <ul style="list-style-type: none"> • Superport • Low Carbon Economy • Knowledge-Intensive Businesses. 	<p>Specific ‘Superport’ proposals which affect Sefton include:</p> <ul style="list-style-type: none"> • A £300 million deepwater river terminal and container port expansion planned for 2014 • The proposed use of the Seaforth Nature Reserve for port-related purposes (subject to adequate compensatory habitat elsewhere) • Creation of the Liverpool Intermodal Freeport Terminal (Phase II) between Regent Road and Derby Road (providing about 34,000 sqm of warehousing) • Regent Road/Derby Road corridor – acquisition of further land to support port centric businesses. <p>The Low Carbon Economy has the potential to generate 12,000 jobs across the Liverpool City Region between 2011 and 2016. Partners should support this sector offering (among other things) generic assistance (finance, marketing, sites, premises etc), and access to appropriate third-party specialists. They should also support major (low carbon economy) companies towards locating in prime Sefton industrial sites, particularly M2.47(b): Atlantic Park and the rest of the Dunnings Bridge Road Corridor.</p> <p>Clustering of knowledge economy businesses should be encouraged at Southport Business Park, to make the most of the transatlantic fibre optic cable at Hibernia and the existing group of Financial and Professional Services firms.</p>
Create conditions for growth	<ul style="list-style-type: none"> • Strategic Regeneration Frameworks • Bring forward land for 	<p>The Council will undertake to “<i>deliver effective regulatory services that expedite development and ensure high quality decision-making.</i>” It will also work to deliver new investment in</p>

Objective	Tasks	Comments
	employment <ul style="list-style-type: none"> • Improve access to employment zones • (Create) ubiquitous broadband and energy infrastructures. 	Southport and North Liverpool/South Sefton, in particular maximising employment opportunities associated with the Port of Liverpool expansion.
Increase opportunity and employment	-	-

Source: Sefton Council/Sefton Borough Partnership, 2012

Local Plan and Community Infrastructure Levy Economic Viability Study – Sefton Council (2014)

2.97 This study was commissioned by the Council to “consider the cumulative impact of the proposed Local Plan Policy requirements on viability and deliverability, and to make recommendations concerning the overall compatibility of such policies with deliverability.” It also assesses the prospects for the introduction of a Community Infrastructure Levy (CIL) in the Borough.

2.98 It should be noted that in preparing the baseline viability assessments, this study has adopted the Residual Valuation Approach. “This is where the value of the completed development is assessed and the cost of undertaking the development (including the cost of land, finance and planning obligations) is deducted, along with a target developer’s profit return. The residual sum that is left represents the development surplus or “headroom”. Consideration of this then allows an informed decision to be made about the viability of the development in general, and in particular, the ability to fund other planning policy options, involving additional costs for development, including developer contributions policies and also the prospect for the introduction of a CIL tariff.”

2.99 The study appraised the local property market in Sefton for office, industrial and retail uses. Key points from this analysis are summarised in Table 10.

Table 10 – Local Plan and Community Infrastructure Levy Economic Viability Study, Market Appraisal Research

Sector	Key Comments
Offices	<ul style="list-style-type: none"> • Areas such as Formby and Southport command higher rents to the order of between £100 and £140/sqm for modern Grade A office stock. • Bootle is still perceived to be a ‘public sector’ location, with a number of older and redundant buildings

Sector	Key Comments
	<p>characterising the stock within the area.</p> <ul style="list-style-type: none"> • Alaska House, Dunningsbridge Road, Netherton is a good indicator for the rents that could be achieved on new build office stock within the area. Units of between 800 sqm and 3,600 sqm are currently available at rents of £135/sqm • The transaction rate per year is low • Average land values for this use are £430,000/ha
Industrial	<ul style="list-style-type: none"> • Across the Liverpool City Region there is an ongoing mismatch between modern business requirements and the older stock on offer in often poor locations within the sub region. Partly as a result of this, prime industrial rents in the Liverpool City Region lag behind those in Manchester and Warrington. Headline rents remain at £45/sqm for industrial accommodation. Rents of £50/sqm could be achieved for well-located new build stock and have been achieved at Vestey Business Park in Bootle • It is anticipated that yields of between 7-8 percent could be achievable on the best stock in Sefton • Average land values for this use are £495,000/ha
Retail	<ul style="list-style-type: none"> • Liverpool City Centre has continued to perform well, to the detriment of other locations including the Strand Shopping Centre in Bootle and Lord Street in Southport • In 2012 quote retail vacancy rates of 19 and 13.4 percent were recorded in Bootle and Southport respectively against a national average of 11.8 percent • Prime rents along Lord Street (in Southport) appear to be around £200/sqm(on an overall basis per annum) • Units within the Strand Shopping Centre in Bootle are available at rents of between £120 and £350/sqm The Shopping Centre appears to be trading relatively poorly, with vacancy rates of 12.6 percent • Rents remain at between £180 and £250/sqm for larger format supermarkets, although for smaller convenience type units rental levels are between £100 and £150/sqm • Transactions involving Tesco units have typically traded at net initial yields of between 4.5 and 6 percent, whilst a number of historic transactions involving Sainsbury's stores are between 4.5 and 5 percent • Budget supermarkets are achieving rents of £90 and £120/sqm. From an investment perspective, units have transacted at yields of between 5.4 and 7 percent • Average land values for this use are £1,235,500/ha for convenience/small comparison retail, £740,500-£495,000/ha for small comparison retail in secondary/tertiary locations, £1,855,000/ha for medium comparison retail (all areas), £2,470,000/ha

Sector	Key Comments
	for large comparison retail (all areas).
Leisure	<ul style="list-style-type: none"> • Pub operators in the North West seeking to develop new premises and will pay rents on new build properties ranging between £175/sqm and £210/sqm with yields at around 6 percent • Fast food operators typically achieve rents of 200-250/sqm • Average land values for this use are £740,000/ha.

Source: Sefton Council, 2014.

2.100 The study reviewed three employment sites which remain within the Local Plan – MN2.46 and MN3: Land East of Maghull, MN2.48 and MN4: Land North of Formby Industrial Estate and MN2.49 and MN5: Land South of Formby Industrial Estate. The outcomes of these analyses are summarised in Table 11.

Table 11 – Findings on Strategic Employment Sites

Site	Key Comments	Conclusion
MN2.46 and MN3: Land East of Maghull	An appraisal was prepared based on 1,588 dwellings together with employment development on the balance of the site dominated by B2/B8 uses with some offices. The appraisal shows that development of the site is viable with a development surplus of £18,911,650. This level of surplus equates to 5.42 percent of Gross Development Value. Reducing the housing provision to 1,400, reflecting up to date Local Plan policy gives a development surplus of £12,066,064 or 3.8 percent of Gross Development Value.	Development remains viable here incorporating the proposed level of employment uses together with the new local centre and contributions towards education, new motorway slip roads, a subsidised bus service and a new railway station, albeit at a reduced level of viability. However, the development surplus remains insufficient to provide affordable housing provision in line with policy requirements at 30 percent.
MN2.48 and MN4: Land North of Formby Industrial Estate	A deficit of -£2,700,456 (8 percent of Gross Development Value) is recorded.	The entire development on this site would not be taken forward on a speculative basis. Instead demand for land on this site will predominantly be from owner occupiers who will be seeking a purpose built unit constructed to their requirements. In this respect undertaking the development will be relatively risk free from the developer's perspective and as a result the profit return requirement will be significantly less, reflective of a contractors profit at closer to 6

Site	Key Comments	Conclusion
		percent of cost.
MN2.49 and MN5: Land South of Formby Industrial Estate	A surplus of £5,147,119 (10.7 percent of Gross Development Value) is recorded.	Results suggest that dependent on the final form of the sports facility that is proposed, there may be some scope to reduce the level of enabling development on the site (in the form of retail) and still provide a viable development.

Source: Sefton Council, 2014

Summary

- 2.101 It is a responsibility of local government to support and encourage economic growth. This includes the provision, initially through planning policy, of sufficient employment land and premises. This must be of the right scale, type, location; be readily available for development and be well related to the strategic or local highway network according to the nature of the site and the function of the settlement. One of the most important issues to consider is that the land must be allocated in sustainable locations and be readily capable of development. The employment land portfolio needs to be balanced and to adequately cater to all sectors of the economy, i.e. small and large businesses, offices and industrial, high and low quality operations.
- 2.102 In July 2014, Liverpool City Region secured £232.3 million from the Government's Local Growth Fund to support economic growth in the area – with £35 million of new funding confirmed for 2015/16 and £153.2 million from 2016/17 to 2021. This will be combined with least £30m of additional investment from local partners and the private sector to create a total pot of £262.3 million. By 2021, this Deal will create at least 10,000 jobs and allow 10,000 homes to be built.
- 2.103 Two investments in strategic transport will be supported through this fund in Sefton. These are:
- Improvements to M58, Junction 1 – £5.5 million
 - Development of Maghull North Station – £6.2 million.
- 2.104 The Liverpool City Region: Housing and Economic Development Evidence Base Overview Study (which is based on research derived from the 2010 JELPS) indicates that 55.06 ha (96.2 percent) of Sefton's 2010 land supply (57.22 ha) is likely to be

available over the next five years, while the remaining 2.16 ha will only be available for development after 2016.

- 2.105 The 2011 Overview Study also suggests that Sefton will need 75.85 ha of employment land from 2010 to 2031 (3.61 ha/year). Measured against the 2010 supply, this gives a shortfall of 18.63 ha to 2031.
- 2.106 The more recent Sefton Employment Land and Premises Study Refresh, 2012 indicated that the Council should allocate a further 31 ha of employment land for the period 2012-2031. This accounts for pent-up demand, failures in the property market, land lost to housing developments and other non-employment uses, or the additional 2.63 ha requirement identified by the Port of Liverpool, needed to decant non-port related businesses from within the port expansion area.
- 2.107 The latest research into the Port of Liverpool predicts increases in all areas of port trade. This will result in a need for 400 ha of land for logistics uses (500 ha to provide 25 percent headroom) is therefore required in the sub region over the next 20 years. This is in addition to the land supply which was available in the sub-region early in 2014.
- 2.108 This is a high target but it is important to note that this is only one strand of evidence. From the available report data it is not clear how the increases in trade growth were forecast or exactly how that increasing trade has been translated into sub-regional land requirements on a sector by sector basis. It is also accepted in the report that some elements of trade will go into secondary port locations (which form part of the wider Merseyside 'Superport') such as Garston, Bromborough and Port Weston, rather than to the Port of Liverpool.
- 2.109 Finally, the 400-500 ha need is spread across a large sub regional area which includes all of Merseyside, West Lancashire, Warrington and parts of Cheshire West and Chester. Locations close to the Port of Liverpool are always likely to be desirable but so are options in established logistics locations such as Knowsley (Knowsley Industrial Park), West Lancashire (Skelmersdale), Warrington (Omega) and Widnes (3MG) which offer more direct M6/M62 access.
- 2.110 The emerging Sefton Local Plan sets a Borough-wide employment land target of 84.5 ha for the period 2012-2030. Five Strategic Employment Locations are identified to help meet this need:

- MN2.46 and MN3: Land East of Maghull – 20 ha (net)
- Dunnings Bridge Road Corridor, Netherton (MN2.47(c): Senate Business Park, MN2.47(b): Atlantic Park, and the MN2.47(a): former Peerless Refinery Site) – 26.8 ha
- MN2.48 and MN4: Land to the North of Formby Industrial Estate – 8 ha (net)
- MN2.49 and MN5: Land to the South of Formby Industrial Estate – 7 ha.

2.111 The recent Local Plan and Community Infrastructure Levy Economic Viability Study suggests that the three new strategic sites – MN2.46 and MN3: Land East of Maghull, MN2.48 and MN4: Land North of Formby Industrial Estate and MN2.49 and MN5: Land South of Formby Industrial Estate – are broadly viable although questions were raised as to whether premises at MN2.48 and MN4: Land North of Formby Industrial Estate could be brought forward on a speculative basis.

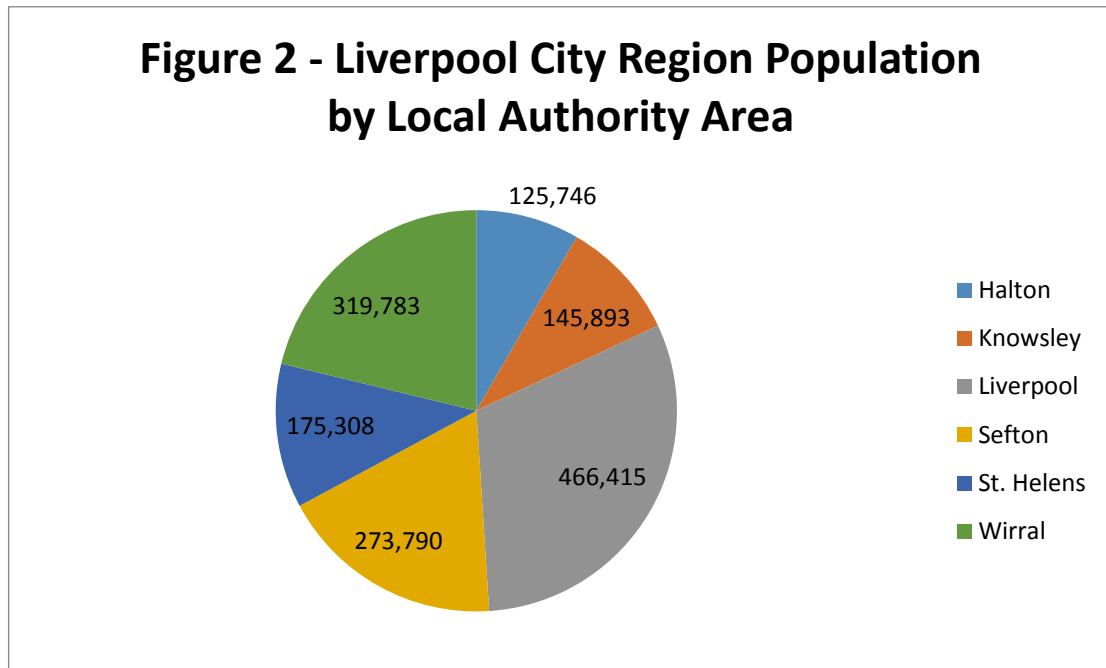
3.0 ECONOMIC CONTEXT

Introduction

- 3.1 This section provides a summary profile of the prevailing social and economic conditions in Sefton. It aims to provide the socio-economic context which shapes employment land demand and supply factors in the study area to facilitate sustainable growth. It also provides an important context for understanding economic demand/need, having regard to the wider regional and national economies.
- 3.2 This section therefore considers the size of the economy, where the businesses are, and what type of businesses they are. By appreciating these aspects it is easier to facilitate economic development by allocating land and premises in the correct locations and of the right type. The profile is a result of secondary research, drawing together a number of existing data sources. It also uses demographic data to build the picture, given that there are no readily available answers to some of the key questions included within this section.
- 3.3 Local planning authorities should have a clear understanding of needs and a good indication of performance against neighbouring areas, as well as sub-regional and national averages. At the sub-regional level, economic development planning is increasingly occurring within the Liverpool City Region rather than within the older defined area of 'Merseyside'. The Liverpool City Region comprises the six local authority areas of Halton, Knowsley, Liverpool, Sefton, St Helens and Wirral. Within this section therefore, Sefton is compared to the five other local authority areas of the Liverpool City Region, including the Unitary Authority of Halton which is excluded from the more traditional definitions of Merseyside. Sefton is also compared to the Liverpool City Region as a whole and the North West region.
- 3.4 Some comparisons are made to data used in the previous Employment Land and Premises Study Refresh, 2012. However, in a number of cases more up to date data sources are now available which are not directly comparable to the information used in the 2012 study.
- 3.5 Finally, although this section does use some data from the 2011 Census, 2012-2015 statistics have also now been produced for a number of socio-economic categories. This section therefore utilises the most up to date data available on each subject.

Demographic Assessment

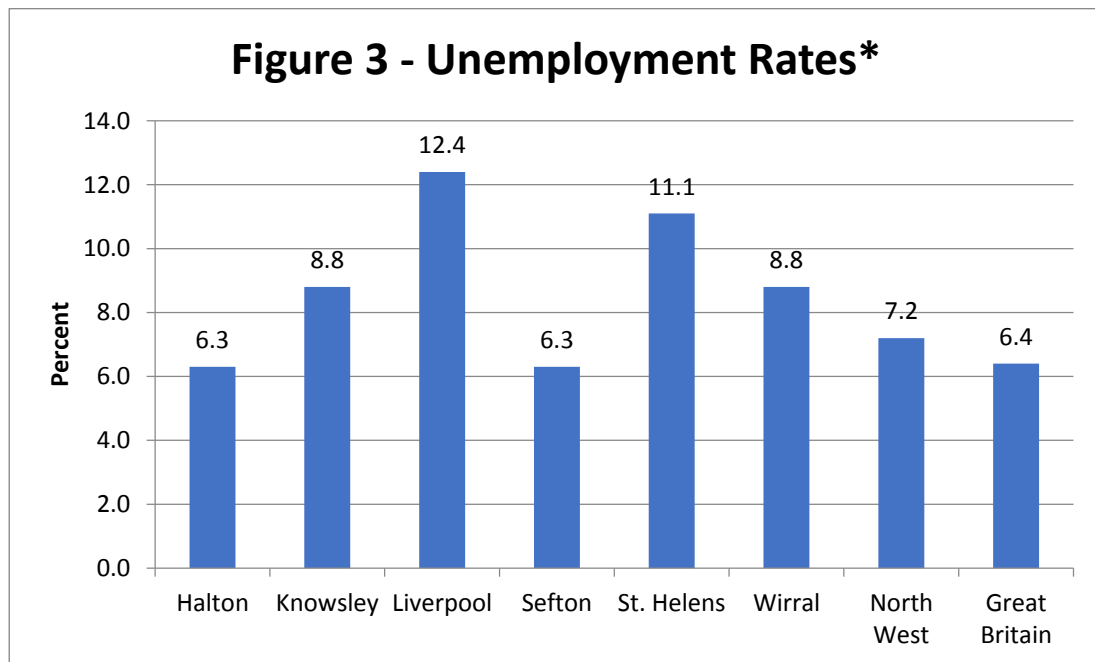
- 3.6 The population of the Borough as of the 2011 Census was 273,790 residents, which was 18.2 percent of the Liverpool City Region total of 1,506,935. As Figure 1 shows, Sefton is the third most populous local authority area in the Liverpool City Region, after Liverpool and Wirral.



Source: 2011 Census

- 3.7 As of the end of 2014 (ONS Annual Population Survey – Jan 2014-Dec 2014), 70.4 percent of Sefton’s working age population was in employment (121,000 residents). This is slightly above the North West average of 69.2 percent, but somewhat below the national average of 72.4 percent.
- 3.8 Levels of economic activity in Sefton compare well with the other local authority areas of the Liverpool City Region. As Figure 3 shows, as of the end of 2014, Sefton and Halton jointly had the lowest unemployment rates in the Liverpool City Region at 6.3 percent each. This is almost exactly half the unemployment rate in Liverpool and well below the level in all other the Liverpool City Region local authority areas. It is also below the regional unemployment level while matching the national level.
- 3.9 Unemployment levels in Sefton have reduced significantly since the height of the recession. In September 2011 (the data used in the Employment Land and Premises Study Refresh, 2012), 9.4 percent of the economically active population was unemployed, compared to only 8.2 regionally and 7.9 nationally. Indeed

unemployment has returned to its pre-recession position – local unemployment was 6.2 percent in early 2007.



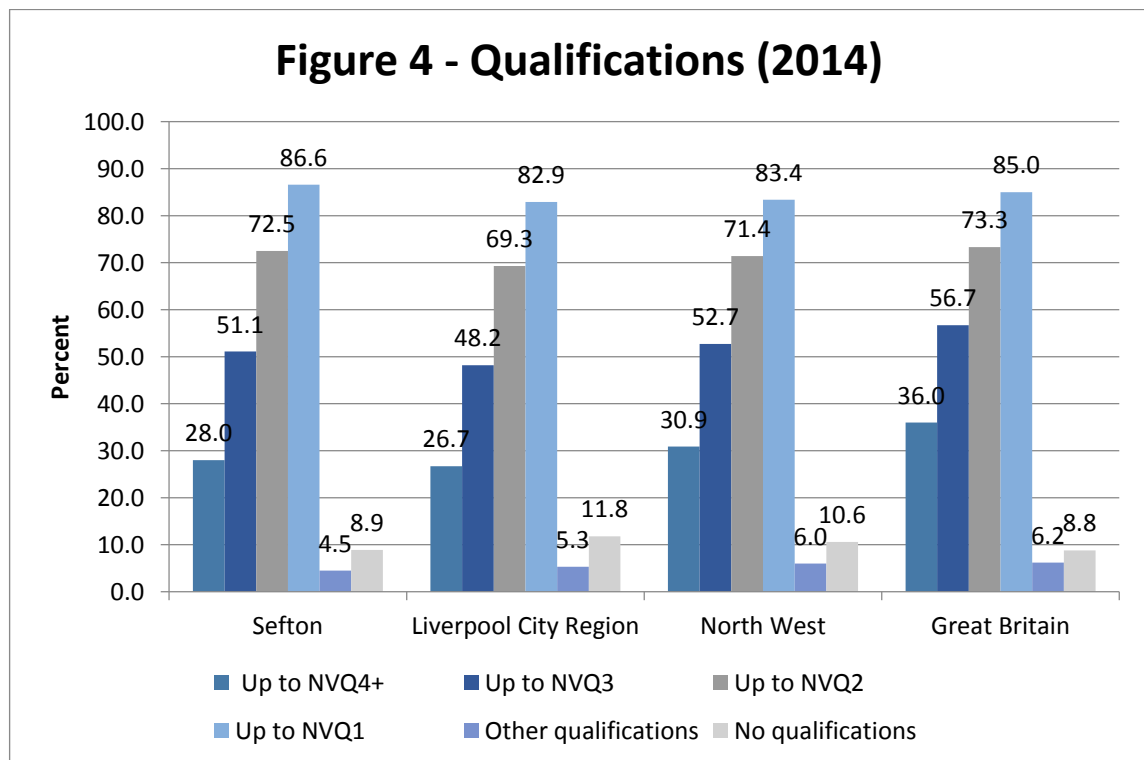
Source: ONS Annual Population Survey, 2014

*Percentage of economically active population.

- 3.10 Sefton is ranked as the 92nd most deprived local authority area in England in the national Index of Multiple Deprivation (2010). This makes Sefton the least deprived borough of the Liverpool City Region. It has a far higher ranking than Liverpool and Knowsley, which are the most and fifth most deprived local authority areas in England.
- 3.11 Also, the Borough's overall ranking has improved since the 2007 Index of Multiple Deprivation, when Sefton was ranked the 83rd most deprived local authority area in England.
- 3.12 In 2010, 18 percent of the Borough's Lower Super Output Areas (LSOAs) were in the top 10 percent most deprived in England and three were ranked in the top 1 percent. The areas of deepest deprivation lie in South Sefton and include parts of Bootle (west/north west of the town centre and south of Balliol Road) and Seaforth.
- 3.13 Figure 4 shows that the National Vocational Qualification (NVQ) level attained by the working age population of Sefton, while reasonable in the context of the Liverpool

City Region, is slightly below regional and national averages. At 28.0 percent, the proportion of working age residents qualified to NVQ Level 4 and above (equivalent to degree level) is below the regional (30.9 percent) and regional averages (36.0 percent). It is, however, above the Liverpool City Region average of 26.7 percent.

- 3.14 The proportion of residents with no qualifications (8.9 percent) is close to the national average of 8.8 percent. However, it is below the Liverpool City Region and North West averages of 11.8 and 10.6 percent respectively.

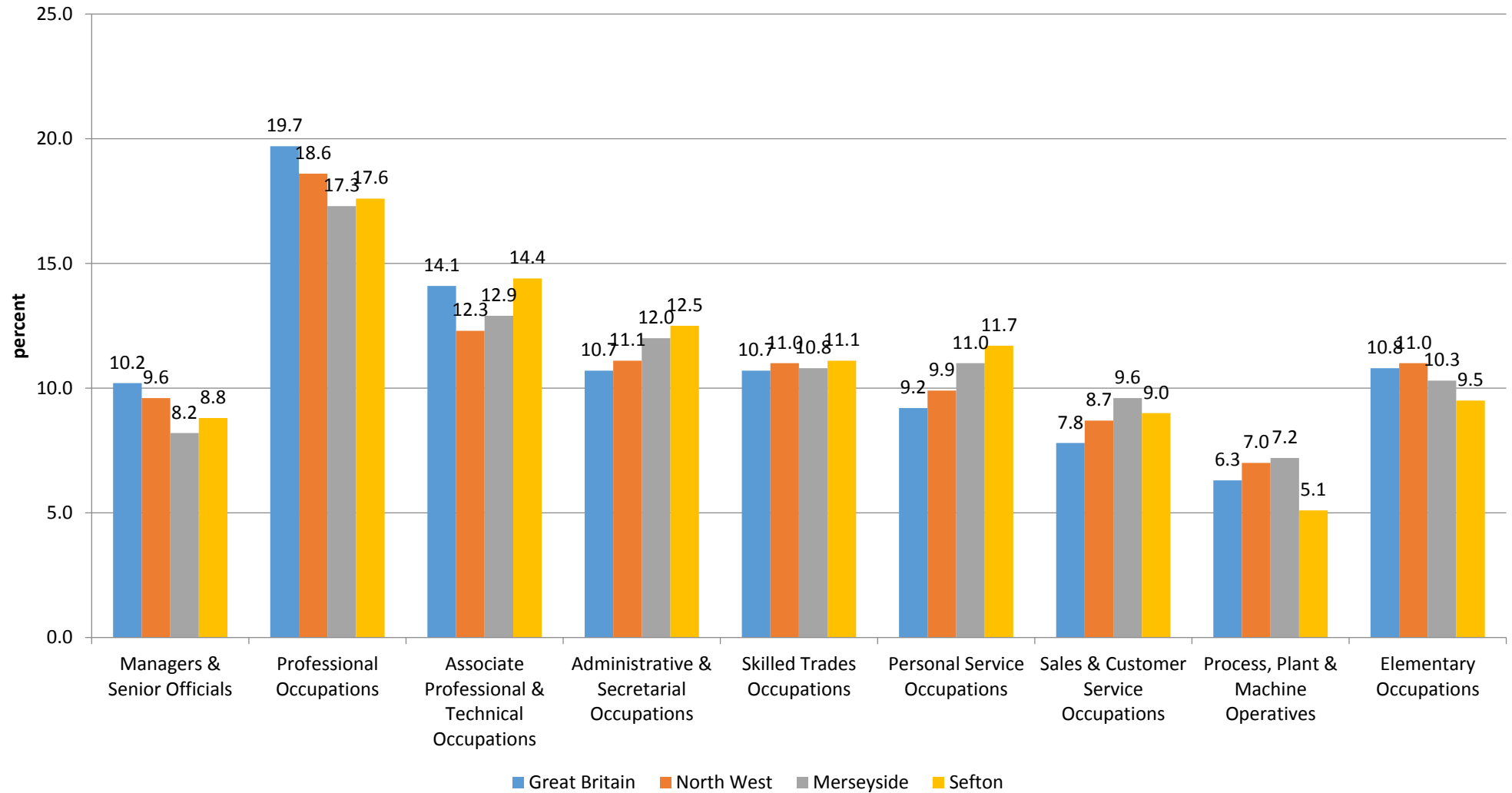


Source: ONS Annual Population Survey 2014

Employment by Occupation

- 3.15 Figure 5 illustrates the breakdown of employment by main occupation group. The data shows that the proportions employed locally as managers and senior officials (8.8 percent and 17.6 percent respectively) are slightly above average for the Liverpool City Region but around a percentage point below regional averages and two percentage points below national averages.

Figure 5 - Employment by Main Occupation Group



Source: ONS Annual Population Survey, 2014

- 3.16 Sefton has a higher proportion of people employed in administrative and secretarial occupations (12.5 percent) than the sub-regional, regional or national averages of 10.7-12.0 percent. At 11.7 percent, the proportion employed locally in personal service occupations is also above wider averages. Personal service occupations can include activities such as domestic/commercial cleaning as well as retail focused services such hairdressing.
- 3.17 Conversely, only modest proportions of people are employed locally as process plant and machine operative and in elementary occupations. The former in particular only accounts for 5.1 percent of employment locally, compared to 7.2 percent across the Liverpool City Region and 7.0 percent across the North West.
- 3.18 Table 12 measures local economic activity using Business Register and Employment Survey (BRES) data from 2013. This is compared to data from 2010, for Sefton only (the data used in the Employment Land and Premises Study Refresh, 2012), to illustrate change over time. BRES provides details of the proportion of jobs within differing industry sectors within a local authority area.
- 3.19 It should be caveated that BRES data is based on a sample survey so estimates are subject to sampling errors which need to be taken into account when interpreting the data. The lower the level of geography and industry the larger the likely variation. This is evidenced by the difference in the total number of jobs in the Borough, as suggested by BRES, between 2010 and 2013. The data shows a decrease of 4,083 jobs between 2010 and 2013 (from 91,528 to 87,445). This is in conflict with other sources, considered in this study, notably the forecasting data reviewed in Section 8.0, which suggest increases in employment over that period. Sharp increases or decreases in jobs are shown in most industry sectors over this same period which, again seem unusually high for a period of only three years. For this reason the BRES data shown in Table 12 is shown as proportions only and all figures must be treated as indicative of the general breakdown of economic activity, by sector, in the Borough over this period rather than as a definitive picture.

Table 12 – Economic Activity

	Employment Structure, Proportion of Jobs				
	Sefton, 2010	Sefton, 2013	Liverpool City Region	North West	Great Britain
1 : Agriculture, forestry & fishing*	0.1	0.1	0.0	0.4	0.8
2 : Mining, quarrying & utilities	0.3	0.3	0.8	1.2	1.3
3 : Manufacturing	5.1	4.8	7.7	10.1	8.7
4 : Construction	4.2	4.1	4.1	4.7	4.6
5 : Motor trades	1.9	1.5	1.2	1.6	1.8
6 : Wholesale	2.3	2.6	3.4	4.4	4.2
7 : Retail	13.3	13.4	10.8	10.2	10.3
8 : Transport & storage (inc postal)	3.0	4.0	5.3	4.7	4.5
9 : Accommodation & food services	8.7	6.4	6.4	6.6	6.6
10 : Information & communication	1.1	1.2	3.1	2.7	3.9
11 : Financial & insurance	4.0	4.4	2.8	3.3	3.8
12 : Property	1.1	1.7	1.8	1.8	1.5
13 : Professional, scientific & technical	3.9	4.7	6.3	7.6	7.2
14 : Business administration & support services	3.8	5.7	7.2	8.0	8.0
15 : Public administration & defence	13.1	11.0	6.4	5.0	5.7
16 : Education	10.3	10.6	9.9	9.1	9.5
17 : Health	19.0	19.5	18.2	14.5	13.2
18 : Arts, entertainment, recreation & other services	4.7	4.1	4.5	4.2	4.6

Source: Business Register and Employment Survey 2013

*Excludes farm based agriculture.

3.20 Table 12 illustrates the strength of public sector employment in Sefton. 41.1 percent of the Borough's workforce is employed in public administration, education and health. This is slightly reduced on 2010, when 42.4 percent of the Borough's workforce was employed by the public sector. However, local public employment remains well above the Liverpool City Region average of 34.5 percent. It is also well above regional and national figures 28.6 and 28.4 percent respectively. It should be

noted, however, that the latest figures are from 2013, a point before national reductions in public spending will have taken their full effect.

3.21 Conversely the data shows, when measured by employment at least, that the proportion of local manufacturing jobs is considerably lower than Liverpool City Region, regional or national figures. In 2013, manufacturing accounted for 4.8 percent of jobs, only slightly reduced from the 2013 proportion of 5.1 percent. By comparison, manufacturing accounted for 7.7 percent of jobs across Liverpool City Region and 10.1 percent across the North West. Within the general manufacturing sector, some key local sub-sectors include:

- Manufacture of bakery and farinaceous products, which employed 447 or 11.4 percent of the total manufacturing labour force in 2013 (with a likely focus at Allied Bakery, Dunning's Bridge Road, Netherton)
- Manufacture of plastics products, which employed 373 or 8.9 percent of the total manufacturing labour force in 2013
- Treatment and coating of metals; machining, which employed 344 or 8.2 percent of the total manufacturing labour force in 2013.

3.22 The strongest office-based sectors are business administration and support services followed by professional, scientific and technical. In both cases the proportion employed was below wider averages, but both sectors employ a higher proportion of local workers than they did in 2010.

3.23 Financial and insurance also has a comparatively strong role in the Borough when compared to wider averages, employing 4.4 percent of workers in 2013 (4.0 percent in 2010), compared to 2.8 percent across the Liverpool City Region, 3.3 percent regionally and 3.8 percent nationally.

3.24 In terms of town centre uses, retail accounted for 13.4 percent of jobs compared to wider averages of around 10 percent. Accommodation and food services accounted for 6.4 percent of local employment, broadly in line with wider averages. The indicative evidence is that employment in this sector has decreased, as a proportion of total employment at least, since 2010.

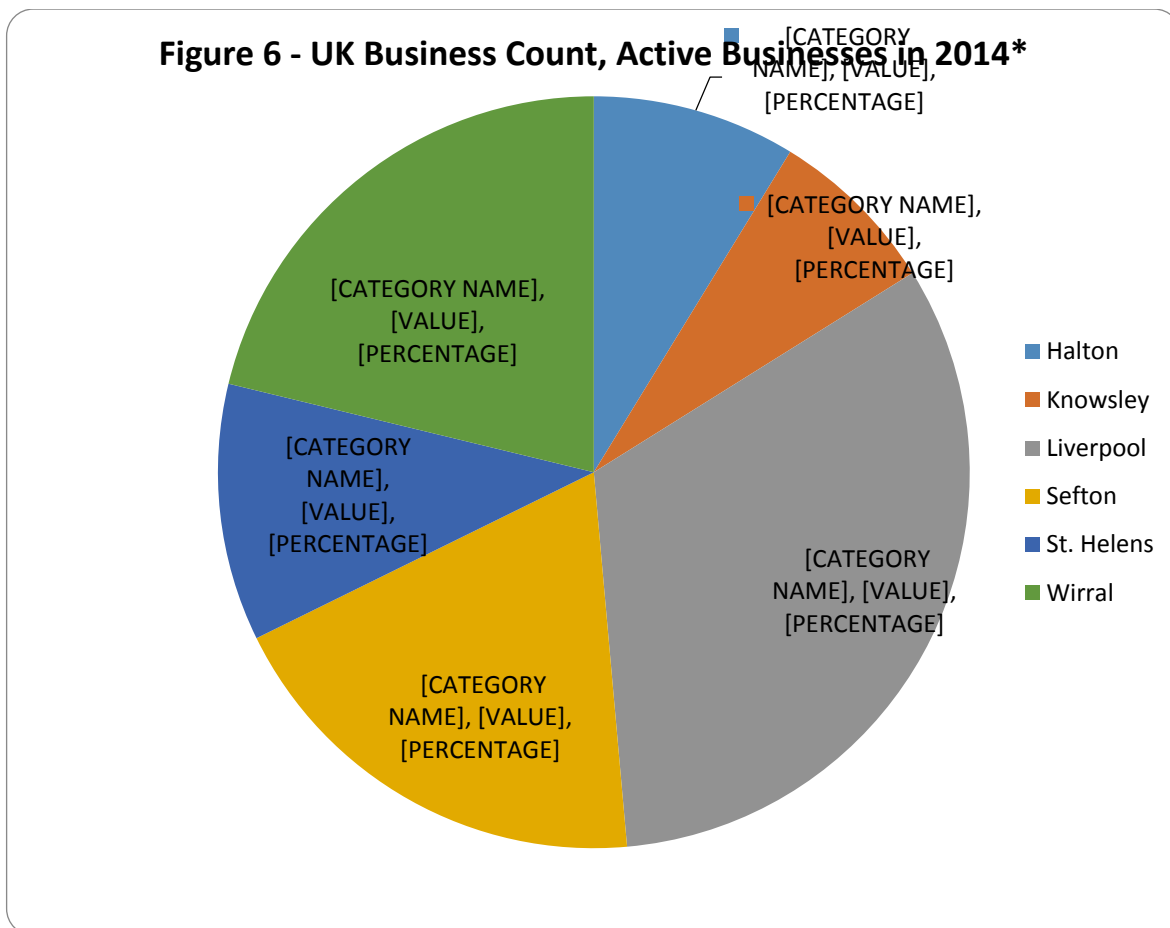
3.25 Transport and storage (logistics) employed only modest numbers locally, 4.0 percent, compared to 5.3 percent across the Liverpool City Region. However, indicative

evidence is that the proportion employed in this sector has grown somewhat since 2010.

Numbers and Sizes of Businesses

3.26 ONS data identifies that there were 8,375 VAT and PAYE registered businesses operating in the Borough (see Figure 6) in 2014. The data source used here (ONS UK Business Counts – Local Units) differs from that used in the previous Employment Land and Premises Study Refresh, 2012, (VAT Registrations Data) and it is not possible to meaningfully compare the two. Rather a separate analysis of business growth and death in Sefton, over time, is undertaken below.

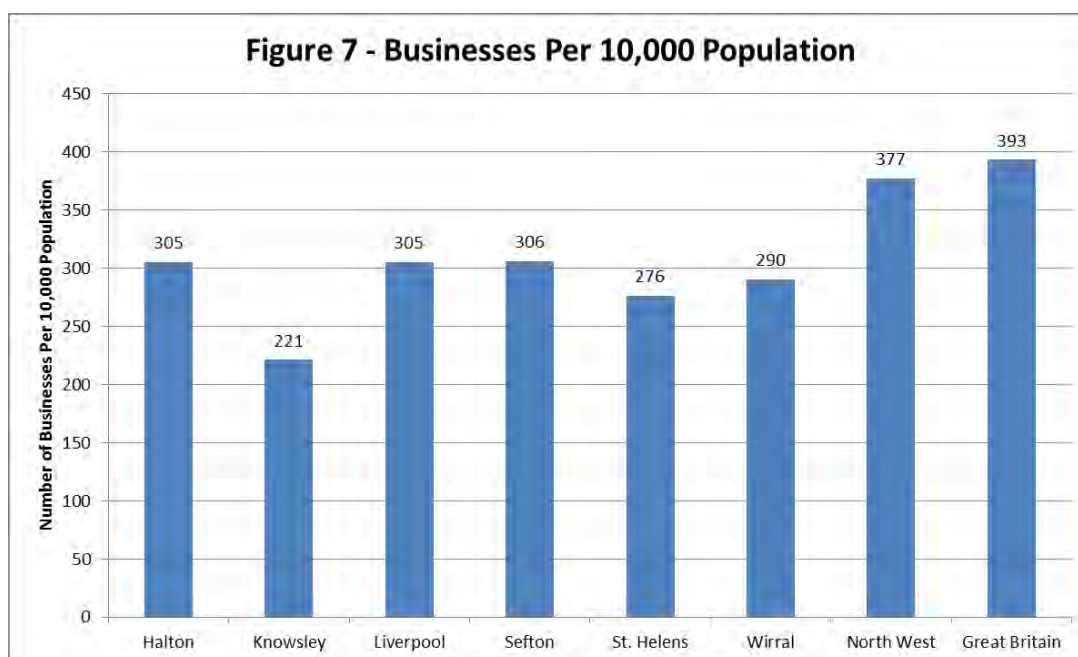
3.27 8,375 businesses comprises 19.1 percent of the total stock of businesses in the Liverpool City Region and 3.1 percent of the North West stock. As Figure 6 also shows that Sefton has the third highest total stock of businesses in the Liverpool City Region, after Liverpool and Wirral. In comparison numbers in Halton and Knowsley are quite low when the large industrial estates and business parks within each local authority area are considered. The likely explanation for this is that the big employment areas of Halton and Knowsley are dominated by a range of large companies which will only count as single enterprises in the data.



Source: ONS UK Business Counts – Local Units

*This publication is compiled from the Inter Departmental Business Register which contains information on VAT traders and PAYE employers in a statistical register representing nearly 99 percent of economic activity.

3.28 However given the differences in population and geographic size of the various Liverpool City Region local authority areas it is more meaningful to measure the stock of businesses against local population. Figure 7 therefore also shows the number of businesses per 10,000 people in each Liverpool City Region local authority area.



Source: ONS UK Business Counts – Local Units, 2014/2011 Census

- 3.29 Relative to its population, Sefton has a reasonable number of businesses when compared to the other local authority areas of the Liverpool City Region. Figure 7 shows that Halton, Liverpool and Sefton have similar proportionate rates of 305/306 per 10,000 population. Again Knowsley is seen to have a low rate of business provision. The number of businesses per 10,000 population in Sefton, and in all the other Liverpool City Region local authority areas, is quite low in the regional and national contexts however.
- 3.30 Table 13 shows the birth rates of new enterprises over the period 2004-2013 (the period where such data is readily available), both by annual number of start-ups and by new businesses per 10,000 population. It focuses on the key years of 2007 (the pre-recession market peak), 2010 (the approximate mid-point of the recession) and 2013 (the onset of market recovery).
- 3.31 Across all the local authority areas of the Liverpool City Region there is a clear trend of high and increasing levels of business creation over 2004-2007, followed by a reduction in 2010. 2013, the year of market recovery saw the highest rates of business birth in all areas.

Table 13 – Births of New Enterprises 2004-2013, Number and per 10,000 Population

Area	2004		2007		2010		2013	
	No.	Per 10,000	No.	Per 10,000	No.	Per 10,000	No.	Per 10,000
Halton	360	27	445	35	305	24	520	41
Knowsley	310	21	350	24	300	21	525	36
Liverpool	1,545	33	1,690	36	1,290	28	2,250	48
Sefton	975	36	1,020	37	760	28	1,220	45
St Helens	460	26	600	34	415	24	640	37
Wirral	1,155	36	1,175	37	815	25	1,400	44
Liverpool City Region	4,805	31	5,280	35	3,885	26	6,555	43
North West	28,845	41	30,195	43	22,705	32	35,285	50
Great Britain	274,350	45	274,770	45	230,555	38	341,630	56

Source: ONS Business Demography, 2013

3.32 Business creation in Sefton is high in the Liverpool City Region context. When considered on a per 10,000 population basis, Sefton had the highest rate of job creation (jointly with Wirral) in the Liverpool City Region in 2004 and 2007. As was the case elsewhere, Sefton saw a sharp drop in new business formation in 2010, on the 2007 levels. However, even in that year Sefton had the highest proportionate rate of company creation in the sub-region (jointly with Liverpool in that year). In 2013, new business start-up levels in Sefton had increased by almost two thirds on 2010 (both by numbers and on a per 10,000 population basis). In that year Sefton had the second highest proportionate rate of business formation, after Liverpool. Across the Liverpool City Region however, proportionate business birth rates are behind regional and national levels, for all four years studied.

3.33 Table 14 shows the rates of business death for the same 2004-2013 period. Again there is a modest pattern of increased business dissolutions in 2010, compared to previous years, followed by a reduction in 2013. However, this is only obvious in some Liverpool City Region local authority areas. In Sefton, rates of business loss were actually higher in 2004 than in 2010. In St Helens and Wirral, and Liverpool City Region wide, the 2004 and 2010 death rates are similar. Halton and Knowsley show very little change in their rates of company loss across all three years recorded.

3.34 When measured against population, the rate of business loss in Sefton (at 28-34) is somewhat higher than in most Liverpool City Region local authority areas across all

four years. The main exception is 2010, when a slightly higher proportionate rate of loss was recorded in Liverpool. Rates of business loss were below regional and particularly national levels across all four years.

Table 14 – Deaths of Enterprises 2004-2013, Number and per 10,000 Population

Area	2004		2007		2010		2013	
	No.	Per 10,000	No.	Per 10,000	No.	Per 10,000	No.	Per 10,000
Halton	295	25	320	25	320	25	305	24
Knowsley	295	20	275	19	285	20	285	20
Liverpool	1,315	28	1,305	28	1,490	32	1,310	28
Sefton	940	34	765	28	830	30	760	28
St Helens	420	24	340	19	435	25	410	23
Wirral	920	29	815	25	920	29	860	27
Liverpool City Region	4,185	28	3,820	25	4,280	28	3,930	26
North West	24,890	35	23,485	33	26,135	37	24,130	34
Great Britain	239,705	39	219,840	36	243,405	40	232,540	38

Source: ONS Business Demography, 2013

3.35 82.9 percent of businesses in Great Britain employ less than ten people (micro businesses), and overall 96.8 percent of all businesses are classified as small (up to 49 employees). Business sizes in Sefton, and across the Liverpool City Region, generally follow national averages. As Table 15 shows, 96.6 percent of businesses in Sefton employ less than 50 employees, while the proportion employing less than ten is only slightly below average at 81.1 percent. Generally, however, Sefton and the Liverpool City Region have slightly higher proportions of businesses in the 5-9 and 10-19 size categories than is the case regionally and nationally.

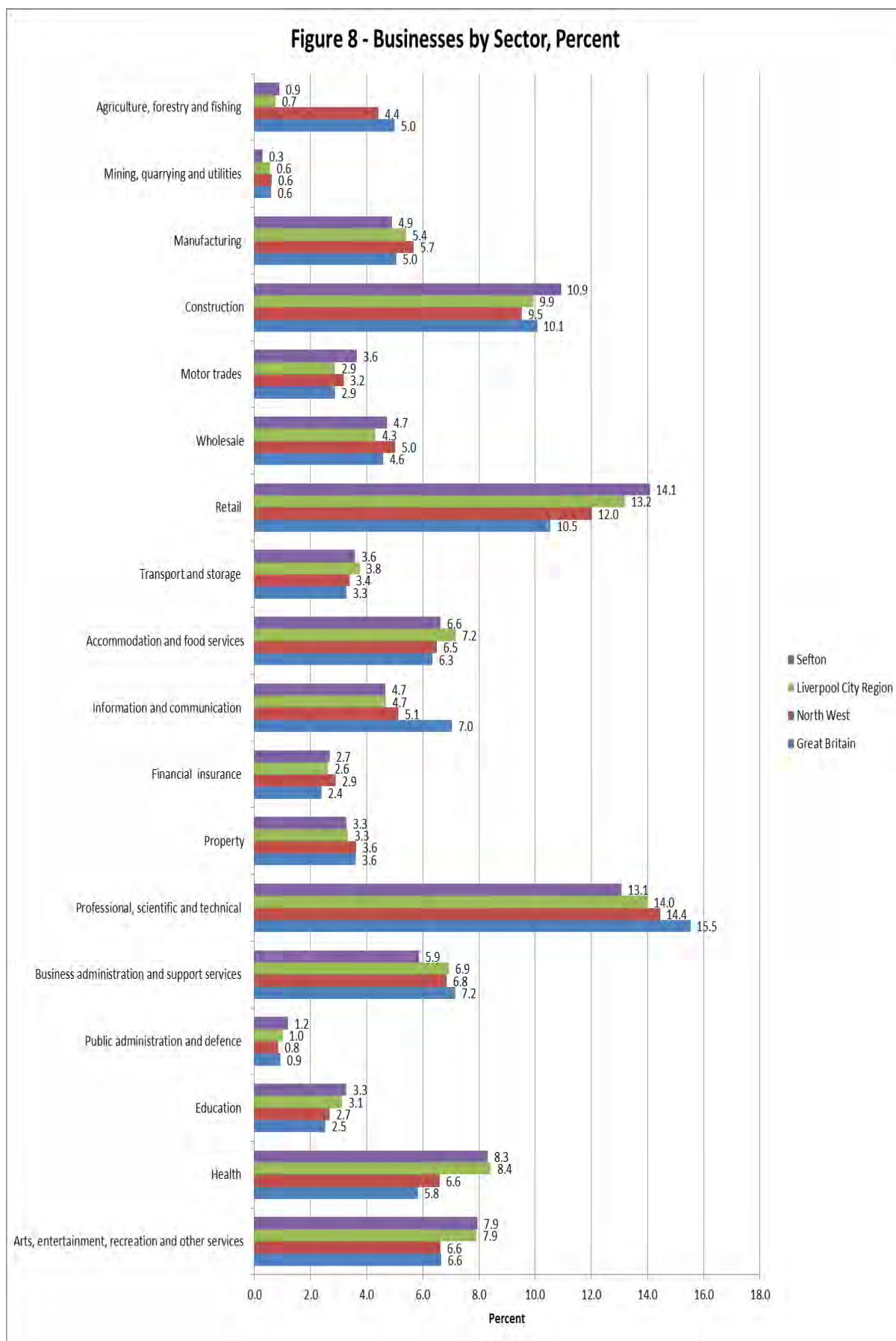
Table 15 – Business Sizes

Area	Number of Employees						
	1-4	5-9	10-19	20-49	50-99	100-249	250+
Sefton	64.8	16.3	9.1	6.4	2.0	1.0	0.3
Liverpool City Region	61.9	16.8	9.7	7.2	2.5	1.3	0.6
North West	66.0	15.2	8.9	6.2	2.0	1.1	0.5
Great Britain	68.4	14.5	8.4	5.5	1.9	1.0	0.4

Source: ONS UK Business Counts – Local Units, 2014

- 3.36 The total number of businesses can be broken down further by industry sector. Figure 8 shows that the highest proportion of businesses in Sefton is in the retail sector. This sector accounts for 14.1 percent of active businesses, above wider averages.
- 3.37 The strongest office based sector is professional, scientific and technical. This includes a range of professional uses such as architects and solicitors, alongside research and development businesses. This sector accounts for 13.1 percent of active businesses, below Liverpool City Region, regional and national averages of 14.0-15.5 percent. This can be compared to the BRES data above (Table 12), from a year earlier, which shows that only 4.7 percent of local employment is in the professional, scientific and technical sector. This suggests that most professional, scientific and technical businesses in the Borough are micro businesses, employing only a few people.
- 3.38 The next largest business sector is construction. At 10.9 percent, the proportion of construction businesses in the Borough is slightly above wider averages.
- 3.39 In addition to professional, scientific and technical companies, Sefton also has a reasonable proportion of information and communication firms. 4.7 percent of local businesses are in this sector, in line with Liverpool City Region and North West averages, but low in the national context. The proportion of financial and insurance businesses conforms to wider averages while the proportion of businesses providing business administration and support services is low when compared to wider averages.
- 3.40 In terms of the number of businesses, leisure and town centre uses, other than retail, are not particularly prominent. Despite the presence of Southport as a defined resort town, the local proportion of accommodation and food services businesses (6.6 percent) is slightly below the Liverpool City Region average (7.2 percent) and close to regional and national averages of 6.5 and 6.3 percent. Arts, entertainment, recreation and other services accounts for 7.9 percent of businesses, in line with the Liverpool City Region average.
- 3.41 The local manufacturing sector comprises a modest 4.9 percent of businesses, slightly below Liverpool City Region and regional averages of 5.4 and 5.7 percent.

This mirrors the levels of employment, as seen in Table 12 above, which is also modest when compared to wider averages.



Source: ONS UK Business Counts – Local Units, 2014

3.42 Only 0.9 percent of local firms are in the agriculture, forestry and fishing sectors, close to the Liverpool City Region average of 0.7 percent. This illustrates that, notwithstanding the rural nature of large parts of North Sefton, traditional rural industries (including mining and quarrying) only have a modest role in Sefton's economy.

Premises Supply

3.43 Table 16 shows the supply of office and industrial premises (hereditaments identified by the Valuation Office for the purposes of business rates collection) by unit. The most recent Valuation Office data available at the local authority level is 2012, so will not include any very recent development.

3.44 In 2012, Sefton had 1,700 industrial/warehouse units, 17.1 percent of the Liverpool City Region's total stock and 2.8 percent of the regional stock. The number of industrial units in Sefton was almost double the number of offices (860). Sefton had 12.8 percent of the sub region's office supply and 2.0 percent of the regional stock. In 2012, Sefton contained 3,300 retail units, 20.2 percent of the Liverpool City Region's stock and 4.2 percent of the North West stock.

Table 16 – Distribution of Premises, Number of Units

	Industrial/ Warehouses	Offices	Retail
Halton	1,130	590	1020
Knowsley	960	380	890
Liverpool	3,230	3,430	6,000
Sefton	1,700	860	3,300
St Helens	1,190	600	1,660
Wirral	1,730	880	3,490
Liverpool City Region	9,940	6,740	16,360
North West	60,700	42,870	79,190

Source: ONS Commercial and Industrial Floorspace, 2012

3.45 Although modest in the context of Liverpool, Sefton's stock of premises compares well to the other local authority areas of the Liverpool City Region. In terms of industrial/warehouse premises, only Wirral has a larger stock, and only by 30 units. In terms of offices as well, Wirral's stock is only slightly larger. In terms of retail

premises as well, only Wirral has a larger supply, although in this case Wirral's lead is slightly larger with 3,490 units to Sefton's 3,300.

3.46 Table 17 shows the supply of office and industrial premises by floorspace. In 2012, Sefton had 869,000 sqm of industrial/warehouse space, 10.0 percent of the Liverpool City Region's floorspace and 1.8 percent of the regional floorspace. This is a modest supply when compared to the other local authority areas of the Liverpool City Region, suggesting that Sefton's large stock of industrial/warehouse units (1,700) is more focused on smaller premises than is the case elsewhere. Sefton also had 15.4 percent of the sub region's office floorspace (319,000 sqm) and 3.0 percent of the regional floorspace. This is the second largest floorspace stock in the Liverpool City Region, after Liverpool and noticeably above the supply in strongly industrial locations such as Knowsley and St Helens. In 2012, Sefton contained 661,000 sqm of retail space, 19.8 percent of the Liverpool City Region's floorspace and 4.0 percent of the North West floorspace. Again only Liverpool has more floorspace within the Liverpool City Region.

Table 17 – Distribution of Premises, Floorspace, Sqm

	Industrial/ Warehouses	Offices	Retail
Halton	1,357,000	227,000	218,000
Knowsley	1,427,000	95,000	178,000
Liverpool	2,227,000	1,059,000	1,302,000
Sefton	869,000	319,000	661,000
St Helens	1,620,000	148,000	360,000
Wirral	1,201,000	222,000	614,000
Liverpool City Region	8,701,000	2,070,000	3,333,000
North West	49,411,000	10,735,000	16,474,000

Source: ONS Commercial and Industrial Floorspace, 2012

3.47 The spatial distribution of premises can be analysed by Middle Super Output Areas (MSOAs). Sefton comprises 38 such MSOAs, and these have been separated into the main settlements and their surrounding hinterlands. However, the most recent Valuation Office data available at the MSOA level is only for 2008, which pre-dates the recession and was used in the previous Employment Land and Premises Study Refresh, 2012 (Table 18).

Table 18 – Distribution of Premises and Homeworking

Area	Middle SOAs	Number of Units (Floorspace, sqm)		
		Industrial/ Warehouses	Offices	Retail
North Sefton				
<i>Southport</i> Includes Ainsdale	001-011	653 (229,000)	354 (71,000)	1,417 (303,000)
<i>Formby</i> Includes Woodvale Airfield, Little Altcar, Hightown and Ince Blundell	012-016	94 (36,000)	66 (7,000)	221 (39,000)
Sub-Total		747 (265,000)	420 (78,000)	1,638 (342,000)
South Sefton				
<i>Maghull</i> Includes Melling	17-20	68 (32,000)	17 (6,000)	219 (21,000)
<i>Crosby</i> Includes Little Crosby, Sefton Village	21-22, 25,28, 30	53 (44,000)	137 (25,000)	521 (61,000)
<i>Aintree/Netherton</i> Includes Employment Areas off Dunnings Bridge Road, Aintree Racecourse Business Park, Waddicar	23-24, 26- 27, 29	211 (204,000)	29 (23,000)	178 (86,000)
<i>Litherland/Seaforth</i> Includes Seaforth Container Terminal	31-34	144 (78,000)	96 (22,000)	233 (22,000)
<i>Bootle</i> Includes businesses/dock infrastructure off Derby Road, Bootle Town Centre, Employment Areas off Hawthorne Road	35-38	432 (339,000)	156 (157,000)	568 (78,000)
Sub-Total		908 (697,000)	435 (233,000)	1,719 (268,000)
Total	-	1,655 (962,000)	855 (311,000)	3,357 (610,000)

Source: ONS Commercial and Industrial Floorspace 2008

3.48 Table 18 shows that the number of industrial units is almost double the number of offices. Perhaps surprisingly the greatest concentration of premises was in

Southport. MSOA 004, which includes Southport Town Centre, on its own has 82 industrial/warehouse (18,000 sqm of space), 243 office premises (43,000 sqm) and 1,041 retail units (199,000 sqm). MSOA 007, which extends south from the town centre into Birkdale, contains another 196 industrial (51,000 sqm), 43 office premises (7,000 sqm) and 256 shops (28,000 sqm). The dominance of Southport is accounted for by the extensive office supply in Southport Town Centre, by the 66 small industrial units of Blowick Industrial Estate and by the large number of backland sites, spread throughout the town, which are in employment use.

- 3.49 In South Sefton, Bootle (which includes most of the Port south of Seaforth) has the largest supply. MSOA 037 has the largest supply in South Sefton, with 311 industrial units (219,000 sqm), 118 offices (121,000 sqm) and 267 shops (50,000 sqm). This MSOA covers most of the Port (from Gladstone Graving Dock to the Liverpool boundary), Maritime Enterprise Park, South Sefton Business Centre (and surrounding premises) and most of Bootle Town Centre and Bootle Office Quarter.
- 3.50 There is relatively little commercial space in the mainly residential settlements of Formby, Maghull and (to a lesser extent) Crosby.
- 3.51 Comparison of the totals in Table 18, for 2008, with the earlier Tables 16 and 17, which provide 2012 data, suggest a modest gain in industrial/warehouse space over the 2008 to 2012 period of some 45 units. This is consistent with the pattern of completions over these four years. Vesty Business Park, Netherton is the only large industrial scheme to be completed over these four years. The gain in offices, some five units, is negligible reflecting a lack office development over this recessionary period. 57 extra retail units are also recorded likely reflecting new premises in Southport (particularly around Marine Drive) and convenience store development throughout the Borough.
- 3.52 In terms of floorspace however, comparing 2008 and 2012 data shows a very large drop in industrial/warehouse floorspace, some 93,000 sqm. This may be partly accounted for by large demolitions which occurred over this period, for example the clearance of part of the former Roll Royce premises at MN2.47(b): Atlantic Park. However, even allowing for some large demolitions over this period it still appears to be a substantial loss of floorspace and it is likely that some of the decline is actually due to recalculations/revisions in the VOA measurement data and changes in how that data is analysed.

Homeworking

3.53 Homeworking does play a role in the economy of Sefton. The 2011 Census records that 8.5 percent of the economically active population of the Borough, in employment, worked from home that year. This is an increase on the 7.5 percent recorded by the 2001 Census. As can be seen below, this is the highest proportion of homeworking in the Liverpool City Region, albeit closely followed by Wirral:

- Halton – 6.5 percent
- Knowsley – 5.8 percent
- Liverpool – 6.2 percent
- Sefton – 8.5 percent
- St Helens – 6.9 percent
- Wirral – 8.4 percent.

3.54 The proportion working from home in Sefton is only slightly below the North West average of 9.1 percent.

3.55 Unsurprisingly, higher proportions of people worked from home in the more suburban parts of North Sefton. Homeworking is extremely prevalent in the area between Birkdale, Ainsdale and north Formby. The three MSOAs which cover this area (009, 012-013) have homeworking rates of 13-15.6 percent. Within urban parts of South Sefton, homeworking proportions are 6-9 percent.

Commuting Patterns

3.56 Statistics on commuting were collected in the 2011 Census (see Table 19). These figures show that, in that year, Sefton was a net exporter of labour with a net outflow of 19,181. This is the second largest level of outflow in the Liverpool City Region, after that in Wirral. Liverpool was by far the largest importer in the sub region with a net inflow of some 39,477 workers.

Table 19 – Liverpool City Region Commuting Flows, 2011

Area	Out-Commuters (No.)	In-Commuters (No.)	Net Flow (No.)	Percentage who Live and Work in area as a Percentage of the Total Employed, percent
Halton	23,233	23,100	-133	53

Area	Out-Commuters (No.)	In-Commuters (No.)	Net Flow (No.)	Percentage who Live and Work in area as a Percentage of the Total Employed, percent
Knowsley	35,121	30,658	-4,463	36
Liverpool	51,845	91,322	39,477	66
Sefton	47,659	28,478	-19,181	53
St Helens	35,723	22,113	-13,610	48
Wirral	45,025	17,291	-27,734	61

Source: 2011 Census

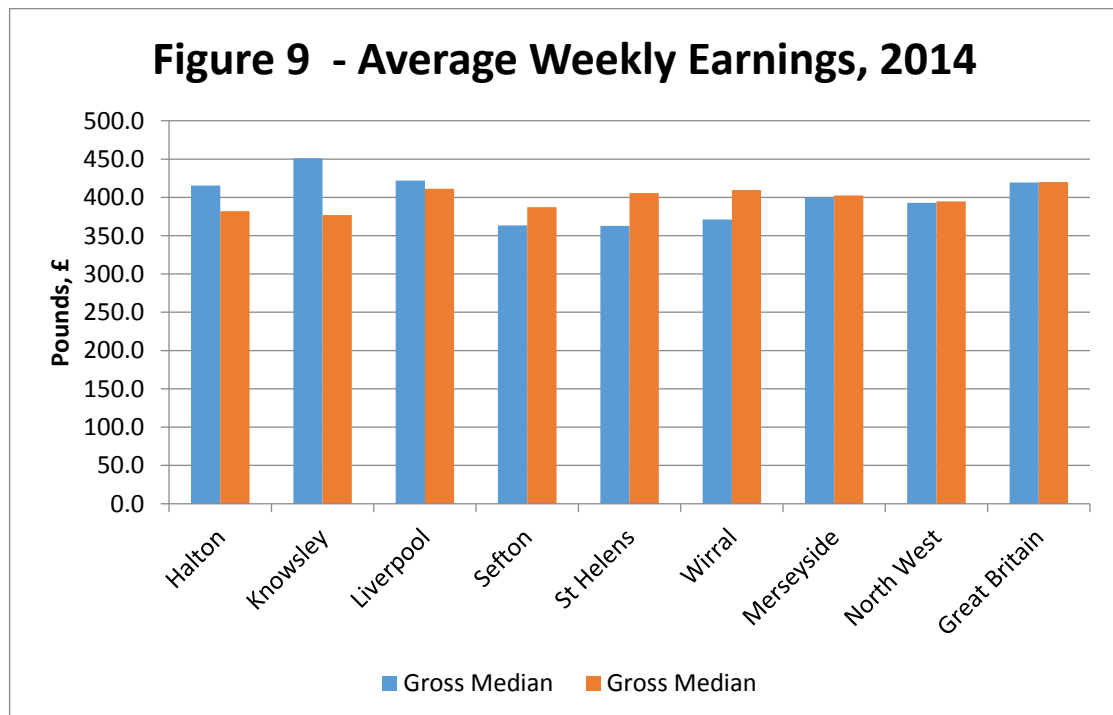
- 3.57 In 2011 at least, 53 percent of the Borough's working residents lived and worked in the area. This was a fairly average level of self containment in the Liverpool City Region, well above levels in neighbouring Knowsley but low when compared to Liverpool and Wirral.
- 3.58 Unsurprisingly Liverpool was the most popular destination for those commuting out of Sefton to work. Just over half of out commuters (24,208 residents) travelled to the city in 2011. The next most popular destination was West Lancashire, which accounted for some 11.0 percent of out commuting (5,220 residents). This was followed by Knowsley, the destination for 8.2 percent of out commuters (3,886 residents). Wirral and St Helens attracted 2.5-2.8 percent of out commuters (1,194 and 1,324 residents respectively). Warrington attracted another 2.6 percent (1,246 residents). Locations in Central Lancashire, Greater Manchester and Cheshire West and Chester attracted modest numbers of commuters, less than 600 each.
- 3.59 28,478 commuted into Sefton to work. Again the largest movement was from Liverpool, 40.5 percent of incomers (11,524) came from the city. 5,476 (19.2 percent) came from West Lancashire, meaning that Sefton is a net importer of labour from this local authority area. 2,996 (10.9 percent) came from Knowsley, making Sefton a net exporter of labour to this local authority area. Sefton imports slightly more labour from Wirral (1,918, 6.7 percent) and St Helens (1,411, 5.0 percent) than it exports. This is not the case for Warrington; only 406 in commuters were recorded as coming from this local authority area in 2011.

Earnings

- 3.60 Figure 9 shows that pay in Sefton is below average. In 2014, average weekly pay in Sefton was £363.4/week when measured by place of work and £387.1/week when measured by place of residence. By both measures, in 2013 at least, this was lower

than in almost all other Liverpool City Region local authority areas. The only exceptions were Knowsley, when measured by place of work (£377.0/week) and St Helens when measured by place of residence (£362.7/week). They are also notably below North West (£392.9/week by place of work and £394.8/week by place of residence) and national West (£419.3/week by place of work and £420.0/week by place of residence) levels.

3.61 It is also worth noting that in Sefton, and more significantly St Helens and Wirral, the average weekly pay of residents is higher than the average pay of those who just work in those areas. In Halton, Liverpool and particularly Knowsley the opposite is true.



Source: Annual Survey of Hours and Earnings 2014

3.62 Compared to 2011 Annual Survey of Hours and Earnings data, used in the Employment Land and Premises Study Refresh, 2012, average pay in Sefton has improved when measured by place of work. In that year local pay, by place of work was £328.8/week against £363.4/week in 2014. By place of residence a more modest improvement is recorded, from £375.0/week in 2011 to £387.1/week in 2014. It should be emphasised that these are average figures which will be impacted by the size and nature of the survey sample used, and the methods of analysis applied.

Summary

- 3.63 Sefton has a population of 273,790, comprising an economically active and skilled workforce. Unemployment is low in the context of Liverpool City Region, and also below regional, and to a lesser degree, national averages. Overall, rates of deprivation are low compared to other parts of the Liverpool City Region although consideration of deprivation issues at the Lower Super Output Area (LSOA) level shows some areas of relatively high deprivation in South Sefton, including parts of Bootle (west/north west of the Town Centre and south of Balliol Road) and Seaforth.
- 3.64 The proportion of residents educated to degree level is reasonable in the Liverpool City Region context but below regional and national averages. However, comparatively few Sefton residents are completely unqualified. A high proportion of local residents work as managers and senior officials. Generally, Sefton has high proportions of people employed in mid-level occupations such as administrative and secretarial or personal services.
- 3.65 Sefton has a strong dependence on public sector employment – 41.1 percent of the Borough’s workforce is employed in public administration, education and health. This is high in the Liverpool City Region, regional and national contexts.
- 3.66 Local manufacturing appears to have a modest economic role, accounting for 4.8 percent of local employment compared to 7 percent of jobs across Liverpool City Region and 10.1 percent across the North West. Dominant local manufacturing sectors include baking, the manufacture of plastics products and the treatment and coating of metals.
- 3.67 In terms of service sectors professional, scientific and technical has the strongest role, accounting for a high proportion (13.1 percent) of local businesses. Sefton also has a reasonable proportion of information and communication firms. 4.7 percent of local businesses are in this sector, in line with Liverpool City Region and North West averages, but low in the national context.
- 3.68 In terms of leisure and town centre uses, retail was the largest overall sector, accounting for 13.4 percent of jobs and 14.1 percent of active businesses. Despite the presence of Southport as a defined resort town, the local proportion of accommodation and food services businesses (6.6 percent) is slightly below the Liverpool City Region average (7.2 percent) and close to regional and national averages of 6.5 and 6.3 percent. Arts, entertainment, recreation and other services

accounts for 7.9 percent of businesses, in line with the Liverpool City Region average.

- 3.69 There were some 8,375 businesses operating in the Borough in 2014. Relative to its population, Sefton has a reasonable number of businesses (306 businesses per 10,000 population) when compared to all the other local authority areas of the Liverpool City Region. Most of those businesses employ less than 10 employees (81.1 percent).
- 3.70 Business start-up rates in Sefton are high in the Liverpool City Region context. However, the rate of business death is also high when compared to other parts of the sub-region. As an illustration of this, in 2013 1,220 business start-ups were recorded in the Borough. However, this must be measured against 760 business deaths, leaving a net increase in the local business stock of only 460 firms.
- 3.71 As Tables 16 and 17 show, in 2012, Sefton had 1,700 industrial/warehouse units, 17.1 percent of the Liverpool City Region's total stock and 2.8 percent of the regional stock. Sefton had 12.8 percent of the sub region's office supply and 2.0 percent of the regional stock. In 2012, Sefton contained 3,300 retail units, 20.2 percent of the Liverpool City Region's stock and 4.2 percent of the North West stock. Although modest in the context of Liverpool, Sefton's stock of premises (although not floorspace) compares well to the other local authority areas of the Liverpool City Region.
- 3.72 The largest concentration of industrial, office and retail premises is in Southport. However, much of the industrial supply is likely to comprise very small workshops on backland sites. Offices and retail are focused in Southport Town Centre. In South Sefton, Bootle contains the largest supply of premises, focused around the Port Area/Derby Road, and the Bootle Office Quarter. Evidence suggests that Sefton has lost some industrial and warehouse premises over the 2008-2012 period although the exact proportion of loss is difficult to quantify.
- 3.73 In 2011, 8.5 percent of the economically active population of the Borough, in employment worked from home. This is high in the Liverpool City Region context. Unsurprisingly, homeworking is highest in rural areas of North Sefton.

3.74 In terms of commuting, Sefton is a net exporter of labour, with the second largest level of net outflow in the Liverpool City Region (-19,181), after that in Wirral. In 2011 at least, 53 percent of the Borough's working residents lived and worked in the area. This was a fairly average level of self containment in the Liverpool City Region, well above levels in neighbouring Knowsley but low when compared to Liverpool and Wirral. Unsurprisingly, the largest commuter movements are to and from Liverpool.

4.0 PROPERTY MARKET ASSESSMENT

Introduction

- 4.1 This section analyses Sefton's property market in the context of national and regional trends. The focus here is on the industrial, warehouse and office markets. Retail, leisure/tourism and other non B-Class employment uses are considered in Section 7.0.
- 4.2 The section also comprises a review of the supply of premises and relevant demand data (property enquiries) along with past market research, where relevant. As further demand evidence, the comments of stakeholders active in Sefton's industrial, warehouse and office property markets are analysed.

National and Regional Property Markets

- 4.3 BE Group, through its long experience operating in the commercial property market across the UK, as well as in the North West specifically, understand market perceptions and the conditions facing the industrial, logistics and office sectors, along with the wider investment market. The following sub-sections draw upon this market experience, providing a brief commentary on emerging trends within these sectors.

Industrial Market

- 4.4 2014 saw some 10 million sqm of industrial floorspace taken up in units of up to 10,000 sqm, of which just over 5 percent (524,000 sqm) was in the North West (Jones Lang LaSalle, 2015). Although this is somewhat down on 2013, it still reflects a growing confidence particularly at the smaller end of the market. Over the 2008-2012 recession a lack of finance, lack of business confidence and lack of growth prospects discouraged micro to mid-sized businesses from seeking relocation options. Market experience suggests this has changed over 2013-2015 with growing levels of enquiries and increased prospects of those enquiries being translated into occupations.
- 4.5 Against rising demand the supply of stock continues to decrease. Nationally, a stock of 23 million sqm was available at the end on 2014, a reduction of 15 percent on the end of 2013. The North West picture is similar to that across the rest of the country, with a dearth of good quality existing buildings in prime locations across all size parameters. As a consequence, occupiers are having to make compromises to

identify a building that works for them or satisfy their requirements by design and build solutions, with the resultant time delays for their operations. Design and build can also be quite expensive because the controlling developer makes its profit not only on the land sale, but also on managing the building process. If the design and build is for leasehold, occupiers also need to take a longer term view on lease length in order to secure design and build solutions which work for developers financially.

- 4.6 The later part of 2014 saw a return of speculative development in the 'big box' market for B8 logistics and B2 larger manufacturing. In the North West this was seen in speculative development for properties of more than 5,000 sqm in Trafford Park (Mosley Road), Hareshill Distribution Park in Heywood, Knowsley Industrial Park (Venus 110) and at Omega, Warrington. Nationally, 390,000 sqm of space was under development speculatively as of February 2015 (Jones Lang LaSalle, 2015).
- 4.7 However, with renewed interest from occupiers, pension funds and larger national investors (discussed further below), it is expected that 2015 will see the growth of speculative development at the smaller end of the market. The small numbers of developers who have built multi-let schemes on a wholly/part speculative development since the end of 2013 have been rewarded with high rental levels and freehold prices.
- 4.8 Supply is reducing relative demand and while some commentators argue that this is reducing the range and scope of incentives landowners are willing to offer tenants it has not, so far, led to any significant upward pressure on rental values. Tenants who are willing to acquire secondary multi-let space can still find landlords willing to offer flexible deals at attractive rents. At the start-up and micro business level, companies still want flexible terms and short lease lengths reflecting their inability to predict the longer term future for their company.
- 4.9 Owner occupiers are becoming more prevalent with the increase in business confidence encouraging firms to expand and review their occupational requirements. This is leading to greatly strengthened freehold demand, but local markets frequently lack the freehold stock to meet needs.
- 4.10 This may encourage firms to relocate from areas with limited options for owner occupancy, once those businesses reach a certain stage of maturity. However, this is dependent on the nature of the business. High value and high technology sectors will require a high grade of space which can only be found in certain locations. In lower

value added industries where quality buildings are of secondary importance there is greater flexibility and, if the company can access the finance, it may prefer to buy land direct and organise development of owner occupied space itself.

Warehouse (Logistics and Distribution) Market

- 4.11 Logistics and distribution refer to the movement and management of the flows of goods. This can be part of the operations of a single organisation or be part of a complex supply chain.
- 4.12 The logistics market consists of four different types of organisation:
- *Manufacturers and producers.* The organisations that manufacture/produce finished goods or semi-finished goods/components for input into a further production process
 - *Suppliers and distributors (wholesalers).* Organisations which purchase goods from manufacturers before selling them on to the retail sector
 - *Retailers.* The organisations that sell finished products direct to the general public, operating their own supply depots
 - *Logistics operators.* Organisations that transport and handle goods on behalf of the manufacturers, suppliers and retailers. These include small hauliers, multi-national logistics operators, shipping lines, ports and the rail freight operators.
- 4.13 The distributors of consumer goods, or the parts which make up or service those goods, organise their supply chains around large scale warehouses or distribution centres. Given their fixed nature and the large capital required to develop them, they can be considered as key geographically specific investments. It is therefore important that sites selected for large scale distribution centres are competitive and attractive to the logistics market. There are two types of distribution centre when defined by their functions.
- 4.14 National Distribution Centres (NDCs) act as inventory holding points, particularly for imported goods, before re-distribution to other stages in the supply chain. They are 'national' because they serve the whole of the UK from the one site. NDCs are generally occupied by retailers or their suppliers, particularly importers of electrical goods, clothing and other consumer cargo, who require facilities to consolidate

imported goods before re-distribution to either a Regional Distribution Centre or direct to an end user (retail outlet or domestic household).

- 4.15 Such national level facilities are rarely less than 50,000 sqm in size, with the very largest exceeding 80,000 sqm. Assuming a standard developer ratio of 3,900 sqm per hectare then a site which is able to support such a facility is unlikely to be less than 13 ha in size. Sites would generally need to be within close proximity to the strategic road network, say within 5 kilometres, with access arrangements that can support extensive HGV trips. As such facilities usually operate 24 hours a day, sites next to housing or other sensitive uses are not desirable.
- 4.16 Regional Distribution Centres (RDCs) or local level facilities are similar to NDCs in that they receive, hold and then re-distribute goods to the next stage in the supply chain. However, their primary role is to consolidate and re-distribute goods in shorter periods of time, rather than acting as inventory holding locations. Many RDCs are effectively a covered 'cross-docking' facility, where inbound 'bulk' homogenous consignments from NDCs are split into smaller consignments and consolidated with other cargo (including goods delivered direct to the RDC) for re-distribution (often in a matter of hours) in mixed full size unit loads i.e. limited or no storage function.
- 4.17 As a result local facilities are generally smaller than NDCs, but are unlikely to be less than 10,000 sqm. The largest RDCs will exceed 50,000 sqm. At 3,900 sqm/ha, ideally plots of more than 5 ha are needed for RDCs. As with NDCs, sites with good strategic road access, which are away from sensitive uses, would be preferable.

Market Growth

- 4.18 The short and medium market forecast is that, nationally, improving market conditions and online retail growth will see increased demand for prime logistics space. Demand will remain strong for prime logistics space, with the biggest online retailers continuing to fuel the demand. 2014 was a particularly strong year for the logistics market, with some 2.6 million sqm of space taken up, in units of 10,000 sqm or more. High growth is similarly forecast for 2015.
- 4.19 In the Liverpool City Region, Port growth is expected to be a key driver logistics demand, although the full impacts of this will not be realised for some years yet. The main measure of demand resulting from the expanding Port of Liverpool remains the Liverpool City Region Superport: Market Analysis Land and Property Study (2014).

The main conclusion of that study, discussed further in Section 2.0, is a need for a further 400 ha of primarily B8 land on high quality sites (500 ha to provide 25 percent headroom) over the next 20 years, across the Liverpool City Region and beyond. This is distinct from any further land the Port may have for its specific operations.

- 4.20 At the moment there is not enough high quality warehousing to satisfy demand, both Port related and general regional needs. As a result occupiers are holding off taking space and in some cases looking to acquire on a Design and Build basis. Those that do seek space are being driven by the lack of options to optimise their supply chains, i.e. bringing more of their operations onto single sites. As a result the average logistics deal, according to market commentators, is for 23,000 sqm of space on at least 10 ha of land, reflecting need for larger yards to hold greater fleets of HGVs. This will have implications for local authority land allocations as few can provide sites with multiple plots of this size at present.
- 4.21 The North West is reflective of this wider constrained market. While, the region does have a number of large logistics locations, including Omega at Warrington, Skelmersdale and Heywood in Rochdale (along with smaller options such as MN2.47(b): Atlantic Park in Netherton), the actual level of land at these locations can be limited. In part at least, this reflects tendency of developers in recent years to break up big sites with mixed use consents (housing, retail/leisure and a range of smaller B1/B2/B8 provision) to spread the risks and maximise values.
- 4.22 Despite this lack of currently available good quality space, it is anticipated that take-up will continue to increase throughout the next few years with returning consumer confidence ensuring that retailers, suppliers and related manufacturers come back to the market to satisfy growing demand. 2015 is expected to be a tight year in terms of supply but nationally development levels are starting to pick up with some 418,000 sqm expected to be delivered speculatively over 2015/16. So far speculative development has concentrated on established logistics locations such as Omega, Warrington, but it is expected that activity will move out to secondary sites as demand encourages developers/investors to look at higher risk options and occupiers seek relief from prime rent rises.
- 4.23 Developers, investors and landowners will be encouraged in this by the fact that values for B8 logistics uses are usually higher than for B1(a) offices or B1(c)/B2 industrial, and likely to remain so in the foreseeable future, for several reasons:

- The 'per unit' construction cost for building logistics accommodation is around half that of building an equivalent stock of office or industrial units. So if the cost of building 20,000 sqm of office space is £600/sqm then building 20,000 sqm of B8 space will only be £300/sqm as the internal/external fittings and design of the logistics property will be far less complex
- Large logistics properties usually represent a major investment for occupiers and they are therefore more willing to accept longer term leases, i.e. more than 10 years, on the property. This makes B8 premises a more secure long term investment for owners
- Rising demand generally and the need to secure premises in key geographic locations (near the Port and M57/M58 junctions in the case of Sefton) means that occupiers are willing to pay higher rents and values to secure the property they need. By comparison rents for smaller office and light industrial space remain more depressed as micro and small firms continue to recover from the recession.

Office Market

- 4.30 The first quarter of 2015 saw 135,000 sqm of floorspace taken up in the 10 main regional cities of the UK, while current named requirements are for some 458,000 sqm of space, a 20 percent increase on Quarter One 2014. Most of the regional markets now have less than three years supply of New and Grade A space available. At the end of the first quarter 2015, new and Grade A availability stood at a historic low of 193,000 sqm. This situation is most acute in the Birmingham Conurbation but can be seen in all regional office centres across the UK.
- 4.31 In 2013/14, Leeds, Glasgow and Cambridge were the key growth locations in terms of offices. In 2014/15 it is expected to be Manchester and Cardiff. At present at least, Manchester is overtaking Liverpool as the region's prime Grade A office location. North West office agents report that rental levels for prime and secondary office space in central Manchester are now almost double those of city centre Liverpool, with Manchester City Centre space achieving £340/sqm in June 2015, compared to £180/sqm in Liverpool City Centre.
- 4.32 2014/15 has seen a growing confidence on the part of investors to invest outside of London (discussed further below) and this has been led by the UK institutions, particularly for the office sector. Occupier demand is also growing. At the end of

2014, a Survey of Chief Financial Officers, undertaken by Deloitte UK, found that 72 percent of respondents are now considering an increase in staffing. As office based businesses traditionally keep a smaller amount of space 'surplus' at any one time than industrial firms, this is likely to lead to increase levels of premises demand.

- 4.33 Inward investment is driving demand for offices in the large cities. In 2014 the largest Manchester letting was for 6,000 sqm at ASK Developments' First Street to Trader Media. In other locations, such as Bootle and Chester, however, it remains a far smaller element of market activity.
- 4.34 Demand from public sector agencies is likely to remain relatively static, something which may limit growth in the public sector dominated Bootle Office Quarter. However, this is offset by high predicted growth in professional and support business services. Growth of some 1.1 million jobs across the UK is forecast in these sectors alone, with a particular focus on Telecoms, Media and Technology (Savills, 2015). If translated directly into floorspace, using standard HCA jobs density figures, this generates a national need for some 92,000 sqm of extra office floorspace.
- 4.35 While investment, inward investment and occupier activity will focus on Manchester and Liverpool the severe lack of available stock, in particular Grade A stock, is encouraging organisations to look at assets in strong secondary locations. In the North West this is already being felt in Salford Quays, where the average price per sqm increased by 5 percent to £220, and Warrington, which saw a 3 percent rise to £165 per sqm (Savills, 2015).
- 4.36 In the Liverpool City Region, initial beneficiaries of this include South Liverpool and particularly Knowsley which saw some 3,900 sqm of take up in 2014, compared to 2,500 sqm in 2013. This was dominated by a single deal, the largest out of town letting deal outside of the city fringe, with Alfred Knight taking 2,923 sqm at Pegasus House in August 2014 (Professional Liverpool Property Group, 2015). By comparison, take up in Bootle, St Helens and Waterloo was less than 100 sqm each.
- 4.37 Generally, property stakeholders believe that the development pipeline is approximately 18 months behind the current demand curve. In the short term, this will mean reduced choice for occupiers, with pre-lets likely to be the only option in many cases.

- 4.38 Increased levels of demand are beginning to encourage development activity and nationally, speculative development levels increased 42 percent over 2014 (Savills, 2015), although it is still well below pre-recession levels. At present, most office development still requires an element of pre-let or government funding to secure a start. However, it is expected that this may change over 2015, at least for schemes in good locations and of desirable sizes, tenures, etc.
- 4.39 However, while there is a shortage of high grade space, there remains a significant regional stock of second hand offices. In the short term this stock will actually grow as companies seek to upgrade to better options. A growing market will encourage refurbishments, but it is not clear if increased pressure for office to residential conversions is also likely. In South Sefton, prior notification application for a proposed change of use from office to 180 dwellings (studios, one and two-bed flats) was submitted to Sefton Council in 2014 at Daniel House, Stanley Road in Bootle Town Centre. This conversion is now underway. Further conversion proposals are likely but relatively low house prices in South Sefton may also limit the scale and range of change.

Investment Market

- 4.40 The first quarter of 2015 has been marked by an extensive increase in the UK property investment market. Property research organisation CoStar report 850 property deals in Quarter One 2015, totalling £16.8 billion. This represents a nine-year first quarter high and a 12 percent increase from Quarter One 2014. As the second quarter of 2015 continues, property remains highly attractive and it is expected that 2015 will eclipse 2014 as a record year for investment.
- 4.41 Several trends distinguish the modern property investment market from that seen prior to the recession. One is the rise of multi-region portfolios, i.e. large deals in which the stock of premises purchased was spread across multiple UK regions rather than focused on a specific established centre, such as London. This reflects a greater understanding of offer available in the UK regions by large national and international investors who are looking to capitalise on competitive pricing in more peripheral locations. For those with the capital to invest in a geographically broad portfolio, the risks are dispersed while the prospect of a large return overall is increased.

- 4.42 2015 has also seen investors consider a broader range of assets, beyond the big three of office, retail and industrial/warehouse. 2014/15 has seen a particular boom in investment in student accommodation reflecting growing student numbers, particularly overseas students, against a shortage of stock. The hotel sector has also seen record investment, with £1.5 billion recorded in 39 deals in Quarter One 2015 (CoStar, 2015). This reflects the ongoing strength of the tourism industry since the London 2012 Olympics. The ONS estimates that tourism has accounted for one third of jobs created over 2010-2013 and 2014 saw 34.8 million tourist visits to the UK. Increased by 5 million (6 percent) on 2013. The growth of mass chain hotels, such as Travelodge and Premier Inn, is opening up this sector to the sort of large and dispersed portfolio investments now desirable.
- 4.43 Finally, although pricing in the Capital remains competitive, a dwindling pool of prime assets in London, and an increasing appetite for risk in an improving market, is encouraging investors to look to the regions for investment opportunities. The North West, along with the South West and West Midlands, have been the greatest net beneficiaries of this. According to some commentators the North West saw a 40-45 percent improvement on investment in Quarter One 2014 over Quarter One 2014.
- 4.44 Estimates made by Lambert Smith Hampton suggest that one out of every eight pounds invested in UK commercial property is invested in the North West. This makes it one of the busiest markets outside London and the South East. While the 'prime' centres of Manchester and Liverpool continue to be the foci of regional investment, investors are increasingly willing to look at opportunities in secondary locations which add value to a broader portfolio. In this context, 'added value' means higher yields and positive occupier sentiments for growth.
- 4.45 Considering the three main investment sectors (office, retail, industrial) individually, the following summaries can be made of their recent performance.

Office

- 4.46 Quarter Four 2014 saw something of a frenzy in office investment, with some £11.4 billion spent (CoStar, 2015), and as a result demand in 2015 is expected to be more subdued. London still dominates, accounting for 68 percent of investment in Quarter One 2015, but this is down from some 78 percent in 2014. Regional investment is growing and while this still overwhelmingly benefits the big regional cities, including Liverpool and Manchester, the prospects for secondary locations are improving.

Retail

- 4.47 Retail investment is increasing as a share of total investment. Retail warehouses are particularly popular giving a high rate of return per sqm. Foodstores also remain popular, but trade is often within a 'closed market' of the big supermarket chains and a handful of institutional investors. Following a strong year in 2014, evidence suggests shopping centre investments may have peaked as most of the trade in prime locations has now taken place.

Industrial

- 4.48 Industrial investment remains a solid prospect. CoStar report that investment in this sector has exceeded £1 billion/quarter for the last seven quarters, with no sign of slowing. Investment in warehouses remains a strong prospect, with over £3.5 billion transacted in 2014.
- 4.49 In terms of the sustainability of this current growth, commentators do suggest that 2015/16 may be the peak of the current cycle. The view is that the market is moving to the next phase of trading, reflecting a growing appetite for stock in secondary and higher risk locations. This is giving local landlords stronger opportunities to sell up to larger investors, and increasing the dominance of big portfolio holders regionally. A stronger peripheral market is encouraging owners to invest in previously neglected properties in the hope of attracting investors and distressed sales are no longer a key feature of trading that they were. Generally, it is expected that investors, large and small, will be more willing to invest in a range of geographic locations over the next few years. However, they will also become more demanding of the quality of the assets they seek and more price sensitive, particularly if interest rate rises become more likely.

Public Sector Property Enquiry Analysis (*Invest Sefton*)

- 4.50 Invest Sefton is the enterprise, business support and inward investment service of Sefton Council. Part of the Council's Planning and Economic Regeneration Department, it leads on and supports economic growth in the borough. It collects property enquiries information, to inform demand considerations, and has been able to provide data for the period 2012-2015.
- 4.51 This enquiries data is distinct from that used in the 2012 Employment Land and Premises Study Refresh which was sourced from the Liverpool LEP, and is not

readily available for tis Update Study. The two data sources use different collection methodologies and classification criteria, and are not comparable.

4.52 Table 20 sets out a year by year analysis of the sector type of property enquiries received by Invest Sefton for the Borough between 1st January 2012 and 3rd July 2015. Over this period some 419 enquiries were received, with industrial premises accounting for 30 percent. Reflecting the national recession and recent recovery, enquiries are higher in 2014 than in 2012 and particularly in 2014. This was led by sizable increases in demand for industrial/warehouse, office and leisure premises. The strong total for the first half of 2015, already close to the annual total for 2013, suggests that 2015 will see a high level of property enquiries, possibly exceeding 2014.

Table 20 – Invest Sefton Enquiries 2012-2015 Type

Year	Industrial/ Warehouse	Office	Retail	Leisure	Managed/ Serviced Office	Site	Total
2012	28	16	30	13	4	21	112
2013	26	11	20	13	4	10	84
2014	46	27	28	22	4	14	141
2015*	26	15	12	18	4	7	82
Total	126	69	90	66	16	52	419
Percent	30	16	21	16	4	13	100

**Part year*

Source: Invest Sefton, 2015

4.53 The data for managed/serviced offices is questionable as it appears to show identical levels of enquiries for the last three and a half years (4 per year). However, it is clear that demand for serviced office space is low when compared to other uses.

4.54 Although enquiry numbers took a significant dip in 2013 from 2012 (112 to 84), a sudden increase in 2014 followed by a strong running total for 2015 would seem to indicate that enquiry numbers look set to increase in at least the next six months. Enquiries peaked in 2014 with industrial/warehouse and leisure enquiries almost doubling and office enquiries seeing a number almost three times as high. Regular office premises possess a 16 percent share of the enquiry total. Retail requirements

account for 21 percent of the total and demand for retail units has remained relatively strong throughout the period shown.

4.55 Table 21 breaks down the available enquiry data by size. It must be noted however, that almost half of those enquiring through Invest Sefton did not give a size. In addition no data is available as to where in the Borough the enquiring businesses would wish to locate.

Table 21 – Sefton Council Enquiries 2012-2015 Sizes

Type	Size band, sqm						Total
	Undisclosed	0-93 sqm	94-232 sqm	233-465 sqm	466-929 sqm	930+ sqm	
Industrial/ Warehouse	43	6	11	23	15	28	126
Office	33	16	5	5	7	3	69
Retail	50	23	9	3	4	1	90
Leisure	45	4	3	2	6	6	66
Managed/ Serviced Office	6	6	1	-	3	-	16
Site	23	-	-	1	4	24	52
Total	200	55	29	34	39	62	419
Percent	48	13	7	8	9	15	100

Source: Invest Sefton, 2015

4.56 In terms of industrial and warehouse demand, the larger number of enquiries are for premises greater than 232 sqm in size. Although this may partially reflect the fact that local micro firms, requiring smaller space, are not making property enquiries through Invest Sefton it is still evidence of demand for larger industrial/warehouse premises. Units of more than 929 sqm appear particularly desirable.

4.57 In comparison demand for office and retail premises is weighted more heavily towards the 0-93 sqm category, suggesting that demand for these types of premises remains dominated by smaller businesses.

- 4.58 The data does not provide a separate breakdown of land requirements by hectare so it is only possible to say that most of those enquiring for land, who gave a site size, want plots of 930 sqm or more.

Currently Available Supply

- 4.59 A schedule of the vacant floorspace being marketed in the study area (as at July 2015) has been compiled mainly from physical survey, a trawl of commercial property agents' websites and consultations with agents. The marketed space is taken to be a reasonably close approximation to that which is vacant – although there may be occupiers waiting for interest in their property before moving, and empty units not actually being marketed. The schedules may also exclude units being marketed informally, i.e. by the owner directly, without an agent. The schedules for industrial (including warehouses and workshops) and offices have been included in Appendix 2.

Industrial/Warehousing

- 4.60 Table 22 details that there are currently 118 available premises in the Borough – with their total floorspace amounting to 81,607 sqm. This compares to a stock of 102,149 sqm of available floorspace recorded in the 2012 Employment Land and Premises Study Refresh in a similar number of premises (127). 93 percent of the currently available floorspace (82 percent of the stock of properties) is located in South Sefton. This leaves only 7 percent of floorspace (18 percent of properties) in the North.
- 4.61 Across the Borough there is provision in all size bands. North and South Sefton have reasonable availability in all categories up to 1,000 sqm, relative to their total property offers, extending to 2,000 sqm in South Sefton. Formby Industrial Estate appears fully occupied, an important point to note given the additional land and premises proposed north and south of this Employment Area.
- 4.62 Premises of more than 2,000 sqm, which might provide warehousing and logistics options are primarily found with the A5036 and A59 Corridor areas of Netherton and Aintree. As was the case in the 2012 Employment Land and Premises Study Refresh the largest unit in the Borough is the 8,431 sqm Unit A, Big Ft2, MN2.47(b): Atlantic Park, Dunning's Bridge Road. This is followed by the 6,133 sqm North West Training Council building at Heysham Road Industrial Estate. Together these two properties account for 19 percent of the available premises supply in South Sefton. There are

two other large units on the market in the Dunnings Bridge Road Area and two at Aintree Racecourse Business and Retail Park. A single unit of 5,000 sqm is also available in Seymour Street, Bootle.

Table 22 – Amount of Vacant Industrial/Warehouse Property in Sefton

Property		Size Band, sqm						Total	
		0-100	101-200	201-500	501-1,000	1,001-2,000	2,001-5,000		5,000+
North Sefton									
Southport	Floorspace, sqm	385	1,109	1,246	1,429	1,800	-	-	5,969
	Number of Properties	6	8	4	2	1	-	-	21
Sub-total	Floorspace, sqm	385	1,109	1,246	1,429	1,800	-	-	5,969
	Number of Properties	6	8	4	2	1	-	-	21
South Sefton									
Aintree	Floorspace, sqm	-	-	2,196	1,748	5,055	5,841	-	14,840
	Number of Properties	-	-	7	2	3	2	-	14
Bootle	Floorspace, sqm	316	927	6,363	3,795	3,102	5,000	-	19,503
	Number of Properties	5	7	20	5	2	1	-	40
Maghull	Floorspace, sqm	-	-	491	-	-	-	-	491
	Number of Properties	-	-	1	-	-	-	-	1
Netherton	Floorspace, sqm	679	1,416	2,886	5,082	5,400	10,777	14,564	40,804
	Number of Properties	8	10	8	7	4	3	2	42
Sub-total	Floorspace, sqm	995	2,343	11,936	10,625	13,557	21,618	14,564	75,638
	Number of Properties	13	17	36	14	9	6	2	97
Total	Floorspace, sqm	1380	3,452	13,182	12,054	15,357	21618	14564	81,607
	Number of Properties	19	25	40	16	10	6	2	118

Source: BE Group, 2015

4.63 Table 23 below illustrates a breakdown, by location, of industrial and warehouse properties currently available in all three geographical areas. This is compared to the availability recorded in the 2012 Refresh Study. Some points to note include:

- North Sefton – This study has found a much lower level of availability in Southport’s backland sites than was the case in 2012, also at Blowick Industrial Estate. Balmoral Business Centre (former Philips Factory), Southport, on the market in 2012, is now no longer available and proposed for housing uses in the Local Plan
- South Sefton – Availability at Bridle Way/Deltic Way, as well as the Port Industrial Area, is far lower than in 2012. Generally, the supply emphasis has moved to Brookfield Business Park, Netherton along with Millers Bridge and Brasenose Industrial Estates, Bootle. As in 2012 there is reasonable availability on Aintree Racecourse Business and Retail Park.

Table 23 – Location of Vacant Industrial/Warehouse Property 2012 and 2015 Comparisons

Employment Area, Settlement	2012	2015
North Sefton		
Balmoral Business Centre (former Philips Factory), Southport	6	0
Blowick Industrial Estate, Southport	8	0
Crossens Way, Southport	1	0
Crowland Close, Southport	0	1
Crowland Street, Southport	0	3
Dalweb Industrial Park, Southport	0	1
Enterprise Business Park, Russell Road	0	1
Kensington Industrial Estate, Southport	3	5
Portland Street Trading Estate, Southport	0	5
Slaidburn Crescent, Southport	2	0
Southport (backland sites)	13	2
Southport Town Centre	1	3
South Sefton		
Aintree Racecourse Retail and Business Park, Aintree	12	10
Bechers Business Park, Netherton	0	2

Employment Area, Settlement	2012	2015
Bootle (Outside of the Employment Areas)	5	0
Bootle Town Centre/Edge of Centre	1	8
Brasenose Industrial Estate, Bootle	0	10
Bridle Way Industrial Estate (including MN2.47(b): Atlantic Park), Netherton	16	2
Brookfield Business Park, Netherton	0	19
Brookfield Court, Netherton	0	1
Brookfield Trade Centre, Netherton	0	1
Deltic Way Industrial Estate, Netherton	13	0
Dunnings Bridge Road	0	4
Farrier's Way Industrial Estate, Netherton	0	7
Heysham Road Industrial Estate, Netherton	4	0
Land and premises surrounding Acorn Way, Bootle	4	0
Liverpool Road, Maghull	0	1
Maritime Enterprise Park, Bootle	9	9
Millers Bridge Industrial Estate, Bootle	0	13
Orrell Mount/Kingfisher Business Park, Bootle	7	0
Port Industrial Area, Bootle	12	0
Sefton Business Park, Netherton	0	1
South Sefton Business Centre (and surrounding premises), Bootle	10	0
The Boxworks, Heysham Road, Netherton	0	7
Vesty Business Park, Netherton	0	2
Total	127	118

Source: BE Group, 2015

- 4.64 Table 24 assesses the quality of the available properties, detailed in categories of either 'good', 'moderate' or 'budget'. Both North and South Sefton have a spread of all qualities of premises. However in South Sefton, the areas of Aintree and Maghull currently have only moderate properties available.
- 4.65 The percentage of good quality premises in the more concentrated North Sefton is higher than that of South Sefton (38 percent compared to 12 percent in South

Sefton). However, both areas have a comparable amount of budget properties (4-5 percent of their respective totals).

- 4.66 Across all areas, budget premises account for only 4 percent of those currently marketed, with good premises accounting for 17 percent. In all areas the majority of premises are of a moderate quality.
- 4.67 25 percent of premises in Bootle are of a good quality, with the majority of those being found in the Brasenose Industrial Estate and Millers Bridge Industrial Estate. This compares with only 5 percent of good-rated premises in Netherton (the majority, 93 percent, being identified as moderate).

Table 25 – Quality of Marketed Industrial Property

Area	Quality		
	Good	Moderate	Budget
North Sefton			
Southport	8	12	1
South Sefton			
Aintree	-	14	-
Bootle	10	27	3
Maghull	-	1	-
Netherton	2	39	1
Total	20	93	5

Source: BE Group, 2015

- 4.68 As Table 26 shows, 89 percent of the total properties marketed are available on a leasehold tenure. 3 percent of the total properties are available freehold, and 7 percent of the total properties are available for sale or to let.

Table 26 – Tenure of Marketed Industrial Property

Area	Tenure		
	Leasehold	Freehold	Either
North Sefton			
Southport	18	3	-
South Sefton			
Aintree	14	-	-

Bootle	38	-	2
Maghull	1	-	-
Netherton	35	1	6
Total	106	4	8

Source: BE Group, 2015

Offices

4.69 Table 27 shows that there is a total of 32,193 sqm vacant floorspace (and 97 premises) across Sefton. In comparison to vacant industrial space. This is a third more than was available in 2012 – 20,342 sqm of floorspace in 98 premises.

Table 27 – Amount of Marketed Office Property

Property		Size Band, sqm						Total	
		0-100	101-200	201-500	501-1,000	1,001-2,000	2,001-5,000		5,000+
North Sefton									
Southport	Floorspace, sqm	556	780	2,061	-	1,358	6,177	-	10,932
	Number of Properties	14	6	7	-	1	2	-	30
Formby	Floorspace, sqm	108	-	-	1,374	-	-	-	1,482
	Number of Properties	3	-	-	2	-	-	-	5
Sub-total	Floorspace, sqm	664	780	2,061	1,374	1,358	6,177	-	12,414
	Number of Properties	17	6	7	2	1	2	-	35
South Sefton									
Aintree	Floorspace, sqm	160	478	1,082	506	-	-	-	2,226
	Number of Properties	8	3	3	1	-	-	-	15
Bootle	Floorspace, sqm	-	857	4,502	-	-	4,459	-	9,818
	Number of Properties	-	5	18	-	-	1	-	24
Crosby	Floorspace, sqm	62	447	-	-	-	-	-	509
	Number of Properties	2	3	-	-	-	-	-	5

Property		Size Band, sqm						Total	
		0-100	101-200	201-500	501-1,000	1,001-2,000	2,001-5,000		5,000+
Maghull	Floorspace, sqm	304	-	-	-	-	-	-	304
	Number of Properties	5	-	-	-	-	-	-	5
Netherton	Floorspace, sqm	227	571	272	2,602	3,250	-	-	6,922
	Number of Properties	3	4	1	3	2	-	-	13
Sub-total	Floorspace, sqm	753	2,353	5,856	3,108	3,250	4,459	-	19,779
	Number of Properties	18	15	22	4	2	1	-	62
Total	Floorspace, sqm	1,417	3,133	7,917	4,482	4,608	10,636	-	32,193
	Number of Properties	35	21	29	6	3	3	-	97

Source: BE Group, 2015

- 4.70 A significant number of total office suites (88 percent of the total) across the Borough can be found within categories up to 500 sqm. Only 12 percent of the total suites are 501 sqm or larger with the largest available being a suite in St. Hugh's on Stanley Road, Bootle (4,459 sqm) and the second and third largest being Office 1 (1,718 sqm) and Office 2 (1,532 sqm) in Caspian House on MN2.47(b): Atlantic Park.
- 4.71 North Sefton also has a share of office suites above 501 sqm. Included in this figure are the three largest suites currently available – Floors 1 and 2, 377 Lord Street (3,690 sqm); Building A in Southport Business Park (2,487) and 5-7 Duke Street (1,358).
- 4.72 In the South, premises with a size of 0-500 sqm occupy 88.7 percent of the total premises, with the category of 201-500 sqm holding the majority share in terms of premises (35.5 percent) and 5,856 sqm (29.6 percent) of the area's total floorspace.
- 4.73 As Table 28 details, available office space in the North is spread across a number of secondary locations based in and around Sefton Town Centre, as was the case in 2012.

4.74 In South Sefton, the focus is in central Bootle, in Bootle Town Centre, the Office Quarter and immediately adjacent Employment Areas. is another supply focus in the South. This is similar to the position in 2012, even if the buildings which have available suites have changed somewhat. Aintree Racecourse Retail and Business Park and Bridle Way Industrial Estate (including MN2.47(b): Atlantic Park), Netherton remain key sources of offices in industrial estate/business park locations.

Table 28 – Location of Vacant Office Property 2012 and 2015 Comparisons

Employment Area, Settlement	2012	2015
North Sefton		
Ainsdale	1	0
Balmoral Business Centre (former Philips Factory), Southport	0	0
Blowick Industrial Estate, Southport	3	0
Crossens Way, Southport	1	0
Crowland Street Commerce Park	0	1
Formby Town Centre	0	2
Southport (Edge of Centre)	15	5
Southport Business Park	1	1
Southport Town Centre	26	17
The Gallery, Formby	0	3
Victoria Court, Southport	0	6
South Sefton		
Aintree Racecourse Retail and Business Park, Aintree	10	10
Bootle (Outside of the Employment Areas)	1	4
Bootle Town Centre	7	4
Bridle Way Industrial Estate (including MN2.47(b): Atlantic Park), Netherton	13	6
Crosby Town Centre/Edge of Centre	7	5
Deltic Way Industrial Estate, Netherton	0	0
Heysham Road Industrial Estate, Netherton	2	0
Maghull Town Centre/Edge of Centre	5	5
Orrell Mount/Kingfisher Business Park, Bootle	1	0
Sefton Lane Industrial Estate, Maghull	4	0

Employment Area, Settlement	2012	2015
South Sefton Business Centre (and surrounding premises), Bootle	1	7
St. Martin's House, Bootle	0	17
The Triad Building, Bootle	0	4
Total	98	97

Source: BE Group, 2015

- 4.75 Table 29 assesses the quality of the available office premises, detailed, as before, in categories of either 'good', 'moderate' or 'budget'. All three sub-areas have at least some good quality premises, but budget options are very limited. Across the Borough, 77 percent of the premises are classified as moderate, 21 percent are classified as good and only 2 percent are classified as budget premises.

Table 29 – Quality of Marketed Office Property

Area	Quality		
	Good	Moderate	Budget
North Sefton			
Southport	3	26	1
Formby	3	1	1
South Sefton			
Aintree	8	7	-
Crosby	-	5	-
Bootle	1	23	-
Maghull	-	5	-
Netherton	5	8	-
Total	20	75	2

Source: BE Group, 2015

- 4.76 90 percent of available premises are being offered with a leasehold tenure. A modest seven properties are available freehold, while three offices in Southport are available for sale or to let. Thus 10 percent of the current supply is potentially available to buy.

Table 30 – Tenure of Marketed Office Property

Area	Tenure		
	Leasehold	Freehold	Either

North Sefton			
Southport	22	5	3
Formby	5	-	-
South Sefton			
Aintree	15	-	-
Bootle	22	2	-
Crosby	5	-	-
Maghull	5	-	-
Netherton	13	-	-
Total	87	7	3

Source: BE Group, 2015

Valuation Office Data

Industrial

- 4.77 According to the latest Valuation Office (VO) statistics (2012) there are 1,700 industrial hereditaments in the study area, totalling 869,000 sqm. Out of all this space there are 118 marketed premises totalling 81,607 sqm (see Table 30 above). This suggests an overall 'occupancy rate' for Sefton of 90.6 percent by floorspace. By premises numbers, the 'occupancy rate' is 93.1 percent.
- 4.78 Generally, occupancy rates of 90-95 percent can be considered high and suggest that, subject to the natural churn of businesses expansion and relocation, most schemes in the Borough are relatively well occupied.

Offices

- 4.79 There are 860 office hereditaments in the study area, totalling 319,000 sqm. Out of all this space there are 97 marketed premises totalling 32,193 sqm (see Table 30 above). This suggests an overall 'occupancy rate' for the study area of 89.9 percent by floorspace. By premises numbers the overall occupancy rate is 88.7 percent.
- 4.80 However, these figures will be skewed unfavourably by serviced office schemes in the study area which are probably rated as single hereditaments.

Property Market – Stakeholders

- 4.81 This section considers the more detailed issues related to supply and demand for industrial and office property within the study area as a prelude to assessing the future need for land. The comments of stakeholders active in Sefton's industrial and office property markets are analysed. The industrial market refers to accommodation for manufacturing, storage, distribution and warehousing purposes including smaller workshop premises.
- 4.82 Ten private sector stakeholders were contacted by telephone for an informal discussion of the property market. To protect anonymity of individuals and organisation, names of commentators are not revealed.
- 4.83 These are stakeholders who are actively engaged in the sale and/or lease of industrial, office and retail premises 'on the ground' and so have good first-hand knowledge of the market in Sefton. The views they give provide useful practical input which balances the higher level evidence provided by forecasting and policy analysis.
- 4.84 Stakeholders were contacted by telephone, or face-to-face, to undertake a semi-structured interview which focused on the following questions:
- What units are you currently marketing? What are businesses looking for?
 - Review property offer – office, industrial, land – is there enough property and is it good enough quality?
 - Are they mainly freehold or leasehold – is there a shortage of either one of these?
 - How quickly are units letting? What are popular sizes? What sizes do not find occupiers?
 - Are certain areas more popular than others?
 - Is there enough land? Where should further land be allocated?
 - Property requirements of emerging businesses and sectors? Any noticeable trends, e.g. increasing need for quality, smaller units, etc?
 - Weaknesses and shortfalls in existing offer – what can be done about it?
 - Are there any key aspects that the Council needs to address? What is the private sector's perception of the place? How is Sefton viewed in terms of inward investment?
 - What is the average price per square foot/square metre for the office/industrial premises you represent?

4.85 Their views have been summarised in a series of tables. Table 31 provides a breakdown of the general comments received with regard to industrial, office and retail land in Sefton.

Table 31 – Property Market Comments – Land

Contact	Comment
National Agent	Strong emphasis on land development within a 25-mile radius of the expanding Liverpool2 Super Port. Acquisition of land seems to have improved post-general election, with businesses settling into the idea of long-term land prices under the new Government. They are now more likely to settle down – although the same can be said for both industrial and office premises.
National Agent	Consistently strong level of investment from local developers, taking advantage of the Peel Ports, Liverpool2 development close by.
Local Agent	The area is now better in terms of investment in development land. Feels that transport limitations in the Borough means that locations such as M2.47(b): Atlantic Park lose out large-scale schemes such as Omega in Warrington and others in Liverpool City Centre. In general, there seems to be enough land, it is just the locational disadvantage letting the area down. This issue sits alongside hopeful future plans involving the Port.
National Agent	Plenty of land available around the Port area, but land is not coming forward and the supply is not therefore addressing the current shortage of small to mid-range sized industrial premises. There is a need for more industrial land to complement Sefton's ever expanding industrial property market. The Council might benefit from being more transparent about grant availability, as well taking a more proactive approach to communication with the private sector.

Source BE Group, 2015

4.86 Table 31 provides a summary of the comments received from stakeholders with regards to the local industrial property market.

Table 31 – Property Market Comments – Industrial/Warehouse

Contact	Comment
National Agent	Currently marketing premises on MN2.47(b): Atlantic Park (Alaska House, Caspian House, Big Ft2 and other large industrial premises). Currently in need of, via instructions, premises around the 8,000 sqm mark within three miles of the Port, but nothing is available. There is an undersupply of industrial premises up to 1,000 sqm across both Sefton and the wider Liverpool City Region. This is unfortunate as the demand for properties within this size range are becoming increasingly sought after. Vesty Business Park and premises on Bridle Way (which are all around 600 sqm) are full, with no real alternatives at present. The primary industrial hubs are areas surrounding the Port, anywhere to the North of Derby Road and the surrounding areas of Dunnings

Contact	Comment
	<p>Bridge Road. Can expect to market properties at £30-£60/sqm depending on size and quality. South Sefton is now home to a number of trade counter-style businesses.</p>
National Agent	<p>Markets Aintree Racecourse Business and Retail Park Industrial space outside of Liverpool City Centre is in more demand, especially in Aintree Racecourse Business and Retail Park (they specifically have one unit just completed here and another three under offer, indicating just how busy the area is in regards to industrial lettings). There is a lot of demand for premises up to 10,000 sqm (the out-of-area Knowsley Academy Business Park is also proving popular for businesses wanting to migrate out of the City Centre). There is a definite trend towards modern, high-specification industrial premises to let (offered at around £47.5-£65.0/sqm). Premises of around 1,000 sqm are becoming popular amongst trade counter-style businesses (e.g. Screw Fix at Aintree Racecourse Business and Retail Park). Businesses are gravitating towards high quality space, preferably with warehouse storage facilities. Older units, even those of a good size and in decent condition, are becoming increasingly harder to let. Some they have owned for years with no viewings.</p>
National Agent	<p>Has recently identified a market gap for large premises (3,500 sqm plus) in Sefton for B2 and B8 operations. This lack of availability is evident in an increasing number of large businesses opting to settle in Manchester or Liverpool over more traditional industrial locations like Bootle and Netherton. Current client list does not seem to be actively searching for premises (industrial, office or retail) in Sefton. Across the Liverpool City Region generally, mid-range units of around 50-100 sqm let quickly.</p>
National Agent	<p>Agents for MN2.47(b): Atlantic Park Most enquiries received are from national logistics firms looking for 10,000-50,000 sqm in new build logistics space. However, also get smaller enquiries from Merseyside industrial/warehouse companies looking for 5,000-6,000 sqm. Industrial rents on site range from £15-17/sqm to £50/sqm dependant on the level of fit out and new development required.</p>
National Agent	<p>Currently marketing industrial units in the Port area and on Canal Street, Bootle. Seems to be a lack of large, high quality premises as a result of limited new speculative builds in the last 15 years or so. Port expansion is increasing demand in the area. This is boosting logistics demand but also increasing requirements for small and mid-sized industrial premises for businesses supporting Port operations or operating with the supply chains of associated large businesses. Can expect to charge around £55.0/sqm for a brand new, modern industrial unit.</p>

Contact	Comment
Regional Agent	<p>Demand has picked up rapidly since 2012, and there is good demand from companies across Merseyside here. Requirements are for the full range of industrial premises from 50 to 5,000 sqm. Rents are £47-£57/sqm for reasonable quality space.</p> <p>Also increased demand for larger logistics units, up to 50,000 sqm. A new market for the area, which has largely emerged from Port growth. However, as MN2.47(b): Atlantic Park is the only location which could accommodate this (and can only accommodate one such occupier) there is no real scope to develop a logistics market in Sefton (away from the Docks). It is therefore assumed that most such need in northern Merseyside will continue to be accommodated at Knowsley Industrial Estate.</p> <p>Demand now exceeds supply for industrial space as there has been little development in South Sefton since the completion of Vesty Business Park in 2009. In particular there is a shortage of moderate/good quality units of 500-800 sqm. The market could therefore support another industrial development similar to Vesty.</p>
Regional Agent	<p>The lack of recent development in the Dunnings Bridge Road Corridor is leading to a shortage of reasonable quality industrial properties. Demand is for smaller workshops of 0-200 sqm, for local firms and units of greater than 500 sqm units for sub-regional occupiers.</p> <p>Established firms are looking for leases of 2-5 years, along with some freehold properties. Start-up business are looking for very short (6 month leases), but are usually willing to extend those leases if the business proves viable.</p> <p>Dunnings Bridge Road/Bridle Way and Bootle (between the Town Centre and the Port) are key industrial locations in Merseyside. Average rents are £20-50/sqm.</p>
Local Agent	<p>Marketing premises in North Sefton The market is currently very buoyant and anything around 300-500 sqm lets quickly, especially standalone units and units located in established industrial locations such as Crowland Street and Slaidburn Crescent in North Sefton. Formby Industrial Estate is another strong industrial location although occupiers sometimes overlooking as it can be seen as primarily a retail/trade area Outside of these choice markets, the local market is just not set up to accommodate larger industrial industrial space in North Sefton. Warehouses can go from £20-£60/sqm dependent on quality (e.g. building infrastructure, air conditioning, etc.) more so than location. They currently marketed units all over the area – from large trading estates to the back of residential plots.</p>

Source BE Group, 2015

- 4.87 Table 32 provides a summary of the comments received on the local office property market.

Table 32 – Property Market Comments – Office

Contact	Comment
National Agent	<p>Office market currently suffering in the area, partly due to a lack of demand and partly due to a lack of variety available. There is very little within Sefton which provides both good quality and size, i.e. the large offices in Bootle tend to suffer from quality and specification issues.</p> <p>Feels that Liverpool based businesses remain wary of looking beyond the City Centre and adjacent Liverpool Waters for space, unless they have logistics requirements.</p>
National Agent	<p>Tends to market multi-occupied, large office spaces in Sefton, on a leasehold basis. General rents achieved are around £85/sqm, although a premium might be offered at around £10/sqm.</p> <p>There is a general lack of office space in the Sefton area, generally suites of 50-200 sqm</p> <p>Businesses are looking towards the Town Centres where they look for smaller, cheaper premises, rather than occupying Grade A spec premises out-of-town.</p> <p>The Council might look to address the public realm in, for example, Bootle as a key to revitalising Sefton's property market. Reductions in business rates and a drive to generate employment would benefit all realms of commercial property.</p> <p>Start up's tend to gravitate towards Liverpool City Centre and in Enterprise Parks where rates are cheaper in the smaller premises.</p> <p>In general, there is not enough good quality premises and units let slowly a lot of the time.</p>
National Agent	<p>Currently marketing premises on Canal Street.</p> <p>Seems to be a lack of large, high quality premises as a result of no new speculative builds in the last 15 years or so.</p> <p>Most premises in the area are leasehold tenures, but lack of freehold properties doesn't seem to be an issue. Rather the need is for more the quality of those available on leasehold.</p> <p>Can expect to quote around £10/sqm for modern office spaces.</p>
Local Agent	<p>Currently a struggling market, but better than it has recently been.</p> <p>There is lots of available space in Southport Town Centre – especially in upper floor accommodation – ground floors can be let fairly easily.</p> <p>Because of fluctuations in the market, there is a tendency to offer large incentives – agents are having to learn to adapt to the market as is.</p> <p>Offices can be offered at anything from £80-£150/sqm, but it is difficult to gauge as there are many more quality variables.</p>
National Agent	<p>There is a tendency to offer office space as part of an industrial purchase – with incentives as rents per sqm are generally larger – anywhere up to around £100/sqm.</p>

Source BE Group, 2015

4.88 Understanding of the local market was informed by a number of consultees comprising from four national and three local agents. Discussions focused on the level of sales and rental activity, the broad locational distribution of demand and the anticipated future trends and requirements.

- 4.89 The consensus is that, some two years after the end of the recession, demand for industrial and warehouse premises is reasonable. In terms of logistics and larger B2 manufacturing occupiers, agents working across the North West are receiving requirements for units of up to 50,000 sqm, which are of relevance to Sefton. Agents for MN2.47(b): Atlantic Park have particularly seen demand for properties of that scale. It should be noted, however, that these are usually requirements from national businesses who may be considering a range of locations in the region.
- 4.90 More locally specific requirements are for production and warehouse space of up to 5,000-10,000 sqm. Businesses specifically looking at Sefton generally want units close to the Port, emphasising the importance of that facility to the Borough.
- 4.91 The local market appears to require industrial units of up to 500 sqm while demand for workshops of less than 200 sqm appears particularly healthy. However, stakeholders generally feel that there are no unpopular sizes and that local tenants can be found for any industrial/warehouse space of between 50 and 5,000 sqm. Agents for Aintree Racecourse Retail and Business Park indicate that premises of around 1,000 sqm are becoming popular amongst trade counter-style businesses. Demand is for a mix of leasehold and freehold options.
- 4.92 In North Sefton the market operates at a smaller scale, but remains buoyant and anything around 300-500 sqm in size can let quickly, especially standalone units and units located in established industrial locations such as Crowland Street and Slaidburn Crescent or the, presently full, Formby Industrial Estate. Industrial rents can vary considerably, between £20 and £60/sqm dependant on quality and location.
- 4.93 Against this demand there is an undersupply of modern, moderate or good quality premises of up to 1,000 sqm and particularly units of 500-800 sqm. Given current trends, locations in South Sefton with good Port access would appear to be most desirable although options in North Sefton, catering for local needs and operating at the smaller end of this size range may also be in demand.
- 4.94 At the larger scale there are clearly no large logistics units of up to 50,000 sqm in Sefton which could capture national property requirements. Indeed, based on the current marketed supply meeting demand for any single unit of more than 6,000 sqm is challenging, particularly if the demand is for modern space.

- 4.95 In terms of offices, agents remain somewhat less confident about the demand picture. In Bootle, large suites in the main multi-storey buildings can have quality and specification issues. However, the biggest barrier for lettings is the fact that companies looking for space in the inner Liverpool Conurbation still do not see Bootle Office Quarter as part of their area of search. Lettings of larger office space in Sefton tend to form part of bigger deals for industrial and warehouse facilities.
- 4.96 Local demand is for suites of up to 200 sqm and town centre space, particularly in Southport Town Centre, is most popular. This is preferred over business park accommodation on grounds of affordability and accessibility.
- 4.97 Growing demand for industrial and logistics premises to support Port Growth, or to meet a more generally improving industrial market, is generating complimentary requirements for land. Port related sites are needed within a 25-mile radius of the Port.

Summary

- 4.98 Nationally, prospects for the industrial market are of rising demand against a reducing supply. The later part of 2014 saw a return of speculative development in the 'big box' market for B8 logistics and B2 larger manufacturing and it expected that 2015 will see a resumption in speculative development for smaller industrial units. The freehold market is strengthening but there is little space available to meet needs.
- 4.99 The short and medium market forecast is that, nationally, improving market conditions and online retail growth will see increased demand for prime logistics space. Demand will remain strong for prime logistics space, with the biggest online retailers continuing to fuel the demand. Again, however, a lack of supply is constraining growth at present. As a result occupiers are holding off taking space and in some cases looking to acquire on a Design and Build basis. Those that do seek space are being driven by the lack of options to optimise their supply chains, i.e. bringing more of their operations onto single sites. As a result the average logistics deal, according to market commentators, is for 23,000 sqm of space on at least 10 ha of land, reflecting need for larger yards to hold greater fleets of HGVs.
- 4.100 In terms of the regional office market Manchester and Liverpool will remain the market centres of the North West. However, the severe lack of available stock, in particular Grade A stock, is encouraging organisations to look at assets in strong

secondary locations. In Liverpool City Region this is benefiting Knowsley and South Liverpool but not (yet) Bootle, St Helens and Waterloo.

- 4.101 Estimates suggest that one out of every eight pounds invested in UK commercial property is invested in the North West. This makes it one of the busiest markets outside London and the South East. While the 'prime' centres of Manchester and Liverpool continue to be the foci of regional investment, investors are increasingly willing to look at opportunities in secondary locations which add value to a broader portfolio. In this context, 'added value' means higher yields and positive occupier sentiments for growth.
- 4.102 The Council receives more enquiries for industrial space than for offices; and fewest for sites. Retail accounted for 21 percent of enquiries. There has been little interest for serviced offices in Sefton.
- 4.103 Most industrial enquiries are for units greater than 232 sqm in size. Units of more than 929 sqm appear particularly desirable. In comparison demand for office and retail premises is weighted more heavily towards the 0-93 sqm category, suggesting that demand for these types of premises remains dominated by smaller businesses. Most of those enquiring for land, who gave a site size, want plots of 930 sqm or more.
- 4.104 As of July 2015 there was 83,521 sqm of industrial floorspace on the market, comprising 120 properties. 72 percent of the currently available floorspace (68 percent of the stock of properties) is located in South Sefton. Premises of more than 2,000 sqm, which might provide warehousing and logistics options are primarily found with the A5036 and A59 Corridor areas of Netherton and Aintree. In terms of quality, North Sefton lacks good quality space while budget options are limited across the Borough. 4 percent of the total properties are available freehold and 7 percent of the total properties are available for sale or to let
- 4.105 There are a range of office suites on the market in Sefton, however, most are less than 500 sqm in size. A modest supply of larger offices is available, mostly in the Borough's town centres (Bootle, Crosby, Formby and Southport) but it is not extensive and there are few modern, good quality options. Most space is of average quality and 10 percent of the space is available freehold.

- 4.106 Overall industrial occupancy rates in the Borough are 90.4 percent by floorspace and 92.9 percent by premises numbers. In practice, subject to the natural churn of businesses expansion and relocation, this means that most schemes in the Borough are well occupied.
- 4.107 Occupancy rates for office schemes are lower – 89.9 percent by floorspace and 88.7 percent by premises numbers. However, these figures will be skewed unfavourably by serviced office schemes which are probably rated as single hereditaments in the total figures.
- 4.108 Understanding of the local market was informed by a number of consultees comprising from six national/regional and four local agents. Discussions focused on the level of sales and rental activity, the broad locational distribution of demand and the anticipated future trends and requirements.
- 4.109 The consensus is that, some two years after the end of the recession, demand for industrial and warehouse premises is reasonable. In terms of logistics and larger B2 manufacturing occupiers, agents working across the North West are receiving requirements for units of up to 50,000 sqm, of relevance to Sefton. These are from national businesses who may be considering a range of locations. Agents for MN2.47(b): Atlantic Park have particularly seen demand for properties of that scale.
- 4.110 More locally specific requirements are for production and warehouse space of up to 5,000-10,000 sqm, while the local micro-small business market appears to require industrial units of up to 500 sqm. Agents for Aintree Racecourse Retail and Business Park indicate that premises of around 1,000 sqm are becoming popular amongst trade counter-style businesses. Demand is for a mix of leasehold and freehold options.
- 4.111 Against this demand there is an undersupply of modern, moderate or good quality premises of up to 1,000 sqm and particularly units of 500-800 sqm. At the larger scale, based on the current marketed supply, meeting demand for any single unit of more than 6,000 sqm is challenging, particularly if the demand is for modern space.
- 4.112 In terms of offices, agents remain somewhat less confident about the demand picture. In Bootle, large suites in the main multi-storey buildings can have quality and specification issues. However, the biggest barrier for lettings is the fact that

companies looking for space in the inner Liverpool Conurbation still do not see Bootle Office Quarter as part of their area of search. Local demand is for suites of up to 200 sqm and town centre space, particularly in Southport Town Centre, is most popular.

5.0 STAKEHOLDERS

Introduction

- 5.1 This section provides commentary about Sefton, drawn from consultations with the public sector and other stakeholders. It should be noted that each organisation's comments are their perception of the situation, and may well reflect their role and involvement, rather than being the complete picture.
- 5.2 Consultation work here builds upon a comprehensive survey of 770 businesses completed in late 2014 as part of an 'Employment Potential' study regarding the expansion of the Port of Liverpool. Relevant results from that survey are summarised here.
- 5.3 Further consultations have taken place with 13 businesses located in Sefton, including businesses who indicated they had aspirations to grow in the previous Employment Potential Study. Details of these consultations can be found in Appendix 3.
- 5.4 This section also considers the property market in the three local authority areas, including West Lancashire in Lancashire, which neighbour Sefton. Understanding the supply and demand of employment land and premises in neighbouring areas is important in assessing their impact on the study area's land and property market.
- 5.5 It should be noted that where stakeholders made more general market comments, these are related in Section 4.0, above. Comments relating to specific Employment Sites or Employment Areas are incorporated in the wider Employment Land Analysis in Section 6.0.

Liverpool City Region Local Enterprise Partnership

- 5.6 The Liverpool LEP was consulted primarily in relation to the expanding Port of Liverpool and the associated Superport Liverpool Programme.
- 5.7 The LEP confirmed that the Liverpool City Region Superport: Market Analysis Land and Property Study (2014) remains the most up to date evidence of the additional land needs emerging from port growth (i.e. some 400-500 ha above the 2014 sub-regional supply). However, this study does not clarify how that need could be divided between the local authorities of the Liverpool City Region and beyond. It is accepted that further sub-regional research may be required to understand how the need could

be realistically split between the different local authority areas. Research would also need to clarify the likely time period in which further land needs to be brought forward.

- 5.8 The need is for unconstrained sites, which can support premises of 10,000 sqm or more. Needs are likely to be split between B2 and B8 uses and accordingly there is the need for flexibility between these two uses in site allocations. When specific requirements emerge they are likely to be relatively urgent and it is felt that if a plot cannot be brought forward in less than 18 months it will not meet needs.
- 5.9 Peel Ports have been reviewing the current Port Estate with a view towards intensifying uses on land currently in port operation. The expansion of the port onto some adjacent land is likely, but it is felt that the actual land take up resulting from this will be limited. Certainly, acquiring the densely occupied L5 area (Regent Road/Derby Road) would appear, in the view of the LEP at least, to be a costly and difficult exercise for very little land gain. Returning land north of the current Royal Seaford Docks, which is now the Seaforth Nature Reserve, to active port use is likely to remain a desirable goal for the port operators. Amongst other options this land could be used to deliver a more direct rail link to the new Liverpool 2 port terminal which is expected to open by the end of 2015. However, there are significant ecological constraints to be overcome before any development could take place on the Nature Reserve.
- 5.10 The new port terminal is expected to double port throughput over the next 10-20 years. To account for this growth the LEP, supporting the Port Access Steering Group, is prioritising infrastructure investment in a range of transport modes. This includes supporting road improvements along the A5036 Dunnings Bridge Road and at Switch Island. On the railways, port growth is expected to increase rail activity to 38 trains a day, and lines through Bootle may need upgrades to support this. Traffic along the Manchester Ship Canal is expected to reach 30,000 containers a day.
- 5.11 In terms of Sefton, it is felt that the current emphasis on infrastructure development over land provision means that the Borough is in danger of becoming a location through which freight is moved rather than a location where it is processed. The difficulties in providing further land within the primarily urban area of South Sefton are accepted however.

Port of Liverpool Employment Potential Study (2015) – Business Survey Report Summary

- 5.12 In October and November 2014, BE Group undertook a business survey on behalf of Sefton Council. The survey forms one element of an 'Employment Potential' study regarding the expansion of the Port of Liverpool.
- 5.13 Overall, 770 questionnaires were completed from a target of 800 – a 19.7 percent sample of Sefton's business population. The responses were split between Port Tenants, port related businesses across the Borough, also by non-port related businesses in North Sefton (Southport only in this case), Central Sefton (Formby, Crosby and Maghull) and South Sefton. The results were:
- Port of Liverpool Tenants – 21 businesses (2.7 percent of total responses)
 - Port Related businesses operating within Sefton, but outside of the Port Estate – 42 businesses (5.5 percent)
 - General North Sefton Businesses – 201 Businesses (26.1 percent)
 - General Central Sefton Businesses – 110 Businesses (14.3 percent)
 - General South Sefton Businesses – 396 Businesses (51.4 percent).
- 5.14 This split enabled a sectoral analysis on the different areas of the Borough.

Port/Port Related Businesses

- 5.15 63 port businesses were surveyed (21 Port Tenants and 42 'port-related'), many of whom are established long term occupiers. They employ 1,523 people, 684 within the Port Estate.
- 5.16 The survey was conducted in autumn 2014 when the UK was recovering from recession, and the surveyed businesses presented a largely positive view of their future prospects. Two thirds expect to see some growth over the next two years, but few expect this to exceed 10 percent. Surprisingly, given the approaching expansion of the Port, less expect a longer term increase in their business. However, this may reflect ongoing long term pessimism following a period of recession.
- 5.17 Unsurprisingly, the majority of space occupied by these businesses is warehouse type space (mostly of 1,000 sqm or less), and most office space is ancillary to the principal business. However, there is a limited office market housing financial and business support services, along with most of the scientific and technical businesses

surveyed. There are however, large logistics businesses, in and around the Port with and 12 Port Tenant occupy space of more than 1,000 sqm.

- 5.18 92.9 percent of port related businesses and 90.5 percent of the Port Tenants believe they will be operating from the same location in five years. The remaining businesses thought they would be in the same location but in larger premises, an indication that businesses expect to grow. None of the businesses surveyed identified requirements for further land or premises.
- 5.19 Unsurprisingly, most businesses stated that proximity to the port and access to port-related markets was the key factor in their decision to locate in Sefton. 97 percent recorded that they were either 'very satisfied' or 'satisfied' with their current premises. One unsatisfied port-based shipping business quoted a dissatisfaction with the age and build quality of its 201-500 sqm leasehold unit, alongside a lack of sufficient internal heating.
- 5.20 Respondents were also asked what barriers to growth exist in Sefton over the medium (3-5 years) and long term (5-10 years). Over both the medium and long term, the main barriers to growth were significantly identified as high business rates; access to finance; and access to expertise/knowledge. 'Other' barriers related to concerns over the national/international economy, fears over both another recession and the state of the Eurozone economy.
- 5.21 In regards to future planning, Port Tenants prioritised support with business growth and sales/marketing (albeit the response level was low). Several issues were not ranked at all by these respondents including crime and security and, surprisingly given the sample, exporting. Amongst the port-related businesses, sales/marketing and support for business growth were most consistently ranked first or second. Support on finance/grants/investment was also viewed as important. Development of local business networks was a matter which interested respondents, but they only ranked it third to fifth in importance. Notable within these figures is the fact that over half of Port Tenants and just over a quarter of port-related businesses trade exclusively within Merseyside.

General – North/Central/South Sefton

- 5.22 A further 707 businesses were surveyed in order to provide the study with a Borough wide view of business demands. These businesses employ 6,867 people and their connection to the port is limited. Businesses in Sefton are generally well-established with a high proportion having traded for over 4 years, and almost 40 percent being over 14 years old.
- 5.23 There is an established difference between the socio-economic nature of South, Central and North Sefton. The South is urban and very much part of the Liverpool Conurbation, influenced by the environment around the docks, while the Central and Northern areas include the more distinct communities of Maghull, Formby and Southport. Across all areas, businesses are overwhelmingly small or micro with almost 98 percent employing less than 50 people. There are large employers across the area, with most located away from the more residential Central Zone.
- 5.24 The prospects for growth across Sefton are reasonable, particularly over the long term. Two thirds expect to grow by up to 10 percent over the next two years, rising to three quarters if a longer term view is taken. Improvements in the national economic climate, port expansion and improved (company specific) marketing strategies are seen as the principal drivers of future growth.
- 5.25 In the short term, just over two thirds of respondents expect employment levels to stay the same. The long term outlook is much more positive however, and 62 percent of businesses expect some employment growth over the next decade, mostly in the 0-10 percent range. Employers, whilst mostly not actively looking for staff, did highlight some skills shortages. These were almost all related to trades (skilled joiners, plumbers, etc.), and this appears to be a particular problem for industrial businesses in the South.
- 5.26 The North, with much of its business stock in Southport, has a high concentration of office occupiers with local market catchments, who trade almost exclusively within Sefton and Merseyside. This reflects the nature of the area which includes an established town centre and a business park. By comparison just 24 North Sefton businesses declared that they are in warehouse or industrial space. Industrial responses were concentrated in the South and Central area. Whilst Bootle Town Centre does have a large public sector office market, this is not strongly reflected in the responses.

- 5.27 Most respondents occupied premises of 200-1,000 sqm, but 82 businesses (11.6 percent) occupy units of 1,000-5,000 sqm. 93 percent of these larger occupiers are based in South Sefton. However all but two of the 28 properties described as being more than 5,000 sqm in size are in North Sefton.
- 5.28 Few businesses appear to have a problem with their premises with only 10 of the 707 expressing dissatisfaction. This general satisfaction is reflected in the fact that 91.7 percent of businesses expect to be in the same location in five years time and only 14 businesses indicated an immediate need for additional or new premises (see Table 33). North and Central Sefton requirements were primarily office led, whilst in the South the predominance is for industrial uses. As can be seen from Table 33, not all businesses gave a size but those that did most wanted units in excess of 100 sqm. The strongest demand comes from firms in the professional, scientific and technical sectors.

Table 33 – Property Requirements

Area	Details		
	Company Sector	Property Type	Size Required
North Sefton	Construction	Office	100 sqm+
Central Sefton	Construction	HQ Office	Not Stated
	Manufacturing	Industrial	100 sqm+
	Professional, scientific and technical	Offices	100 sqm+
	Professional, scientific and technical	Offices	Not Stated
	Professional, scientific and technical	Offices	100 sqm+
	Professional, scientific and technical	Industrial	100 sqm+
South Sefton	Business administration and support	High Quality Offices	Not Stated
	Manufacturing	Industrial	Not Stated
	Transportation and Storage	Industrial unit with additional office space (garage)	Not Stated
	Professional, scientific and technical	Industrial	200 sqm+
	Business administration and support	High Quality Offices	100 sqm+

Area	Details		
	Company Sector	Property Type	Size Required
	Manufacturing	Industrial	Not Stated
	Professional, scientific and technical	Offices	Not Stated

Source: **BE Group** 2015

Neighbouring Areas

- 5.29 Para 160 of the NPPF states that local planning authorities should have a clear understanding of business needs within their local economic markets, by working with county and neighbouring authorities to prepare and maintain a robust evidence base about business needs and likely market changes.
- 5.30 Sefton is the most northerly local authority area of the Liverpool City Region. To the south are the City of Liverpool and the Metropolitan Borough of Knowsley. To the east is West Lancashire. To the south west is Wirral. However, Sefton and Wirral are divided by the Mersey Estuary and do not share a land boundary. Therefore any connections are limited and no analysis of Wirral is deemed necessary.

Liverpool

- 5.31 The Liverpool Employment Land Review (2009) estimated a demand for 200-317 ha of employment land, across the City, to 2026. As of 2009, Liverpool had a supply of 266 ha in 256 sites, close to the mid point of the range of demand identified. The study notes that Liverpool's supply of B1 and B2 land is sufficient to meet needs, but there is a shortage of larger plots suitable for B8 warehousing and distribution uses.
- 5.32 This was updated in the Liverpool City Region Housing and Economic Development Evidence Base Overview Study, 2011. The study indicated a land supply, at December 2010, of 274.89 ha. Liverpool needs 254.58 ha of land to 2031, giving a modest oversupply of 20.31 ha. In the Liverpool City Region, only Liverpool and St Helens were judged to have more land than they will need for the next 20 years.
- 5.33 The recommendations of these two studies were subsequently reflected in the Liverpool Core Strategy (Submission Draft, 2012). 'Strategic Policy 2: Land for Employment' states that *"the City Council will allocate between 200 and 320 ha of land for industrial and business use over the plan period"*, to 2028. As is indicated above, some 274 ha of employment land has already been identified leaving a maximum of 46 ha still to be found.

- 5.34 New employment development will be directed towards the City's five Strategic Investment Areas (SIAs):
- Approach A580 (The East Lancashire Road Corridor)
 - Atlantic Gateway (North Liverpool)
 - City Centre
 - Eastern Approaches (the Edge Lane Corridor)
 - Speke/Halewood (International Gateway).
- 5.35 The 2009 Employment Land Review indicates that the City Centre SIA is likely to accommodate a significant proportion of the identified B1(a) office demand (between 12 and 29 ha), particularly for medium to large floorplates accommodating sectors such as the banking. For businesses seeking out of centre options, the Eastern Approaches SIA is likely to be a preferred location, particularly for ICT uses needing proximity to the City's universities.
- 5.36 The Approach A580 and Atlantic Gateway SIAs are likely to accommodate the majority of forecast demand for B2 land/premises in Liverpool over the plan period (i.e. between 50 and 109 ha). Around 93 ha was available here, 32 ha in the Atlantic Gateway. In the Atlantic Gateway an identified concern was the loss of B2 land to City Centre uses.
- 5.37 Projected demand for B8 premises in 2009, and not therefore inclusive of the most recent projections of port-related needs, was for between 121 and 196 ha. The Study felt that take up would be focused in the Approach A580 SIA, where only 7 ha was available for this use, at that time. A large 22 ha site is also available at Stonebridge Court, under HCA ownership.
- 5.38 The only other SIA which is likely to accommodate such requirements is the Speke Halewood SIA. However, market consultation and supply analysis suggested that this was not a desirable location for this use, unless occupiers had specific air freight requirements which need proximity to Liverpool John Lennon Airport. Thus Liverpool was judged to have a shortfall in B8 land although this was measured against the likelihood that warehousing demand would be focused on strategic transport routes which extend across the Liverpool City Region.
- 5.39 Liverpool is the main destination of workers commuting from Sefton. In 2011, 24,208 Sefton residents commuted into Liverpool city (just over half of out commuters).

11,524 commuted into Sefton from Liverpool (40.5 percent of incomers).

Atlantic Gateway SIA

5.40 Within the Atlantic Gateway, the Liverpool Waters development area is now an Enterprise Zone. 60 ha of land is proposed for some 1.7 million sqm of mixed-use floorspace, including up to 314,500 sqm of offices. 2,500 people are already employed in the Princes Dock area for companies including KPMG, Royal Bank of Scotland and Coutts Bank. As of October 2014, six plots were available for immediate development for B1(a) offices, capable of providing some 57,000 sqm of additional floorspace. A second office based Enterprise Zone has been established within the adjacent City Centre.

5.41 Most of the rest of north west Liverpool, which bounds Sefton, is now included in the North Liverpool Mayoral Development Zone (MDZ), one of five such zones recently established in the City. This includes the portion of the docklands within Liverpool. Here recent highlighted economic successes include the expansion of the New Britain Oils facility, Regent Road, which has received £30 million in investment since 2010. United Utilities is also investing £193 million in water treatment facilities at Wellington Dock. The North Liverpool MDZ is also identified as a location for renewable energy technologies, along with more traditional sectors such as motor trade and repair as well as ICT. Some 8.62 ha of employment land is identified as available here, mostly around Derby Road and at Kingsway Industrial Park. However, most of the sites are less than 2 ha in size, with the largest (former Ogdens Factory, West Derby Road) extending to 3.45 ha.

Port Growth

5.42 Liverpool City Council is aware of Peel Ports' long term plans for the expansion of the Port of Liverpool. Within the Liverpool local authority area, proposals include the redevelopment of the 8 ha Huskisson Dock Complex and some 12 ha of the Regent Road/Derby Road (L5) Area which is within Liverpool. City Council officers also note that Peel is working to protect docklands sites around Liverpool Waters for dock and related B2/B8 uses.

Knowsley

5.43 In June 2015, reconvened hearings were held for the Examination in Public into the Knowsley Local Plan Core Strategy. In a written response, the Planning Inspector recently found the Core Strategy sound.

- 5.44 Policy CS4 of the Knowsley Core Strategy sets out a land requirement of 153 ha over 2010-2028. This is based on a forward projection of long term historic take up at 9.11 ha/year, less 2010-2013 take up (11 ha). This does not account for any additional land requirements to support Port growth or the resulting projected increase in logistics needs. Rather in the Examination in Public, Knowsley Council successfully argued that it would not be appropriate to delay the adoption of the Core Strategy to allow for the identification and inclusion of additional land allocations for this. Instead the Council intends to consider this issue in the next Local Plan review, likely to commence rapidly after Core Strategy adoption. It will also participate in a future sub-regional review of Port related land needs. Knowsley Council hold the view that this is an appropriate approach as major land requirements, resulting from Port growth, are unlikely to come forward in less than five years.
- 5.45 To meet the Knowsley's existing needs the Core Strategy therefore sets out a total land supply of 238.71 ha. However, that supply is then reduced by 35 percent (81.44 ha) to allow for some failures in delivery and ensure some flexibility in supply post 2028. A supply of 157.27 ha is therefore considered available to meet the projected need of 153 ha.
- 5.46 To meet both employment and housing needs, Core Strategy Policy SUE1 identifies nine strategic level allocations within the Green Belt, which are referred to as Sustainable Urban Extensions:
- Bank Lane, Kirkby (residential)
 - East of Knowsley Industrial and Business Parks, Kirkby (7.2 ha of B-Class employment land)
 - Knowsley Lane, Huyton (residential and 16 ha of land for B1 uses. This will provide a successor to Kings Business Park)
 - Edenhurst Avenue, Huyton (residential)
 - Land bounded by A58, Prescott (residential)
 - Carr Lane, Prescott (residential)
 - East of Halewood (residential – 1,100 dwellings)
 - South of Whiston (residential – 1,500 dwellings)
 - Land South of M62 (22.5 ha of land for B8 uses and country park).
- 5.47 Of particular relevance to Sefton and the wider Liverpool City Region is likely to be the Land South of M62 (former Cronton Colliery). This is proposed for large scale

logistics and distribution uses and therefore would provide some competition to sites in Sefton, presently limited to MN2.47(b): Atlantic Park, which may also seek to develop larger warehousing options in support of growing Port-related needs.

- 5.48 Restructuring/remodelling options at Knowsley Industrial Park/Business Park, were reviewed in the Strategic Framework 'Delivering a New Future for Knowsley Industrial Park' (2010). This study identified opportunity areas totalling 25 ha, which have the potential to provide over 98,000 sqm of additional employment floorspace by 2027. However, the Core Strategy assumes that only a portion of these opportunities, some 18 ha, will ultimately come forward.
- 5.49 Knowsley is a net importer of workers from Sefton. In 2011, only 2,996 Knowsley residents commuted into Sefton (10.9 percent of Sefton's in-commuters) while 3,886 commuted from Sefton into Knowsley (8.2 percent of Sefton's working age population).
- 5.50 Key influences on Sefton's land and property market will be focused in Knowsley Industrial and Business Parks, although all of Knowsley's Employment Areas are focused around the M57 and are readily accessible from South Sefton. Knowsley Industrial and Business Parks are dominated by large employers who will draw some labour from Sefton. These include QVC, Vertex, Delphi, St Ivel and Makro.
- 5.51 Further south, Kings Business Park, Prescott provides high quality self-contained offices for a mix of local and regional/national occupiers including Vertex. As noted above a 16 ha expansion site for the Business Park is identified in in the emerging Core Strategy To the east, the 29 ha Pirelli South site has planning permission for a housing-led mixed-use scheme. However, the applicant Prescott Business Parks Ltd has recently submitted a revised outline application, if approved, this would reduce the B1/B2/B8 provision from around 5 ha to 929 sqm.

West Lancashire

- 5.52 West Lancashire was included within the Liverpool City Region Joint Employment Land and Premises Study, completed by BE Group in 2010. That study indicated that the Borough had 69.90 ha of employment land made up of 20 sites. However, 10.44 ha of this comprised land in operational use by companies, or held for future expansion. The realistic supply was therefore considered to be 59.46 ha, comprising 15 sites. Most of this land is in Skelmersdale. There is only a modest supply in the

smaller western settlements which border Sefton, such as Banks. An additional 93.04 ha is required to 2026, based on past take-up rates of 7.06 ha/year between 1992/93 and 2007/08, and including a 20 percent buffer.

- 5.53 This was updated in the Liverpool City Region Housing and Economic Development Evidence Base Overview Study, 2011. The study indicated a land supply, at December 2010, of 49.66 ha. West Lancashire needs 135.03 ha of land to 2031, giving a shortfall of 85.37 ha.
- 5.54 The West Lancashire Local Plan, 2013 indicates that 75 ha of employment land will be required between 2012 and 2027. 52 ha of this will be provided in Skelmersdale through the development of existing allocations (notably at White Moss and XL Business Park) and the regeneration of vacant and under-used premises on Pimbo, Gillibrands and Stanley Industrial Estates. The remaining 23 ha will be provided through:
- Existing allocations and remodelling of the Burscough industrial estates (3 ha)
 - Extension of the Burscough industrial estates into the Green Belt (10 ha)
 - Existing allocations and remodelling of Simonswood Industrial Estate (5 ha)
 - Existing allocations and new opportunities for rural employment sites in rural areas (5 ha).
- 5.55 In terms of commuting, Sefton is a modest net importer of labour from West Lancashire. In 2011, only 5,220 West Lancashire residents commuted into Sefton (11.0 percent of Sefton's in-commuters) while 5,476 commuted from Sefton into West Lancashire (19.2 percent of Sefton's working age population).
- 5.56 The strongest linkages between West Lancashire and Sefton are likely to be around Skelmersdale, particularly Gillibrands Industrial Estate, Pimbo Industrial Estate and Stanley Industrial Estate. These three very large industrial estates are all located within the M58 corridor and are easily accessible from both the Liverpool City Region and the M6 Corridor. There is an established body of national and international B2 and B8 businesses that operate regional scale operations from this area including Procter and Gamble, Walkers Crisps and Matalan.
- 5.57 Also located off the M58 at Skelmersdale are White Moss Business Park and XL Business Park (which includes logistics facilities for Asda and Comet). Together

these two employment areas include some 27 ha of undeveloped expansion land. Skelmersdale is therefore identified as a location which can compete with Sefton for investment from larger B2 and B8 businesses. It is also geographically well placed to meet an element of land needs from the Liverpool Superport, although West Lancashire District Council concedes that at present, West Lancashire still lacks a sufficient supply of large allocated sites adjacent to, or in close proximity to the M58 corridor to take advantage of the longer-term logistics and warehousing opportunities emerging.

- 5.58 In the rural areas of West Lancashire, Simonswood Industrial Park is notable because it supports the Port of Liverpool by providing storage land for shipping containers. It also houses several associated logistics companies.
- 5.59 Based outside of Ormskirk, Edge Hill University accommodated 10,672 full time and 6,078 part time students in 2014, on a 65 ha campus. In terms of staff, 3,275 are employed at present and the University is likely to draw a reasonable portion of its staff from Sefton. Edge Hill University is half way through a 20 year programme of growth, recent developments include the £17million Creative Edge building, which opened in September 2013 and include facilities for students studying courses in Media, Film, Animation, Advertising and Computing. Delivery of a £30 million sports complex is also expected in 2015 along with the next phase of the residential building programme which will see 144 new bedrooms constructed within the central campus.

Summary

- 5.60 Four major public sector organisations including all the local authorities which neighbour Sefton and 13 key businesses have been consulted on a one to one basis as part of the study.
- 5.61 It should be noted that where stakeholders (agents and developers) made more general market comments, there are related in Section 4.0, above. Detailed discussions have also been completed with landowners, and their agents, for the key employment sites and these are included in the broader land supply analysis in Section 6.0, Employment Land Supply.
- 5.62 Consultations with a sample of the larger businesses in the Borough suggest a reasonable desire for further growth within Sefton (see Appendix 3). Five of the 13 businesses have growth aspirations. For the most part these businesses do not

envisage there will be any problems in finding the land or premises they need locally. The main exception is within the Port Estate, where space is increasingly constrained given broader growth in Port operations. In the longer term this may have implications for the operations of some Port tenants. In the short term, skills gaps are a more immediate concern.

- 5.63 This reflects the findings of the Port of Liverpool Employment Potential Study (2015) – Business Survey Report, which indicated very high levels of satisfaction in the Borough and its current premises offer. Out of 707 general businesses consulted for this study only 14 businesses indicated an immediate need for additional or new premises. North (and Central) Sefton requirements were primarily office led, whilst in the South the predominance is for industrial uses. Requirements were generally for units 100 sqm or more.
- 5.64 Businesses are also relatively confident about short term prospects for growth. In terms of turnover at least, the majority predict improvements of around 10 percent over the next few years.
- 5.65 The LEP confirmed that the Liverpool City Region Superport: Market Analysis Land and Property Study (2014) remains the most up to date evidence of the additional land needs emerging from port. However, this study does not clarify how that need could be divided between the local authorities of the Liverpool City Region and beyond. It is accepted that further sub-regional research may be required to understand how the need could be realistically split between the different local authority areas.
- 5.66 The need is for unconstrained sites, which can support premises of 10,000 sqm or more. Needs are likely to be split between B2 and B8 uses and accordingly there is the need for flexibility between these two uses in site allocations. When specific requirements emerge they are likely to be relatively urgent and it is felt that if a plot cannot be brought forward in less than 18 months it will not meet needs.
- 5.67 All of the local authorities around Sefton feel they are able to meet their employment land needs on land within their own local authority area boundaries. South Sefton (Bootle) is only 3 kms from the edge of Liverpool City Centre and around half of Sefton's out commuters commute into the City to work. Sefton residents will work throughout the City, but the northern SIAs (Approach A580, Atlantic Gateway and the City Centre) have the strongest influence. Within the Atlantic Gateway SIA, the

Liverpool Waters development area is now an Enterprise Zone. 60 ha of land is proposed for some 1.7 million sqm of mixed-use floorspace, including up to 314,500 sqm of offices. 2,500 people are already employed in the Princes Dock area.

- 5.68 Liverpool City Council is aware of Peel Ports' long term plans for the expansion of the Port of Liverpool. Within the Liverpool local authority area, proposals include the redevelopment of the 8 ha Huskisson Dock Complex and the majority of the Regent Road/Derby Road (L5) Area which is within Liverpool. City Council officers also note that Peel is working to protect docklands sites around Liverpool Waters for dock and related B2/B8 uses
- 5.69 In Knowsley, Policy CS4 of the Core Strategy sets out a land requirement of 153 ha over 2010-2028. This does not account for any additional land requirements to support Port growth or the resulting projected increase in logistics needs. Rather in the Examination in Public, Knowsley Council successfully argued that it would not be appropriate to delay the adoption of the Core Strategy to allow for the identification and inclusion of additional land allocations for this. Instead the Council intends to consider this issue in the next Local Plan review, likely to commence rapidly after Core Strategy adoption.
- 5.70 To meet its more immediate needs the Knowsley Core Strategy is proposing nine Sustainable Urban Extensions across the Borough. Of particular relevance to Sefton and the wider Liverpool City Region is likely to be the Land South of M62 (former Cronton Colliery). This is proposed for large scale logistics and distribution uses and therefore would provide some competition to sites in Sefton, presently limited to MN2.47(b): Atlantic Park, which may also seek to develop larger warehousing options in support of growing Port-related needs.
- 5.71 The West Lancashire Local Plan indicates that 75 ha of employment land will be required between 2012 and 2027. 52 ha of this will be provided in Skelmersdale through the development of existing allocations. This includes some 27 ha of undeveloped expansion land at White Moss Business Park and XL Business Park Skelmersdale is therefore identified as a location which can compete with Sefton for investment from larger B2 and B8 businesses. It is also geographically well placed to meet an element of land needs from the Port growth although West Lancashire District Council concedes that at present, West Lancashire still lacks a sufficient supply of large allocated sites adjacent to, or in close proximity to the M58 corridor to

take advantage of the longer-term logistics and warehousing opportunities emerging.

6.0 EMPLOYMENT LAND SUPPLY

Introduction

- 6.1 This section looks at the existing portfolio of potential employment land in the study area, not only how much there is, but also its quality, type, suitability and availability. Sefton needs a balanced portfolio of land to accommodate a sustainable, growing economy that can respond to dynamic market conditions, changing business needs and working practices. By initially establishing how much land there is, the second task is to consider how much land is needed in the future (to 2035), which is picked up in the forecasting section later in the report.

Land Supply

- 6.2 Sefton's identified employment land supply (at 31st March 2015) is contained within the 11 sites (MN2.46-MN2.54) proposed under Policy MN2: Housing, Employment, and Mixed Use Allocations of the emerging 'A Local Plan for Sefton: Publication Draft.' This includes some sites allocated in the previous Sefton UDP.
- 6.3 Table 34 schedules Sefton's current employment land supply. It outlines their size; provides comments on current status (e.g. owner intentions), market attractiveness, together with an assessment as to when they might come forward for development or use. This assessment of timescale is based upon a number of factors – market demand, overview (from discussions with stakeholders and site owners), ownership situation, planning status, infrastructure and services required. Proformas for each site are provided at Appendix 4.

Table 34 – Employment Sites Schedule

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
North Sefton					
MN2.50 (formally SL112_10): Southport Business Park	13.10	<p>The remaining undeveloped land is now divided into two sections.</p> <p>The wider area has consent for 669 dwellings, a respite and dementia care facility and retail uses on land to the south and south east of the Business Park (App. No. S/2012/0400). The consent also provides outline permission for a B1/B2/B8 (and Sui Generis motor retail) business park on 4.7 ha of land in the north east of MN2.50: Southport Business Park. The residential elements are currently being developed by David Wilson Homes, along with work to mitigate the site constraints. When this is complete land will be made available to the commercial arm of Wilson Bowden to implement the business park. There is no timetable for completion of this latter element. Commercial development here will be supported by funds derived from the adjacent residential developments.</p> <p>Land in the south and west of the site is directly controlled by the Council. The Council is currently preparing to tender for a development partner for this land who can deliver an extension to the existing business park. It is hoped that a partner can be secured within 18 months to commence further development activities.</p>	<p>The Council report receiving a range of informal enquiries for land and premises here, primarily from B1 businesses. This has prompted Sefton Council to seek a development partner at this time.</p> <p>Given the existing mix of uses on the site it is assumed that future development will also be for a range of B1/B2/B8 uses, providing premises both for established firms looking to grow and inward investors.</p> <p>While development may include some speculative development it is assumed that most plots will be delivered on a design and build basis to meet specific requirements. The site constraints will likely have an impact on development values and the Council do not anticipate a significant capital return on the land made available.</p> <p>The location is some distance from the motorway network and so would struggle to attract larger logistics operations. The site is also not well located in relation to the Port</p>	<p>Administrative and support service activities Professional, scientific and technical activities Storage and distribution Manufacturing</p>	3-5
MN2.48 and MN4: Land to the North of Formby Industrial Estate	8.00	<p>An indicative site masterplan has been prepared which proposes the following mix of uses:</p> <ul style="list-style-type: none"> • 20,903 sqm of B2/B8 premises in seven units of 1,858-5,574 sqm • 3,252 sqm of B1(c) starter units • 5,295 sqm of B1(a) offices/starter offices • 3,623 sqm of trade space • 5,760 sqm of hybrid space. <p>38,833 sqm total.</p> <p>This mix of uses remains indicative and could be subject to change in subsequent planning applications, however, the site has been marketed to developers on this basis.</p>	<p>This land has not yet been marketed and does not appear to have attracted any informal requirements businesses. However, the site has been marketed to some eight developers, of which four have shown good interest in the developing the site for the range of uses shown in the indicative masterplan. At this time they are not indicating that an element of higher value uses (beyond the trade space already proposed) will be required to secure development viability.</p> <p>Agents for the site expect to be able to secure indicative heads of terms with a preferred</p>	<p>Administrative and support service activities Construction Professional, scientific and technical activities Storage and distribution Manufacturing</p>	5+

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
		<p>As is noted below, it is expected that a developer can be secured for the site by the end of the year in which the Sefton Local Plan is adopted, with a planning consent sought immediately thereafter. Depending on demand levels, construction could commence in 2018-2020.</p> <p>Using standard HCA densities it is possible to make the following estimates for the likely jobs which could be generated if the uses set out in the masterplan are brought forward:</p> <ul style="list-style-type: none"> • Larger B2/B8 uses: <ul style="list-style-type: none"> ○ If 100 percent B2 uses at 1 job per 36 sqm = 581 jobs ○ If 100 percent B8 uses at 1 job per 70 sqm (general warehousing) = 299 jobs ○ If 50 percent B2/50 percent B8 = 439 jobs. • B1(c) starter units at 1 job per 47 sqm = 69 jobs • B1(a) offices/starter offices at 1 job per 10 sqm (an average business park density, actual densities will vary) = 530 jobs • Trade space 1 job per 70 sqm (similar to warehousing, real densities will vary depending on the retail element within the space) = 52 jobs • Hybrid space at 1 job per 47 sqm (assumes space will be primarily used for light industry) = 123 jobs <p>Thus the maximum likely jobs generation, assuming larger space is primarily used for B2 general industry, is 1,355 jobs. A lower estimate, assuming the larger space is primarily used for B8 warehousing, is 1,073 jobs. The mid-range, with a mix of B2/B8 accommodation delivered, would be 1,213 jobs.</p> <p>The Local Plan and Community Infrastructure Levy Economic Viability Study (2014) suggests that viability may be an issue on this site.. Financial Appraisals for the Viability Study suggest a deficit of £2.7 million (8 percent of Gross Development Value). However this assumes the site is developed entirely speculatively and then sold on to an investor. In practice a developer would likely take a more flexible approach to achieve profitability, possibly developing the smaller business space speculatively and offering the larger units as design and build options. If this was the case then the timeframe for site completion would be longer as design and build plots may take some years to come forward.</p>	<p>developer by September 2015, moving towards a legal agreement by the end of the year.</p> <p>This location may not be attractive to operators who specifically support the Port of Liverpool, particularly given the alternative sites available in South Sefton. However, delivery of the Brooms Cross Road (A5758) will greatly improve the accessibility of this site to the Port and M57/M58 motorways.</p>		

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
MN2.49 and MN5: Land South of Formby Industrial Estate	7.00	<p>St Modwen has now been secured to develop this site. The next step will be further research into site conditions, specifically:</p> <ul style="list-style-type: none"> • Design of highways access • Additional work on flood risk • Ground conditions, ecological and archaeological assessments • Cost studies and viability appraisals <p>All of the above will inform the production of a masterplan supported by a delivery plan which will be used to support case to be offered to examination and to support the Council's position on the site.</p> <p>Development, reflecting current market is expected to be for B1(c) and B8 trade uses. Units of 50-500 sqm would be delivered speculatively and could include freehold options. Larger Design and Build plots are also proposed which could provide properties of 1,000 sqm or more to established firms.</p> <p>Replacement facilities for Formby Football Club will also need to be provided. A new Sports Centre is proposed at an estimated cost of £2-3 million (subject to further understanding of the design and potential of the facility), with expected delivery in 2016/17. Facilities will include AstroTurf pitches which can be provided on land rendered otherwise undevelopable due to flood risk.</p> <p>An element of non B-Class enabling development will be required to support the high access and development costs, particularly of the Sport Centre. The applicant presently assumes these will include a mix of retail and hot food options. How these uses could compliment or compete with Formby Town Centre would need to be clarified.</p> <p>Subject to addressing the constraints, a relatively fast delivery timetable is proposed with the main elements delivered within three years and full completion likely by 2020.</p> <p>The most recent research, likely to be amended once the site masterplan is completed, suggests that some 12,300 sqm of B1/B2/B8 space could be provided here. However, this appears quite a low density of development, given that the capacity of the site, at a standard developer ratio of 3,900 sqm/hectare could be 27,300 sqm. This larger space estimate, which is closer to that proposed on Land North of Formby Industrial Estate, is used to consider jobs provision on the site</p> <p>No split between the uses has been provided so an assumption (indicative only) is made that a quarter of this space is developed for</p>	<p>Formal marketing has not commenced here. However, site owners and agents report receiving a healthy number of informal enquiries for land and premises from local firms. Demand appears to be for B1(c) light industrial uses and B8 trade uses. This reflects the fact that the existing Formby Industrial Estate, which is dominated by B1(c) and B8 premises, is fully occupied with few good quality alternatives in North Sefton. Little interest in B1(a) offices has been received and accordingly the developers do not expect to proceed with any office development here.</p> <p>The offer proposed for MN2.49 and MN5: Land to the South of Formby Industrial Estate is similar to that in Land to the North of Formby Industrial Estate. Both are proposing strong elements of B1(c) light industry and B8 trade units. In particular, both are proposing plots for larger B2/B8 units of 1,000 sqm or more. If, as appears likely, larger plots at both locations are offered on a Design and Build basis to established firms then it is likely that both sites will be competing to attract potential occupiers from the limited pool of companies who would want a new build unit in North Sefton.</p> <p>Despite this, initial demand evidence, in the form of informal enquiries in the south and developer interest in the north, does suggest that sufficient market requirements exist to support both sites. Delivery of space on MN2.49 and MN5: Land to the South of Formby Industrial Estate is also expected to occur in a shorter timeframe than land in the north, and such a staggered approach to new development around Formby should minimise the risk that the two sites deliver similar property elements at the same time. Rather the two locations will likely provide an ongoing offer of space throughout the plan period in North Sefton.</p> <p>It is also noted that offices (and hybrid units) are only proposed on Land to the North of Formby Industrial Estate.</p>	<p>Construction Storage and distribution Manufacturing</p>	3-5

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
		<p>B1(c) uses (6,825 sqm), a quarter for B8 trade and half for larger B2/B8 options (13,650 sqm).</p> <p>Using standard HCA densities it is possible to make the following estimates for the likely jobs which could be generated if the proposed uses are brought forward:</p> <ul style="list-style-type: none"> • B1(c) light industrial units at 1 job per 47 sqm = 145 jobs • Trade space 1 job per 70 sqm (similar to warehousing, real densities will vary depending on the retail element within the space) = 98 jobs • Larger B2/B8 uses: <ul style="list-style-type: none"> ○ If 100 percent B2 uses at 1 job per 36 sqm = 379 jobs ○ If 100 percent B8 uses at 1 job per 70 sqm (general warehousing) = 195 jobs ○ If 50 percent B2/50 percent B8 = 154 jobs. <p>Thus the maximum likely jobs generation, assuming larger space is primarily used for B2 general industry, is 622 jobs. A lower estimate, assuming the larger space is primarily used for B8 warehousing, is 438 jobs. The mid-range, with a mix of B2/B8 accommodation delivered, would be 551 jobs. As no agreement has been reached about the final size and mix of retail/food options on this site it is not possible to estimate the jobs which could be generated from these uses.</p> <p>Local Plan and Community Infrastructure Levy Economic Viability Study (2014) suggests that a viable scheme can be delivered here. Financial Appraisals for the Viability Study suggest a surplus of £5,147,119 (10.7 percent of Gross Development Value). This appraisal assumed quite a large amount of A1/A3 retail development (12,537 sqm) against 32,504 sqm of B1/B2/B8 uses and study conclusions suggested that, dependant on the costs of the sports facilities, the amount of enabling development could be reduced.</p>	<p>This location may not be attractive to operators who specifically support the Port of Liverpool, particularly given the alternative sites available in South Sefton. However, delivery of the Brooms Cross Road (A5758) will greatly improve the accessibility of this site to the Port and M57/M58 motorways.</p>		
Sub-Total	28.10				
South Sefton					
MN2.46 and MN3: Land East of Maghull	20.00	<p>Three main developers promoting the site Persimmon, Taylor Wimpy, Hallam Land Management.</p> <p>Proposals, as set out in the Local Plan, are for:</p> <ul style="list-style-type: none"> • 1,400 dwellings • 20 ha B1/B2/B8 business park • Local retailing • Landscaping and amenity features. 	<p>As Sefton's only employment site with direct motorway access, this land will clearly be most desirable to occupiers for whom strategic road access is essential. This may include larger manufacturing companies but is particularly likely to favour B8 logistics operations.</p>	<p>Administrative and support service activities Construction Professional, scientific and technical activities</p>	5+

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
		<p>No developer has yet been secured for the business park element. As yet, there is no legal linkage between the housing and employment elements of the scheme, beyond the submitted Local Plan requirement that serviced plots should be made available on 25 percent of the business park before the 500th house is completed.</p> <p>A major gas main runs through the south of the site, from east to west, through the approximate centre of the strip of land currently proposed for B1/B2/B8 uses. HSE PADHI Guidance suggests the following limitations on uses within that zone - <i>“Workplaces (predominantly non-retail) providing for 100 or more occupants in any building or 3 or more occupied storeys in height” are regarded as ‘level 2’ development which would not be permitted within the buffer zones”</i> Transco have an 8m easement either side of the centre line of the pipe. It is assumed that these areas would be used to accommodate road, planting and parking if the pipe cannot be relocated.</p> <p>As noted in the next column, it is suggested that this would be a viable location for B8 logistics uses, with flexibility to accommodate larger B2 manufacturing operations should demand be identified. Logistics requirements can vary considerably, with the largest National Distribution Centres exceeding 80,000 sqm in size. At present the average requirement is for 23,000 sqm units on sites of 10 ha each. Two such facilities could be delivered on the Maghull site.</p> <p>In addition to meeting demand this use would have a number of practical advantages in terms of delivery:</p> <ul style="list-style-type: none"> • Simplified preparation – Preparing only 2-4 development plots will be easier and cheaper for the development partners, encouraging early delivery of the employment element • Improved values – The ‘per unit’ construction cost for building logistics accommodation is around half that of building an equivalent stock of office or industrial units, while rents/prices can be high and occupiers, if renting, are usually willing to invest in longer term leases. The result can be good profitability for developers while landowners may benefit from improved values which could go some way to compensating them for the loss of residential options on their part of the site • Meeting sub-regional needs – Developing this land for B8 (or larger B2) options will allow Sefton to make a contribution to meeting the needs from Port growth. 	<p>This site is extremely well placed strategically for the Port, links to the M57/58 and other established logistics locations such as Skelmersdale and Knowsley Industrial Estate. It does not suffer quite the same level of immediate congestion as sites along Dunnings Bridge Road. It is also accessible by rail and to the local population.</p> <p>Demand for B8 logistics sites locally has been well established through this study, with market research identifying region wide B2/B8 requirements of up to 50,000 sqm and local demand for units up to 10,000 sqm in size. Nearby MN2.47(b): Atlantic Park is already attracting some interest from larger logistics operators. This also reflects the latest research on Port Growth which indicates demand for a further 400-500 ha of land for associated uses across the City Region and beyond. Finally, there is a regional and national shortfall of viable logistics sites.</p> <p>While some 27 ha of undeveloped expansion land exists on logistics sites in nearby Skelmersdale this remains a relatively modest stock of land compared to projected needs. Land a Maghull is some 6 km closer to the Port than these sites and more directly accesses the M58.</p> <p>There is no evidence of demand for larger offices at this location. Although there is some interest in B1(a) options at MN2.47(b): Atlantic Park, the office market in Sefton remains limited compared to the industrial/warehouse sectors and an office park at this location would struggle to compete with Liverpool City Centre and Liverpool Waters. Market comments suggests that major office occupiers remain unwilling to consider peripheral locations in the Liverpool Conurbation such as Maghull.</p> <p>Smaller B1(a, c)/B2/B8 options may also be viable here, reflecting local demand for units of up to 500 sqm. These could be accommodated on the employment area as envisaged in the current</p>	<p>Storage and distribution Manufacturing</p>	

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
		<p>It is suggested that the current linear site layout, as shown in the indicative masterplan, is not best placed to meet logistics (and larger B2) needs. While careful design could adapt the current site layout to accommodate some options a 'squarer' site would be better placed to support one or more 'big box' logistics sheds and be divided into large plots. The main access road should ideally run along the edge of the employment site, rather than through the middle, to maximise the size of the plots which could be delivered or possibly allow the whole site to be developed for a single occupier and to create a buffer to residential and other uses. The employment land should be as close to the M58 junction as possible, and possibly have direct access from the motorway roundabout. However, it is accepted that it may need to move away from the southern boundary of the site to allow for the gas main easements.</p> <p>It is suggested that the Council negotiate with the relevant parties and determine revised range of suitable masterplan options, which take all issues into account.</p> <p>If the site was developed for two 23,000 sqm B8 units (46,000 sqm), then using a standard HCA density of 1 job per 80 sqm for large scale warehouses the site would generate 575 jobs. The largest single warehouse that could be delivered here would be around 78,000 sqm in size. By the same measure it would generate 975 jobs. If the equivalent amount of space was delivered for B2 manufacturing, employment levels would be much higher at 2,167 jobs 1 job per 36 sqm.</p> <p>If the business park remained in its current configuration then most development would be for smaller B1(a), B1(c), B2 and B8 uses. The mix of employment uses is harder to predict, but assuming an even split between these options, the following jobs could be provided:</p> <ul style="list-style-type: none"> • 19,500 sqm of B1(a) at 1 job per 10 sqm = 1,950 • 19,500 sqm of B1(c) at 1 job per 47 sqm = 414 • 19,500 of B2 at 1 job per 36 sqm = 542 • 19,500 of smaller B8 at 1 job per 70 sqm = 279 <p>A maximum of 3,185 jobs would therefore be possible.</p>	<p>masterplan. Local demand is healthy and a business park at this location would have the advantage of direct motorway access. However, the 20 ha business park site could deliver some 78,000 sqm of small business space and given likely provision of such units on land north and south of Formby Industrial Estate, at the MN2.47(a): former Peerless Refinery, MN2.47(c): Senate Business Park and elsewhere on Dunnings Bridge Road during the Plan Period it is important not to oversupply the area. Thus if MN2.46 and MN3: Land East of Maghull is taken forward as a primarily small business scheme it is suggested that further demand research is required to determine if local and sub-regional demand can support this scale of provision, at this location.</p>		
MN2.47(a) (Formerly BL159): former Peerless	5.80	<p>Owner Chancerygate's goal is to remediate the site and seek outline consent for B1/B2/B8 employment uses. Chancerygate would look to release land on a design and build basis.</p> <p>Chancerygate have taken steps to assess the level of site contamination</p>	<p>The owner has received a number of enquiries for the land from various potential occupiers in industrial sectors, including some warehouse based uses. Demand at this location therefore appears reasonable although, reflecting demand</p>	<p>Manufacturing Construction Transportation and Storage</p>	1-3

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
Refinery, Dunnings Bridge Road, Netherton		<p>and begin site remediation. It is expected that that site remediation costs will lead to viability gap, which may require an element of higher value, non B-Class development to address this.</p> <p>The latest proposals from Chancerygate suggest a priority of relocating existing local businesses from Sefton and the wider Liverpool City Region onto the site alongside some enabling development of non B-Class uses. It is expected that the scale of non B1/B2/B8 enabling development will represent no more than 25-30 percent of the total development, which is broadly consistent with Policy MN2 of the emerging Local Plan.</p>	<p>patterns elsewhere on Dunnings Bridge Road, is expected to include an element of trade and retail use.</p> <p>Although change may still be dependent on obtaining some gap funding or agreeing an element of higher value use, to overcome the land contamination issues, the assumption is that Chancerygate will proceed with a development scheme in the short/medium term independent of activates elsewhere on Dunnings Bridge Road.</p> <p>Valuation research, undertaken in late 2014 for the Dunnings Bridge Road Investment Strategy (2015) broadly supports Chancerygate's assertions that development here is not viable if 100 percent of the site were developed for light industrial and warehousing uses. A loss of around 8 percent against costs was recorded against such a scenario. An element of higher value use would therefore appear to be justified although an alternative approach, put forward in the Investment Strategy would be development of the site for a single large warehouse premises which would have a much lower per unit development cost.</p> <p>Based on market research, the Dunnings Bridge Road Investment Strategy suggests that the following mix of uses could be successful here:</p> <ul style="list-style-type: none"> • Light industrial units of up to 500 sqm each (on the frontage) • An element of trade/wholesale use here (20-40 percent) to increase values, and help overcome site constraints. • Larger B2 industrial premises of 5,000-6,000 sqm each to rear. 		

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
<p>MN2.47(b) (Formerly BL112/BL161): Atlantic Park, Dunnings Bridge Road, Netherton</p>	<p>16.80</p>	<p>Royal London report a flexibility as to how the site is ultimately brought forward for development (i.e. with the retention or demolition of existing large premises onsite), depending on who they can ultimately secure as occupiers.</p> <p>Viability research, undertaken for the Dunnings Bridge Road Investment Strategy (2015) suggests that MN2.47(b): Atlantic Park is the most readily developable site within the Dunnings Bridge Road area based on the potential financial returns. This reflects the current demand for, and financial viability of, large-scale warehouse development where a combination of long lease terms, strong rental levels, strong yield and relatively low build cost generate a high return. The development of this site should be able to deliver a profit for the developer, if developed as large B8 unit for appropriate leasehold.</p> <p>The Dunnings Bridge Road Investment Strategy put forward two options for the development of this site:</p> <ul style="list-style-type: none"> Option A: A single new build warehouse premises of some 46,000 sqm (replacing the existing Big Ft2 (former Rolls Royce) building) to meet the requirements of a specific occupier Option B: Retention of the existing 27,000 sqm former Rolls Royce manufacturing building. Refurbishment and sub-division of the property to accommodate occupiers of 4,500-5,500 sqm. Development of other land for industrial/warehouse units of 4,500-5,500 sqm. 	<p>Site is actively being marketed to B2 manufacturing and B8 logistics operators. Royal London Asset Management report a significant increase in interest at MN2.47(b): Atlantic Park since the announcement of the 'Superport' proposals, primarily as MN2.47(b): Atlantic Park is the closest strategic development site to the Port of Liverpool.</p> <p>Royal London has been in negotiations with a logistics operator for 18 months who have a requirement for a modern 46,000 sqm logistics building. This would be developed, by Royal London, on the site of the former Rolls Royce building and available land to the south.</p> <p>However, Royal London has also received a number of equally promising enquiries from Merseyside industrial/warehouse companies looking for 4,500-5,500 sqm. These could be accommodated within the existing former Rolls Royce building. In the short term at least, these appear most likely to be realised.</p> <p>Demand here has improved significantly over 2014/15 and an improvement in occupancy is likely here in the short/medium term, even if it is occupancy of existing premises rather than new development.</p> <p>Current level of demand may also support more office development on the Dunnings Bridge Road frontage (which could accommodate another 9,000 sqm (approx.) of space). However, any development would be to provide design and build options for secured occupiers only. Royal London has ruled out further speculative development here</p>	<p>Administrative and support service activities Manufacturing Professional, scientific and technical activities Storage and distribution</p>	<p>5+</p>
<p>MN2.47(c) (Formerly BL156_3/BL156_5): Senate Business</p>	<p>4.20</p>	<p>The Council has received offers for the site under a formal tendering process and as at July 2015 is considering the options that the tenders offered.</p> <p>The Dunnings Bridge Road Investment Strategy put forward two options for the development of this site:</p>	<p>Demand at this location has been established through the confidential responses to the recent tendering process. Prior to the tendering process the Council received enquiries for warehouse units of around 3,000 sqm here.</p> <p>Viability research, undertaken at the end of 2014</p>	<p>Storage and distribution Manufacturing</p>	<p>1-3</p>

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
Park, Netherton		<ul style="list-style-type: none"> Option A: A single manufacturing or logistics property of up to 16,000 sqm to meet the identified demand for logistics/B2 manufacturing options resulting, at least in part, from Port growth. Option B: Mix of light industrial units of up to 500 sqm, or larger B2 industrial premises of 5,000-6,000 sqm to meet current needs for smaller premises, for local firms. 	for the Dunnings Bridge Road Investment Strategy suggests that a development of larger industrial/logistics premises here, which will have a correspondingly lower unit cost, would deliver a surplus. However, given the marginal nature of industrial development at that time, the surplus generated was expected to be modest.		
MN2.51 (formally BL163_2): Switch Car Site, Wakefield Road, Netherton	4.69	<p>The owner, UK Car Group wishes to bring this site forward for development and has indicated that it may have some (confidential) parties interested in land here. The developer has the funds to fully deliver a redevelopment scheme without public sector support. However, UK Car Group also argues that an element of higher value uses would need to be included within any development to ensure financial viability.</p> <p>UK Car Group indicated a willingness to participate in a wider development scheme, incorporating other plots within Heysham Road, to deliver a new site access off Heysham Road.</p>	<p>The site has been on the market for 5 years, with a headline value of £2 million. It has attracted interest from a supermarket and several industrial occupiers looking for land on short term lets. However, site issues have meant that a deal could not be reached.</p> <p>Modest demand appears to exist at this location and the land is very prominently located on the strategic road network. However, this site has constrained access and development here would be more effective if it could take in neighbouring landholdings to better link it to the Heysham Road/Dunnings Bridge Road junction.</p> <p>The costs of providing infrastructure to this site are expected to be high and valuation research, undertaken for the Dunnings Bridge Road Investment Strategy (2015) indicates that purely industrial/office scheme will not deliver the necessary values to make the scheme viable (although viability research here did not just look at site MN2.51, but rather included adjacent land parcels which may have redevelopment potential). The Investment Strategy therefore recommended that any scheme include an element of higher value retail/leisure uses. In addition to boosting site specific values, such uses would better serve the Dunnings Bridge Road area and meet the suggested need for a greater roadside services along this strategic road corridor. The mix of uses could include:</p> <ul style="list-style-type: none"> Petrol Filling Station Hot food outlets Pub-restaurant Convenience retail (e.g. mini-mart). 	Administrative and support service activities Construction Manufacturing Professional, scientific and technical activities Storage and distribution	5+

Name	Net Size, ha	Proposals	Market Attractiveness	Likely development potential (sectors)	Availability, years
MN2.52 (formerly BL158): Land at Farriers Way, Netherton	0.53	On the market for design and build development for in excess of ten years	<p>A long term design and build opportunity site. Farriers Way Industrial Estate as a whole is popular and Hansteen report good interest for smaller units of 50 sqm, from both start-up businesses and existing micro firms, with the number of requirements exceeding supply. However, the Estate is not presently attracting interest from larger, established firms who might look for to invest in a design and build option. It is not clear if an improving local market will significantly alter this position, particularly if developments at nearby MN2.47(b): Atlantic Park, MN2.47(a): former Peerless Refinery and MN2.51: Switch Car deliver competing design and build sites which are more prominently located on the Dunning's Bridge Road Corridor.</p> <p>Hansteen are asset managers rather than developers and it is considered unlikely that they would develop this site themselves as an extension to the existing industrial estate. This does not preclude a third party development.</p>	Manufacturing Construction	5+
MN2.53 (formerly BL149): former Lanstar Site, Hawthorne Road, Bootle	0.97	Planning permission for 2,592 sqm of employment space, linked to development of the adjacent foodstore (which opened in 2009). In 2012, the owner received a three year extension in which to deliver the employment floorspace which is expected to lapse shortly	Located next to the good quality Kingfisher Business Park this would be a desirable location for B1(c) light industrial uses. However, given the ongoing delays in bringing this forward, it is unclear what commitment to development the current landowner has.	Manufacturing Construction	5+
MN2.54 (formally BL260): Linacre Bridge, Linacre Lane, Bootle	1.01	Temporary car wash on site Owner may have aspirations for non-employment uses (affordable housing)	Relatively prominent site on a main route into Bootle Town Centre. Part of an existing budget quality employment area although the land is increasingly bounded by housing and thus development here would have to be for uses that can co-exist with residential uses.	Administrative and support service activities Construction Manufacturing Professional, scientific and technical activities	3-5
Sub Total	54.00				
Total	82.10				

Source: **BE Group/Sefton Council, 2015**

- 6.4 There are 11 sites totalling 82.10 ha (net). This compares to an employment land supply of 57.96 ha, comprising 18 sites, in the previous Employment Land and Premises Study Refresh (2012). The changes since 2012 reflect a rationalisation of the Borough's land supply which has seen nine sites (three in North Sefton, six in the South) excluded from the emerging Local Plan supply on the grounds that they are unlikely to come forward. These were primarily plots of less than 2 ha and totalled 11.58 ha.
- 6.5 Conversely, Local Plan policy now includes three large new proposed allocations – MN2.46 and MN3: Land East of Maghull, Land North of Formby Industrial Estate and MN2.49 and MN5: Land South of Formby Industrial Estate – which add some 35 ha (net) to Sefton's supply. These new sites are discussed further below. The site sizes of several existing sites, notably MN2.50: Southport Business Park have also been recalculated to take account of changing conditions on the ground.
- 6.6 As Table 34 above shows, all of the employment sites proposed are developable and deliverable, even if some of the smaller sites in South Sefton – notably MN2.53: former Lanstar Site, Hawthorne Road, Bootle and MN2.52: Land at Farriers Way, Netherton – appear to be long term development prospects. None are being held for the use of specific businesses, and in principle, all should be able to provide development land within the Local Plan period.
- 6.7 For the most part Local Plan sites have already been netted down to exclude any land proposed for non B-Class development, particularly the three new allocations at Formby and Maghull. However, an element of enabling development is also likely to be needed at MN2.51 (formally BL163_2); MN2.51: Switch Car Site, Wakefield Road, Netherton and MN2.47(a) (formerly BL159); MN2.47(a): former Peerless Refinery, Dunnings Bridge Road, Netherton, to secure development. This study does not wish to prejudice any ongoing or future negotiations by stating what proportion of non B-Class development is required, however, if an indicative figure of 30 percent was applied it would result in the loss of 3.15 ha of B1/B2/B8 land.

Sites Analysis

- 6.8 Table 35 shows how the land is distributed across Sefton. Around a third of the supply (28.10 ha) is in North Sefton and now focused at MN2.50: Southport Business Park, along with the new proposed allocations at Formby. Two thirds of the supply (54.00 ha) is in South Sefton. This is centred on the Dunnings Bridge Road Corridor area, Netherton, the historic focus of (non-Port Related) economic activity in the sub

area. By comparison the supply in Bootle is modest, comprising just 1.98 ha in two sites, 5.8 percent of the South Sefton supply.

Table 35 – Distribution of Employment Land

Area	Number of Sites	All Employment Land, ha	Serviced Land, ha
North Sefton	3	28.10	-
Southport	1	13.10	-
Formby	2	15.00	-
South Sefton	8	54.00	
Bootle	2	1.98	0.97
Maghull	1	20.00	-
Netherton	5	32.02	17.33
Total	11	82.10	18.30

Source: BE Group 2015

- 6.9 Out of the total land supply of 82.10 ha, 22.3 percent (18.30 ha) is serviced, all in South Sefton. The serviced land is focused at MN2.47(b): Atlantic Park, where infrastructure is in place and development plots have been provided.
- 6.10 A site is assumed to be serviced if utilities and road access are readily available. This would apply to infill sites in existing employment areas or where major sites have been opened up. Large allocations, where although services run to the edge of the site they have not been provided into the site itself, are not considered to be serviced. For this reason, the 13.10 ha, MN2.50: Southport Business Park, while it includes some completed premises, cannot be considered serviced until the relevant infrastructure is delivered, the main constraints addressed and development plots prepared.
- 6.11 Each site has been assessed for its expected availability, the point at which it may come to market or be developed (see Table 36). This is derived from consultations with owners, occupiers, agents, the Council and other evidence gathered in this study.
- 6.12 Development is not currently taking place on any of Sefton's employment sites and none of them is likely to be fully developed within a year. The most active sites at present, which have the prospect of being largely completed in three years, are MN2.47(c): Senate Business Park and (subject to funding) the MN2.47(a): former

Peerless Refinery, Netherton. On Senate an exercise to tender for a developer has now been completed while at the MN2.47(a): former Peerless Refinery, the owners are in active negotiations with the Council over a preferred scheme.

Table 36 – Land Availability

Area	Hectares Available, years (Number of Sites)				
	0-1	1-3	3-5	5+	Total
North Sefton	-	-	7.00 (1)	21.10 (2)	28.10 (3)
Southport	-	-	-	13.10 (1)	13.10 (1)
Formby	-	-	7.00 (1)	8.00 (1)	15.00 (2)
South Sefton	-	10.00 (2)	1.01 (1)	42.99 (5)	54.00 (8)
Bootle	-	-	1.01 (1)	0.97 (1)	1.98 (2)
Maghull	-	-	-	20.00 (1)	20.00 (1)
Netherton	-	10.00 (2)	-	22.02 (3)	32.02 (5)
Total	-	10.00 (2)	8.01 (2)	64.09 (7)	82.10 (11)

Source: BE Group, 2015

- 6.13 9.8 percent of the supply (8.01 ha) comprises land of mid term availability (3-5 years). This includes MN2.49 and MN5: Land South of Formby Industrial Estate which, while it appears to be the faster moving of the two Formby sites will still need time to overcome constraints, deliver the sports facilities and develop the mix of uses envisioned. However, it should be noted that neither of the two new Formby sites nor the MN2.46 and MN3: Land East of Maghull can progress until the Sefton Local Plan is adopted, as all three sites are currently in the Green Belt.
- 6.14 The majority (78.1 percent, 64.09 ha) comprises a longer term supply which is unlikely to be brought forward in less than five years. While it is possible that development on MN2.46 and MN3: Land East of Maghull may come forward in less than five years, the scale of the infrastructure that needs to be provided here means that a longer term timeframe is more likely.

- 6.15 The longer term supply also includes large sites such as MN2.47(b): Atlantic Park where, notwithstanding the serviced nature of the land, the take up of the multiple plots is likely to be a long term process. Also MN2.51: Switch Car Site, Wakefield Road, Netherton and MN2.50: Southport Business Park where constraints need to be overcome, along with smaller sites in Bootle and Netherton where there is no immediate evidence of demand for land.
- 6.16 Forecasting, outlined in Section 9.0, has identified the following growth sectors in Sefton, which could require B-Class employment land:
- Administrative and support service activities.
 - Construction
 - Professional, scientific and technical activities
 - Transportation and storage (not predicted for major growth in forecasting but likely to see expansion due to market factors, including Port Growth).
- 6.17 Manufacturing is not identified as a growth sector but given the Borough's reasonable manufacturing base, and the comments of stakeholders, is expected to remain a significant part of the local economy.
- 6.18 Table 37 provides an assessment of which of the four main growth sectors, plus manufacturing, could be supported on each of Sefton's 11 employment sites. In North Sefton, MN2.50: Southport Business Park was conceived as a primarily office based location and most of the existing businesses in the area would fall into the administrative and support service activities or professional, scientific and technical activities categories. However, current market demand suggests that an element of manufacturing is also likely to be desirable here. Located in a comparative backland location, some distance from the motorway network, MN2.50: Southport Business Park is unlikely to be desirable for larger transportation and storage operations. However, smaller logistics businesses, specifically looking for a Southport base may still find this large site attractive. This is evidenced by the presence of a Royal Mail distribution depot in the existing business park.
- 6.19 At Formby, MN2.48 and MN4: Land North of Formby Industrial Estate is proposed for a diverse range of office and industrial premises that could support all of the growth sectors. Land to the south is proposed primarily for industrial and warehouse development.

Table 37 – Supporting Growth Sectors

Site	Growth Sectors				
	Administrative and support service activities.	Construction	Professional, scientific and technical activities	Transportation and storage	Manufacturing
North Sefton					
MN2.50: Southport Business Park	*	-	*	*	*
MN2.48 and MN4: Land North of Formby Industrial Estate	*	*	*	*	*
MN2.49 and MN5: Land South of Formby Industrial Estate	-	*	-	*	*
South Sefton					
MN2.46 and MN3: Land East of Maghull	*	*	*	*	*
MN2.47(a): former Peerless Refinery	-	*	-	*	*
MN2.47(b): Atlantic Park	*	-	*	*	*
MN2.47(c): Senate Business Park	-	-	-	*	*
MN2.51: Switch Car Site	*	*	*	*	*
MN2.52: Land at Farriers Way	-	*	-	-	*
MN2.53: former Lanstar Site	-	*	-	-	*
MN2.54: Linacre Bridge	*	*	*	-	*

Source: BE Group 2015

6.20 In South Sefton, MN2.46 and MN3: Land East of Maghull is large enough to support a diverse range of uses. However, in terms of market demand it would be most attractive to industrial and storage/distribution options (subject to the comments made elsewhere about site shape and position) to whom a position on the strategic road network, and access to the Port is key. Conversely, as the focus of the Liverpool City Region's office market appears to remain within the inner parts of the Liverpool Conurbation, it is less likely to attract office based operations.

6.21 Elsewhere in South Sefton, site condition, positioning, market demand and owner intentions generally favour manufacturing and, on larger sites, transportation and storage. The main exception appears to be MN2.47(b): Atlantic Park, where market intelligence suggests that office options are still likely on frontage sites. The prominently located MN2.51: Switch Car Site could also support administrative and support service activities and professional, scientific and technical options, if current site constraints could be overcome.

Site Grading

6.22 All sites have been graded using a standard scoring system (see Appendix 5). Each site is scored out of 90, made up of nine individual measures, each scored out of ten. These are: primary (motorway) route proximity, prominence, public transport, planning status, services availability, constraints, environmental setting, flexibility and availability. The detailed scores are provided in Appendix 6.

6.23 Two scores are provided in Table 38, a total score and a market-led score, which reflect the locational strengths and weaknesses of each site. The market-led score is comprises primary (motorway) route proximity, prominence, environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects, which combine to make up the total score, are much easier to improve and hence provide the ability to raise the quality of a site.

Table 38 – Sites Scoring

Site Ref.	Site Name	Sub Area	Land Available, ha	Total Score, max 90	Market-led Sub-total, max 40
MN2.47(b) (Formerly BL112/ BL161)	Atlantic Park, Dunnings Bridge Road, Netherton	South Sefton	16.80	67	36
MN2.53 (formerly BL149)	former Lanstar Site, Hawthorne Road, Bootle	South Sefton	0.97	60	26
MN2.47(a) (Formerly BL159)	former Peerless Refinery, Dunnings Bridge Road, Netherton	South Sefton	5.80	59	29
MN2.47(c) (Formerly BL156_3/ BL156_5)	Senate Business Park, Netherton	South Sefton	4.20	55	21
MN2.51 (formally BL163_2)	Switch Car Site, Wakefield Road, Netherton	South Sefton	4.69	54	27
MN2.46 and	Land East of Maghull	South Sefton	20.00	52	39

Site Ref.	Site Name	Sub Area	Land Available, ha	Total Score, max 90	Market-led Sub-total, max 40
MN3					
MN2.49 and MN5	Land South of Formby Industrial Estate	North Sefton	7.00	52	29
MN2.50 (formally SL112_10)	Southport Business Park	North Sefton	13.10	52	22
MN2.54 (formally BL260)	Linacre Bridge. Linacre Lane, Bootle	South Sefton	1.01	47	19
MN2.48 and MN4	Land North of Formby Industrial Estate	North Sefton	8.00	46	29
MN2.52 (formerly BL158)	Land at Farriers Way, Netherton	South Sefton	0.53	43	18

Source: BE Group 2015

6.24 The best scoring site overall is MN2.47(b): Atlantic Park, Dunnings Bridge Road, Netherton. This is a large, prominently located site, close to Switch Island. It is part of a high quality, mixed-use employment area, split into plots, with infrastructure in place. By the market-led subtotal MN2.46 and MN3: Land East of Maghull is the best performing site reflecting its large size and immediate motorway access. Unlike MN2.47(b): Atlantic Park, however, the site is unserved.

6.25 The worst performing site overall and in market terms, is MN2.52: Land at Farriers Way, Netherton. This reflects the site's backland position, small size and lack of short term development prospects.

New Employment Locations

6.26 Local Plan policy now includes three large new proposed allocations – MN2.46 and MN3: Land East of Maghull, Land North of Formby Industrial Estate and MN2.49 and MN5: Land South of Formby Industrial Estate. The future potential of these locations is considered here, informed by discussion with owners, developers and their agents, officers and other parties, undertaken for this study.

MN2.46 and MN3: Land East of Maghull

6.27 Proposals here, as set out in the Local Plan, are for:

- 1,400 dwellings
- 20 ha B1/B2/B8 business park
- Local retailing
- Landscaping and amenity features.

- 6.28 The indicative masterplans submitted at the 'Publication stage' of the Local Plan preparation would see the employment area element delivered on a linear site running along the south of the wider development area, parallel to the motorway. The justifications for this is that it provides a buffer between the housing and the M58 and fits in with a main east-west access road proposed adjacent. It is planned to improve accessibility to the M58 by the provision of slip roads on the south side of junction 1 by 2020. This configuration also splits the B-Class element amongst multiple landowners, so no owner is excessively burdened with lower value uses.
- 6.29 In terms of market demand, as Sefton's only employment site with direct motorway access, this land will clearly be most desirable to occupiers for whom strategic road access is essential. This may include larger manufacturing companies but is particularly likely to favour B8 logistics operations. This site is extremely well placed strategically for the Port, links to the M57/58 and other established logistics locations such as Skelmersdale and Knowsley Industrial Estate.
- 6.30 It is suggested that the current linear site layout, as shown in the indicative masterplan, is not best placed to meet logistics (and larger B2) needs. While careful design could adapt the current site layout to accommodate some options, a 'squarer' site would be better placed to support one or more 'big box' logistics sheds and be divided into large plots. The main access road should ideally run along the edge of the employment site, rather than through the middle, to maximise the size of the plots which could be delivered or possibly allow the whole site to be developed for a single occupier and to create a buffer to residential and other uses. The employment land should be as close to the M58 junction as possible, and possibly have direct access from the motorway roundabout. However, it is accepted that it may need to move away from the southern boundary of the site to allow for the gas main easements.
- 6.31 The linear employment area can however, meet a range of smaller business requirements. This study has found healthy demand for primarily industrial and warehouse units of up to 500 sqm to meet local needs. Against this demand there is an undersupply of modern, moderate or good quality premises of up to 1,000 sqm and particularly units of 500-800 sqm. 20 ha of land, 78,000 sqm of floorspace at 3,900 sqm/hectare, would be a considerable resource of land to meet such requirements, capable of accommodating all of the likely growth sectors, and have the advantage of direct motorway access. However, careful marketing and phasing of this site would be required, given similar proposals for small business premises

developments at Formby and around Dunnings Bridge Road, to ensure that Sefton was not oversupplied with any element of space at any point during the Plan period.

- 6.32 As an initial approach, it is therefore recommended that a masterplan layout be coordinated to provide a mix of flexible accommodation of B8 in isolation which could meet with the specific demand of individual or multiples occupiers if that demand arose. Overall masterplanning should consider accommodating a range of options for the size of the plots which could be delivered or possibly allow the whole site to be developed for a single occupier if that demand was proven. If the access road also serves housing and where there would be large volumes of HGV traffic then a junction on that access road should be provided to separate off HGV traffic
- 6.33 Jobs output on this site would vary considerably depending on the final agreed mix of uses. If brought forward as logistics site then current market demand for larger warehousing would favour two 23,000 sqm B8 units (46,000 sqm), on 10 ha of land each. Using a standard HCA density of 1 job per 80 sqm for large scale warehouses the site would generate 575 jobs. The largest single warehouse that could be delivered here would be around 78,000 sqm in size. By the same measure it would generate 975 jobs. If the equivalent amount of space was delivered for B2 manufacturing, employment levels would be much higher at 2,167 jobs 1 job per 36 sqm.
- 6.34 If the site accommodated a development of smaller B1(a), B1(c), B2 and B8 properties, the mix of employment uses is harder to predict, but assuming an even split between these options, a maximum of 3,185 jobs could be provided.

MN2.48 and MN4: Land North of Formby Industrial Estate

- 6.35 Plans are advancing at this location and a masterplan has been prepared which, if realised in its entirety, would deliver 38,833 sqm of space in the following uses:
- 20,903 sqm of B2/B8 premises in seven units of 1,858-5,574 sqm
 - 3,252 sqm of B1(c) starter units
 - 5,295 sqm of B1(a) offices/starter offices
 - 3,623 sqm of trade space
 - 5,760 sqm of hybrid space.
- 6.36 Using this masterplan as a base, the maximum likely jobs generation from this site, assuming larger space is primarily used for B2 general industry, is 1,355 jobs. A

lower estimate, assuming the larger space is primarily used for B8 warehousing, is 1,073 jobs. The mid-range, with a mix of B2/B8 accommodation delivered, would be 1,213 jobs.

- 6.37 Issues of site access onto the Formby Bypass still need to be addressed, and design will have to reflect site flood risk and ecological issues, however, market demand is not expected to be a significant barrier to development. Evidence of demand here comes from developer interest in the opportunity and the fact that the existing Formby Industrial Estate is fully occupied. The scheme is likely to deliver smaller office space early in the Plan period, which can meet the needs of the two key growth sectors - administrative and support service activities and professional, scientific and technical activities. By comparison MN2.50: Southport Business Park is more likely to provide larger offices. The site, along with land to the south, will also be a useful source of smaller industrial/warehouse space in North Sefton, reflecting the fact that much of the existing stock locally is aging and of budget quality.

MN2.49 and MN5: Land South of Formby Industrial Estate

- 6.38 Proposals here are slightly more advanced than in the north in that a developer (St Modwen) has been secured for the site. This will be followed by further research into site conditions, including the high levels of flood risk in the east of the site.
- 6.39 The employment element forms part of a broader mixed-use development which is expected to include convenience and comparison retail options and hot food uses. The mix of uses, reflecting possible impacts on Formby Town Centre, will need to be agreed. Replacement facilities for Formby Football Club will also need to be provided. A new Sports Centre is proposed at a cost of £2-3 million, with expected delivery in 2016/17.
- 6.40 Again while site access, flood risk and agreeing enabling development are barriers to be overcome, market demand is not felt to be a constraint on delivery. Formal marketing has not commenced here. However, site owners and agents report receiving a healthy number of informal enquiries for land and premises from local firms. Demand appears to be for B1(c) light industrial uses and B8 trade uses. This reflects the fact that the existing Formby Industrial Estate, which is dominated by B1(c) and B8 premises, is fully occupied with few good quality alternatives in North Sefton.

- 6.41 The amount of B1/B2/B8 space to be delivered here has yet to be agreed. However, the most recent research, likely to be amended once the site masterplan is completed, suggests that some 12,300 sqm of space could be provided. This appears quite a low density of development, given that the capacity of the site, at a standard developer ratio of 3,900 sqm/hectare could be 27,300 sqm.
- 6.42 No split between the uses has been provided so an assumption (indicative only) is made that a quarter of this space is developed for B1(c) uses (6,825 sqm), a quarter for B8 trade and half for larger B2/B8 options (13,650 sqm).
- 6.43 Based on these figures the maximum likely jobs generation, assuming larger space is primarily used for B2 general industry, is 622 jobs. A lower estimate, assuming the larger space is primarily used for B8 warehousing, is 438 jobs. The mid-range, with a mix of B2/B8 accommodation delivered, would be 531 jobs. As no agreement has been reached about the final size and mix of retail/food options on this site it is not possible to estimate the jobs which could be generated from these uses.
- 6.44 The offer proposed for MN2.48 and MN4: Land to the North of Formby Industrial Estate is similar to that in MN2.49 and MN5: Land to the South of Formby Industrial Estate. Both are proposing strong elements of B1(c) light industry and B8 trade units. In particular, both are proposing plots for larger B2/B8 units of 1,000 sqm or more. If, as appears likely, larger plots at both locations are offered on a Design and Build basis to established firms then it is likely that both sites will be competing to attract potential occupiers from the limited pool of companies who would want a new build unit in North Sefton.
- 6.45 Despite this, initial demand evidence, in the form of informal enquiries in the south and developer interest in the north, does suggest that sufficient market requirements exist to support both sites. Delivery of space on MN2.49 and MN5: Land to the South of Formby Industrial Estate is also expected to occur in a shorter timeframe than land in the north. Such a staggered approach to new development around Formby should be encouraged by the Council minimise the risk that the two sites deliver similar property elements at the same time, at least for the smaller property options. Rather the two locations will likely provide an ongoing offer of space throughout the plan period in North Sefton.

Aligning Supply and Need Dates

- 6.46 This study measures need back, from 2015, to 2012. This allows consideration of the whole Local Plan period 2012-2030 but does mean that the base date for measuring need (2012) is out of alignment with the base date for measuring supply (2015). To ensure the two align it is appropriate to add back into the supply total completions that have occurred since 2012, indicating Sefton's land potential at that time. As noted in Section 8.0, 6.49 ha of land has been taken up in the Borough over 2012-2015 meaning that the 2012 supply position is **88.59 ha**.

Employment Areas Assessment

- 6.47 Here assessments are provided for the 20 existing Employment Areas and Employment Opportunity Sites in Sefton. Together they represent 312.03 ha. Some 23.4 percent of this total is represented by land at Bridle Way Industrial Estate (72.88 ha). Another 17.0 percent is at nearby Heysham Industrial Estate (53.18 ha). Indeed almost half of Sefton's developed land supply (155.11 ha) can be found off Dunnings Bridge Road or at the adjacent Aintree Racecourse Retail and Business Park.
- 6.48 Proformas have been completed for each area and are accompanied by site plans. These are included at Appendix 7. The proformas adopt the following format, similar to that used in Sefton's previous Employment Land and Premises Studies, to simplify the data and make it easier to interpret. The 'Address' contains the local authority's designated title for the area, including where necessary the main street and town. The local authority's planning policy descriptor is provided. A brief 'Description' is provided in the form of BE Group's comment on the area. Area boundaries are based on GIS plans provided by the Council.
- 6.49 Where feasible the 'Total Number of Units' within the area has been identified from the physical site survey. 'Vacant or Derelict Units' have been identified from a combination of the site surveys and interrogation of the data collated for the vacant property schedules (Appendix 2). The proportion between these two equates to the 'Occupancy Rate'.
- 6.50 'Predominant Use Class' identifies whether buildings in the area are mainly in office/light industrial (B1); general industrial (B2) or warehouse (B8) uses. Other use classes are mentioned where they are found within the area boundary.

- 6.51 An indication is provided of the age of properties in each of four categories assessed in 'Buildings Age'. These are pre-1945; 1945-1990; 1990-2000; 2000+ (new).
- 6.52 'Buildings Quality' is also broken down into four category assessments. 'Derelict' is self evident. 'Poor' represents low quality design, externals, and condition. 'Good' equates to modern design, building condition, parking and external area provision. The remaining category is 'Average', covering properties that do not fit any of the other three headings.
- 6.53 'Area Size' is the hectareage calculated from GIS, and the site boundaries provided by the Council. It should be noted that site sizes have been recalculated since the 2012 Employment Land and Premises Study Update.
- 6.54 'Grade' refers to BE Group's professional opinion on the ranking that should be afforded to the individual area. This has been based on a number of factors – critical mass of the area, companies like to cluster; accessibility, the closer to motorways and arterial roads the better; prominence, to main roads, and environment – setting of the location, servicing, parking and landscape treatment. For each element assessments are made as Poor, Average or Good. Combining this data leads to an overall hierarchical assessment banded A to E. These are described in Table ... It should be noted that all areas have been reassessed and so the grade given to each area may be different from that given in the 2012 Employment Land and Premises Study.

Table 39 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors.	Protect strongly Support and expand
B/C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses.	Protect Support
C		
C/D	Lower quality locations in residential areas suffering from	Continue to

Grade	Definition	Action
D	poor accessibility and massing.	protect/review through the Local Plan
D/E	Very poor quality areas. Widespread vacancy and dereliction in poor environments.	Promote alternative uses if possible
E		

Source: BE Group 2015

- 6.55 General comments are made about the market conditions in the area. Finally the future role of the area is set out, incorporating BE Group's recommendations.
- 6.56 Table 40 contains a summary of the Employment Areas Assessment, subdivided between North and South Sefton. For each entry the total site area, BE Group's main market comments and grading are provided, together with recommendations regarding retention, remodelling, mixed use activity or de-allocation from employment use.
- 6.57 As Table 40 shows, most of Sefton's Employment Areas are active and well occupied. This includes industrial estates around Bootle, which continue to serve a function even if the premises is generally of budget quality. In the lowest quality locations, generally felt to include Birkdale Industrial Estate, North Sefton along with The People's Site and Land and Premises, Acorn Way, Bootle, South Sefton, there is a need for ongoing monitoring for signs of further decline or increased vacancy. If such a decline occurs, plans for regeneration or re-use will need to be considered. The Dunnings Bridge Road Investment Strategy also sets out proposals for regeneration and infill development in the Dunnings Bridge Road Corridor, primarily focused at Heysham Road Industrial Estate.

Table 40 – Summary of Existing Employment Areas

Site	Site Area	Description and Comments	Grading	Recommendations
North Sefton				
Birkdale Trading Estate, Liverpool Road, Birkdale	0.75	<p>Scheme of budget quality workshops, trade premises and lock up storage units in a dense backland site, with constrained access off Liverpool Road.</p> <p>At present the estate is almost fully occupied with a diverse range of local start-ups and micro businesses, who are making good use of one of North Sefton's largest backland sites. The location presently accommodates some 25 individual businesses on less than a hectare of land, plus 14 further tenanted storage units/storage containers.</p> <p>However, this location is undergoing change and there is a need for continuing monitoring to understand and account for the following issues:</p> <ul style="list-style-type: none"> • The growth of non B-Class occupation – Approximately half the current businesses in the area are in trade, A1 retail and A3 hot food uses. When the current position is compared to site surveys made for the 2010 and 2012 Sefton Employment Land and Premises Studies, the trend for occupation outside traditional B-Class uses appears to be increasing. If this continues and B1/B2/B8 operations may become a minority use at Birkdale Trading Estate and there could be a need to re-designate the area for local planning purposes • Premises Quality – The Trading Estate contains older, budget premises which is nearing the end of its economic life. While the location is clearly still meeting local business needs at present there is a need to monitor conditions to ensure this remains the case. One concern raised by stakeholders associated with site is the impact of the Energy Act 2011 (discussed below). • Occupancy Levels – Agents for the site report that it is becoming more challenging to attract new tenants to the location and the turnover of tenants is relatively high. Approximately two thirds of the units have changed occupier since 2011. Approximately eight units are occupied by tenants reported to be in arrears or otherwise unable to pay the full market rents. As most of the current leases will be due for renewal in the next few years, there is a risk that void levels may increase. <p>If the above issues do begin to impact on the location then there will be a</p>	<p>Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average</p> <p>Total Grade: D</p>	<p>Retain as local employment area for B1/B8 uses. Continue to monitor changing conditions over the Plan Period to identify any signs of decline and possible future regeneration or investment requirements.</p>

Site	Site Area	Description and Comments	Grading	Recommendations
		<p>need to plan for its future. While a redevelopment of the area for B-Class uses may be achievable, this backland site is unlikely to be particularly attractive to developers, especially while options remain around Formby Industrial Estate and Southport Business Park.</p> <p>Relocation of the existing occupiers within North Sefton could also be challenging given the current availability of premises on local industrial estates. Achieving it would likely require moving at least some businesses to other backland sites in Southport and Birkdale.</p>		
Blowick Industrial Estate, Southport	26.31	<p>Southport's largest industrial estate, with mix of trade counters and small industrial units.</p> <p>An area of older buildings on Crowland Close has been vacant and on the market for almost a decade. It remains available as a modest development opportunity although the experience of marketing suggests this is not a particularly desirable location for new premises.</p>	<p>Critical mass: Good Accessibility: Poor Prominence: Poor Environment: Poor</p> <p>Total Grade: C/D</p>	Retain as key local employment area for B1, B2, B8 uses. Consider opportunities for remodelling of redundant and underused sites, as they emerge.
Crossens Way, Southport	12.42	<p>Small employment area comprising Railex premises and United Utilities water treatment plant plus vacant allocated site.</p> <p>A small area of expansion land exists between the Railex building and United Utilities water treatment plant. This is previously a UDP employment site although there has been no evidence of demand for land here and the site is accordingly not retained as an employment development site in the emerging Local Plan.</p>	<p>Critical mass: Average Accessibility: Good Prominence: Good Environment: Poor</p> <p>Total Grade: C/D</p>	Retain as local employment development site for B1 and small B8 uses.
Formby Business Park, Altcar Road, Formby	13.94	<p>Mixed use area comprising industrial, retail and quasi retail uses.</p> <p>An established, mixed-use employment area which is well placed on the A586 Formby Bypass to serve North Sefton, while benefitting from improved access to the M57/M58 Motorways. The existing Business Park appears fully occupied with a range of mostly established local and regional/national firms.</p> <p>The encroachment of trade and retail uses north of Altcar Road has reduced options for B1 and B2 occupiers though, particularly on locations with Bypass and Altcar Road frontage. However, this will be addressed with the provision of two large employment sites north (MN2.48 and MN4: Land to the North of Formby Industrial Estate) and south (MN2.49 and MN5: Land to the South of Formby Industrial Estate). Formal marketing has not commenced on either site but land to the south has attracted informal requirements from a number of local businesses, while land to the north has attracted interest from four</p>	<p>Critical mass: Good Accessibility: Good Prominence: Good Environment: Good</p> <p>Total Grade: B/C</p>	Retain as local employment area. Consider more protection for B1/B8 uses.

Site	Site Area	Description and Comments	Grading	Recommendations
		developers. This provides evidence of further demand here.		
former Philips Factory, Balmoral Drive, Southport	6.00	<p>Former factory complex in a mostly residential area, now largely vacant and derelict.</p> <p>Main factory complex appears fully vacant and is moving into a state of dereliction. Only one portion of the area, at the junction of North Road and Balmoral Drive, remains occupied, primarily by Design Production Installation (DPI).</p> <p>The evidence is that the existing employment blocks no longer meet modern occupier requirements. Redevelopment or major refurbishment will be difficult and costly in a location tightly bound by housing on all sides. There is also no evidence of demand for redeveloped/refurbished premises at this backland location which is some distance from the other Employment Areas of North Sefton.</p> <p>With these issues in mind the current Local Plan proposal to reallocate this site for housing appears justifiable, although the loss of the 7.25 ha of employment land will need to be accounted for.</p>	<p>Critical mass: Poor Accessibility: Average Prominence: Poor Environment: Poor</p> <p>Total Grade: E</p>	Release for alternative uses based on current vacancy, increasing dereliction. If appropriate plan for the relocation of DPI
Kensington Industrial Estate, Southport	1.34	<p>Small linear densely developed scheme of light industrial and trade counter units.</p> <p>Provides a range of trade uses which complement the adjacent retail offer of Southport Town Centre.</p>	<p>Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average</p> <p>Total Grade: C</p>	Retain as local employment area for B1, B8 (trade counters) uses
Slaidburn Crescent, Southport	6.58	<p>Small, densely developed industrial estate of small industrial units. Has retail/trade counter use to Fylde Road frontage.</p> <p>Established local industrial estate in a mostly residential area, with little scope for growth. Accommodates some established local employers including Bell and Stork.</p>	<p>Critical mass: Good Accessibility: Average Prominence: Average Environment: Average</p> <p>Total Grade: C</p>	Retain as local employment area for B1, B8 uses
Southport Business Park, Town Lane, Southport	6.01 (Developed land only)	<p>Purpose designed out of town business park, predominantly comprising self-contained B1(a) offices.</p> <p>The Council has received further informal enquiries for land and premises here. Activity in the undeveloped portions of the area is considered separately above.</p>	<p>Critical mass: Average Accessibility: Good Prominence: Average Environment: Good</p> <p>Total Grade: B</p>	Retain as flagship office park for North Sefton. With some development of industrial, warehouse and motor retail uses, as outlined in the

Site	Site Area	Description and Comments	Grading	Recommendations
				mixed-use planning permission on part of the site.
Sub-Total	73.35			
South Sefton				
Aintree Racecourse Business Park, Aintree	10.77	Modern industrial estate adjoining Aintree Racecourse and Retail Park, comprising large Cash and Carry warehouse plus range of light industrial units. Established and prominently located business park.	Critical mass: Good Accessibility: Good Prominence: Average Environment: Good Total Grade: B	Retain as local employment area for B1, B2, B8 uses
Bridle Way Industrial Estate, Netherton	72.88	Large employment area containing mix of office, industrial and warehousing uses occupied by major employers. Large established employment area, accommodating a broad mix of small business units, multi-let business centre space, offices and larger factory and office complexes. Significant options for further growth exist at MN2.47(b): Atlantic Park and MN2.47(c): Senate Business Park. Change elsewhere is likely to be delivered through premises refurbishment. South of the former railway line, fronting Orrell Lane, (Trinity Park) land is now in use for retail and motor retail uses. Former Royal Mail premises to the rear now has consent for retail development plus the delivery of replacement B-Class premises. The Council has also received representations for housing at this location. Generally, this study does not support the loss of employment land, particularly where viability can be shown through the recent consent for employment generating uses and by the high levels of occupancy of local small business schemes such as Farriers Way Industrial Estate. However, it should be noted that the land shown on the housing plan, to the south east of Asda, is more likely to be used for retail, trade or motor trade uses, reflecting the development pattern to the north, than for B-Class employment.	Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: A	Retain as key employment area for B1, B2, B8 uses, as part of Dunnings Bridge Road Corridor
Deltic Way Industrial Estate, Netherton	18.28	Two schemes of modern light industrial units and offices (Deltic Way and Vesty Business Park), along with a further large office complex.	Critical mass: Good Accessibility: Good	Retain as local employment area for

Site	Site Area	Description and Comments	Grading	Recommendations
		With the completion of Vesty Business Park, this area is fully developed and well occupied, providing a good stock of modern premises for South Sefton. The Bootle Football Club Ground is considered unsuitable for redevelopment and could be removed from the Employment Area boundary.	Prominence: Good Environment: Good Total Grade: B	B1, B2, B8 uses
Heysham Road Industrial Estate, Netherton	53.18	Large, industrial estate in prominent location with substantial scope for enhancement. In addition to MN2.51: Switch Car Site and MN2.47(a): former Peerless Refinery, the Dunnings Bridge Road Economic Investment Strategy (2015) identifies scope for regeneration and redevelopment along the wider Dunnings Bridge Road frontage, south east to Leckwith Road. A detailed Delivery Plan is provided which is not repeated here, except to say that redevelopment in the Wakefield Road area is identified as key to opening up MN2.51: Switch Car site for development and providing access to Heysham Road.	Critical mass: Good Accessibility: Good Prominence: Good Environment: Poor Total Grade: B	Retain as key employment area within Dunnings Bridge Road Corridor. Consider opportunities for regeneration and redevelopment in line with the findings of the Dunnings Bridge Road Investment Strategy.
Land and Premises, Acorn Way, Bootle	5.22	A collection of small sites and buildings, poor quality and underused. Premises is of low quality and dominated by bad neighbour uses such as scrap metal dealers. However, the location presently retains a function, providing budget quality premises and yard space to local businesses. Ongoing monitoring is required to see if the area declines further and begins to see greater dereliction and site vacancy. At that time options for regeneration or redevelopment, as has occurred elsewhere on Hawthorne Road, should be considered.	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Poor Total Grade: D	Retain as local employment area for B1/B8 uses Consider opportunities for regeneration and redevelopment of redundant and underused sites as they emerge
Maritime Enterprise Park, Rimrose Road, Bootle	12.62	Former port-related industrial estate, comprising poor quality single storey warehouse and industrial units along with more modern schemes of terraced industrial units. A mix of lower quality historic Port buildings and modern industrial premises. Area is generally well used and prominently located a key route into Liverpool. However, individual areas of dereliction remain, particularly along Pacific Road, which could provide small scale regeneration opportunities.	Critical mass: Good Accessibility: Good Prominence: Good Environment: Poor Total Grade: C	Retain as local employment area for B1, B2, B8 uses. Consider opportunities for remodelling of redundant and underused sites as they emerge

Site	Site Area	Description and Comments	Grading	Recommendations
Orrell Mount/Kingfisher Business Park, Hawthorne Road, Bootle	8.24	Light industrial area, comprising a mix of modern premises to the west (Kingfisher Business Park) and older, larger units to the east (Orrell Mount). Active and successful local industrial estates.	Critical mass: Average Accessibility: Average Prominence: Average Environment: Average Total Grade: C	Retain as local employment area for B1, B2, B8 uses
The Peoples Site, Hawthorne Road, Bootle	7.88	Budget employment area dominated by low density warehousing buildings. As with the adjacent Land adjacent to Acorn Way Employment Area, this is a low quality employment area, in this case dominated by vehicle depots and warehousing. However, again it provides a function serving businesses with budget property requirements. Ongoing monitoring is required to see if the area declines further and begins to see greater dereliction and site vacancy. At that time options for regeneration or redevelopment, as has occurred elsewhere on Hawthorne Road, should be considered.	Critical mass: Poor Accessibility: Average Prominence: Average Environment: Poor Total Grade: D	Retain as local employment area for B1/B8 uses Consider opportunities for regeneration and redevelopment of redundant and underused sites as they emerge.
Port Industrial Area, Bootle	10.05	Within the Port Policy Area bounded by Derby Road, Nelsons Street, Regent Road and Dacre Street. Dominated by poor quality industrial units, but includes a budget hotel and cafes. Budget quality space, but generally well used. Some of the space in the south appears occupied by port related uses, but premises in the north, around Seymour Street, are occupied by a broader range of local businesses. Forms part of a broader corridor of light industrial accommodation which extends much of the length of Derby Road.	Critical mass: Average Accessibility: Good Prominence: Good Environment: Poor Total Grade: C/D	Retain as employment area for B1, B2, B8 uses. However, it is also possible that some of this area will be taken up for use by the Port of Liverpool over the Plan period
Premises off Park Lane West, Netherton	9.63	Small, secondary industrial area containing low grade buildings. Small group, of mostly established businesses occupying the location because of the availability of budget quality space and yard areas. The Dunnings Bridge Road Investment Strategy (2015) identifies several vacant plots here which provide modest infill development options. Land fronting Dunnings Bridge Road is largely dominated by trade uses.	Critical mass: Average Accessibility: Good Prominence: Good Environment: Poor Total Grade: C/D	Retain as key employment area for B1, B2 B8 uses as part of Dunnings Bridge Road Corridor. Consider opportunities for remodelling of redundant and underused sites as they emerge.
Sefton Lane Industrial Estate, Maghull	13.35	Low quality old industrial estate dominated by B8 uses, builders merchants and coach depot.	Critical mass: Average Accessibility: Average Prominence: Poor	Retain as local employment area for B1, B2, B8 uses.

Site	Site Area	Description and Comments	Grading	Recommendations
		Expansion land exists in the south of the estate and was allocated as an employment site in the UDP. However, this constrained backland location has not proved attractive to developers and occupiers and is accordingly not being taken forward in the emerging Local Plan	Environment: Poor Total Grade: C/D	
South Sefton Business Centre, Canal Street, Bootle	16.58	A mix of moderate quality industrial and office buildings, including some yards, adjacent to Bootle Town Centre. Large established industrial area, the quality of premises varies but most properties are of moderate quality. Land is generally well used and the area, which extends into Liverpool, serves the local needs of Bootle.	Critical mass: Average Accessibility: Good Prominence: Average Environment: Average Total Grade: C	Retain as local employment area for B1, B2 uses.
Sub-Total	238.68			
Total	312.03			

Source: BE Group 2015

- 6.58 Of the Employment Areas, only former Philips Factory, Balmoral Drive, Southport (6.00 ha) is suitable for reallocation to other uses in its entirety. This reflects the fact that the main factory complex is fully vacant and moving towards dereliction. It also reflects the unlikelihood that the site, which is in a mostly residential area some distance from the other Employment Areas of North Sefton, can be redeveloped for B1/B2/B8 uses. However, the loss of the 6.00 ha of employment land, which was active at the 31st March 2015 base date of this study, much less at the start of the Plan period (2012) will still need to be accounted for.
- 6.59 In the longer term, the Port Industrial Area, Bootle may move, in part or in its entirety, from B1, B2, and B8 employment to specialist port related uses. This is discussed further in Sections 2.0 and 9.0.

Energy Act 2011

- 6.60 The Council also needs to be aware of the impact the Energy Act 2011 may have on the future letting of Sefton's supply of commercial premises. From April 2018 it will be unlawful to let commercial (and residential) properties with the lowest Energy Performance Certificate (EPC) Ratings (F or G). It is beyond the scope of the study to say exactly what the implications of this will be for Sefton, but it is likely that a range of older properties, particularly in Bootle and the backland sites of Southport may fall into these lower EPC categories. After April 2018, should they become vacant, they cannot be marketed without investment to improve their energy efficiency. However, it should also be noted that funding sources may be available to refurbish premises to the required standard.

Backland Sites

- 6.61 In North Sefton, parts of east Southport and Birkdale have workshops and other informal employment areas on small sites to the rear of housing. These are generally referred to as backland sites. This study has not been asked to review these backland locations but it is accepted that collectively they provide a significant stock of smaller, budget employment premises which sits alongside the more formal supply in North Sefton's identified Employment Areas.
- 6.62 The emerging Local Plan does not have a specific policy on North Sefton's backland sites and does not formally protect them from changes of use. Rather applications for change of use or redevelopment will be dealt with on a case by case basis,

considering site specific circumstances and the likely impacts of the proposed new use.

- 6.63 This appears to be a logical policy reflecting the fact that the North Sefton backland sites are in a diverse range of uses including B1(c) light industry, B8 storage, A1 retail, A3-A5 hot food, D1 and D2 uses as well as Sui Generis motor retail, taxi and vehicle hire. The mix and spread of such uses across the North Sefton backland sites is a complex and changeable affair which would be difficult to categorise and regulate within a borough-wide local plan. It gives these sites the relative freedom to evolve over time to meet changing patterns of demand. It also reflects the reality that many of the smaller sites are unsuited for commercial business uses and could make valuable candidate sites for housing redevelopment, making a small contribution towards meeting future housing need.

Summary

- 6.64 As of 31st March 2015, the baseline local land supply for the study area was 82.10 ha. All of the employment sites proposed are developable and deliverable, even if some of the smaller sites in South Sefton appear to be long term development prospects. For the most part Local Plan sites have already been netted down to exclude any land proposed for non B-Class development. However, an element of enabling development is also likely to be needed at MN2.51: Switch Car Site, Wakefield Road, Netherton and MN2.47(a): former Peerless Refinery, Dunnings Bridge Road, Netherton, to secure development. This study does not wish to prejudice any ongoing or future negotiations by stating what proportion of non B-Class development is required here, however, if an indicative figure of 30 percent was applied it would result in the loss of 3.15 ha of B1/B2/B8 land.
- 6.65 This study measures need back, from 2015, to 2012. This allows consideration of the whole Local Plan period 2012-2030 but does mean that the base date for measuring need (2012) is out of alignment with the base date for measuring supply (2015). To ensure the two align it is appropriate to add back into the supply total completions that have occurred since 2012. Thus the backdated 2012 supply position is **88.59 ha**.
- 6.66 When measured against the forecast growth sectors, Sefton appears to have a good stock of land to meet manufacturing, construction and smaller scale transportation and storage requirements. Sefton's ability to meet forecast growth office based sectors (administrative and support service activities and professional, scientific and

technical activities) appears more limited in South Sefton, where the supply of land is more focused towards industrial options. MN2.47(b): Atlantic Park is likely to remain the primary office location in South Sefton, at least over the short and medium term.

6.67 A review of Sefton's 20 allocated employment areas indicates that most are established office and industrial areas, of moderate quality, which are aimed at meeting local needs and should be protected for that purpose. These are generally graded C to B/C in this study's scoring.

6.68 Sefton's flagship (A or B Grade) locations are:

- Southport Business Park, Town Lane, Southport
- Aintree Racecourse Business Park, Aintree
- Bridle Way Industrial Estate, Netherton
- Deltic Way Industrial Estate, Netherton
- Heysham Road Industrial Estate, Netherton.

6.69 At present, most of the Employment Areas are well occupied, with no large areas of void premises, even in budget quality schemes. However, this study has identified three locations where built quality/site condition is, or may in the future, pose a barrier to the letting/sale of premises or the retention of occupiers. These are:

- Birkdale Industrial Estate
- The People's Site, Bootle
- Land and Premises, Acorn Way, Bootle.

6.70 Of the Employment Areas, only former Philips Factory, Balmoral Drive, Southport is suitable for reallocation to other uses in its entirety. This reflects the fact that the main factory complex is fully vacant and moving towards dereliction. It is also some distance from the primary road network, accessed via residential roads. It also reflects the unlikelihood that the site, which is in a mostly residential area some distance from the other Employment Areas of North Sefton, can be redeveloped for B1/B2/B8 uses. However, the loss of the 6.00 ha of employment land, which was active at the 31st March 2015 base date of this study, much less at the start of the Plan period (2012), will still need to be accounted for.

7.0 LAND NEEDS OF NON-B CLASS USES

Introduction

7.1 Reflecting a wider definition of economic development found in NPPF and PPG guidance this section considers, as far as is possible, future requirements for land from non-B class sectors that are also employment generators. Whilst retailing falls into these sectors this section does not seek to replicate any element of the Sefton Retail Strategy Review, Update (2012) that examines future need.

7.2 For this study the following broad sectors have been identified:

- Retail
- Accommodation and food service activities
- Education
- Human health and social work activities
- Arts, entertainment and recreation.

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

Retail

7.4 As stated above future retailing requirements are separately considered in the Sefton Retail Strategy Review, Update (which we understand is shortly to be updated). The Report suggests that there is need for additional convenience retail floorspace of 6,200 up to 2031 in North Sefton. This is required in Southport and, to a lesser degree in Formby, to address overtrading stores. In South Sefton the convenience requirement is for up to 6,600 sqm to 2031. However, the report suggests that a high proportion of need in the south will be met through the, now complete, development of a Sainsbury's store in Crosby. Improved provision in Kirkby, which forms part of the South Sefton Catchment Area, along with the expansion of existing South Sefton foodstores would also help meet needs.

7.5 In terms of comparison floorspace, the Borough as a whole needs some 31,800 sqm of additional floorspace to 2031. 17,200 sqm (54 percent) of this need is in North Sefton, 14,600 sqm (46 percent) is in the south. However, given the current development pipeline, that need will not begin to accrue until after 2021.

7.6 Several agents, consulted for this study primarily on the office, industrial and warehouse market, also made comments on the local retail market (see Table 41). They clearly suggest that that Southport is the focus of Sefton’s retail market, linked both to local shopping needs as the town’s visitor economy. Demand for units of up to 550 sqm remains fairly constant and there may be some shortfall in larger floorplate shops.

Table 41 – Property Market Comments – Retail

Contact	Comment
National Agent	Most retail opportunities in Sefton tend to be located in the North, more specifically in Southport where the retail industry continues to thrive. Retail units and premises are let/sold within only a few months.
National Agent	Majority of business is completed in Southport, with various retail premises (anything from 20-550 sqm) offered to let at £200-£600 per week. Compared to both industrial and office markets, retail tends to stay fairly constant.
Local Manager	Good retail market – it is really dependent on fluctuations in tourist market (especially, almost exclusively in Southport). Sometimes clients have to look towards Skelmersdale or Burscough for a range of premises in a larger size.

Source BE Group, 2015

7.7 As Section 6.0 notes indicative plans for MN2.49 and MN5: Land South of Formby Industrial Estate include options for food retail and potentially other convenience and comparison options, care will need to be taken to ensure that the scale and nature of such uses satisfy the sequential test and do not detrimentally impact on Formby Town Centre. Land for these uses is excluded from the net land supply figure. Mixed use development at MN2.46 and MN3: Land East of Maghull is also expected to include a local retail centre, again separate from the net B1/B2/B8 employment site. Elsewhere, limited retail options may be considered on MN2.51: Switch Car Site, Wakefield Road, Netherton and MN2.47(a): former Peerless Refinery to form enabling development on these sites. However, no agreements have been reached on this and the sequential test would still need to be considered. Finally, motor retail are an option on part of MN2.50: Southport Business Park.

- 7.8 The three forecast scenarios, discussed in Section 8.0 of this study suggest that the retail and wholesale sector employed some 16,600-17,500 in 2012. Growth of up to 1,400 jobs is predicted to 2035.

Accommodation and Food Service Activities

- 7.9 The sector covers employment generated by hotel, bed and breakfast self-catering accommodation, as well as bars and restaurants. In 2012 the sector employed some 6,400-6,500 (up to 10,200 in the Experian forecasts, which includes additional elements of recreation employment). The three forecasts put forward very different projects of future jobs growth in this sector to 2035, ranging from a loss of 200 jobs in the Oxford Economics Forecasting, 1,500 jobs in Cambridge Econometrics and 2,800 jobs in Experian.
- 7.10 Demand for this sector is generated from both domestic, and to a lesser extent overseas tourism (hotels and restaurants), as well as spend by the Borough's residents (most likely to be restaurants and other catering). Future growth depends on visitor numbers and business activity. In the case of the latter, many business parks now include three or four star hotels as part of their offer of support services for occupiers. Accessibility and prominence are locational factors that will determine where hotels locate. Research for the Dunnings Bridge Road Investment Strategy (2015) suggests that demand for hotels in South Sefton is limited by a glut of recent investment into central Liverpool and reasonable existing provision close to Switch Island. However, modest options for growth may still exist in light of Port growth and Aintree Racecourse. North Sefton has a separate leisure market associated with Southport which may generate hotel requirements.
- 7.11 In terms of food uses plans for MN2.49 and MN5: Land South of Formby Industrial Estate include options for a fast food restaurant. Land for this use is again excluded from the net land supply figure. Mixed use development at MN2.46 and MN3: Land East of Maghull is also expected to include a local retail centre, likely with food options, again separate from the net B1/B2/B8 employment site. Elsewhere, limited food options may be considered on MN2.51: Switch Car Site, Wakefield Road, Netherton and MN2.47(a): former Peerless Refinery to form enabling development on these sites. Again no agreements have been reached on this.
- 7.12 There is a demand for pub restaurants in out of town locations. Prominently located business parks are targeted, and will provide a complimentary function for business

users as well as recreational diners. A typical site will be up to 0.5 ha, and may be grouped with other restaurant uses and roadside uses.

Education

- 7.13 This sector incorporates primary and secondary schools, further education colleges as well as commercial nurseries. In 2012 the sector comprised 9,600-9,900 jobs in the Borough. Forecasts differ considerably on prospects for growth here, with Experian estimating an increase of 1,100 jobs by 2035, while Oxford Economics suggest the sector will lose some 700 jobs over the 2012-2035. Cambridge Econometrics does not give a separate forecast figure for education.
- 7.14 Hugh Baird College, Bootle has plans for growth, including provision of a 'Port Academy Liverpool' programme to prepare youngsters aged 14 and upwards for job opportunities in maritime operations and logistics created by the development of the Port of Liverpool. This will be delivered through the redevelopment of the Pembroke Centre, Balliol Road to create a one-stop-shop for related training including engineering, construction, business, law, ICT, science and advanced manufacturing. Further growth plans, confidential at this time are being put forward on Town Centre sites in and around the current campus. It is not envisaged that College growth will require the loss of any significant areas of land currently in B1/B2/B8 employment use. No significant growth plans have been identified at South Sefton College, Litherland.
- 7.15 In North Sefton, Southport College has had an ongoing programme of refurbishment for several years now, which key achievements including the creation of a specialist School of Media and the Arts. Further refurbishment of the Tony Leigh building commenced in 2014, including the provision of improved restaurant and salon facilities as well as learning spaces for childcare and health and social care students. Further improvements to facilities for Engineering, Motor Vehicle Repair and IT are proposed over the next few years. Again these will primarily be delivered through refurbishment of existing facilities and the take up of any additional land is expected to be negligible.
- 7.16 Growing housing provision in the Borough, including provision of housing on the wider MN2.46 and MN3: East of Maghull site may generate requirements for the expansion of existing schools locally. However, the nature and scale of this extra need will need to be determined through separate research.

Human Health and Social Work Activities

- 7.17 Included within this sector are hospitals, medical centres, GP and dental surgeries, private or specialist healthcare (e.g. physiotherapy), veterinary practices and residential care homes. Forecast growth over the 2012-2035 period is around 2,300 jobs from a 2012 total of 18,000.
- 7.18 Although there will inevitably be changes to local clinics, surgeries, dentists, etc. over the Plan period, no major healthcare facilities are proposed at the moment. Large scale expansion of the Southport and Formby District Hospital is also not proposed at present although ongoing reviews by Clinical Commissioning Groups may change that.
- 7.19 Despite a slowdown in Government spending on health, the increasing numbers and longevity of the elderly population and possible growth in demand for private health care may lead to further provision of residential care homes. This include provision of a care home on land adjacent to MN2.50: Southport Business Park. Nevertheless in general employment sites are inappropriate locations for care homes, due to amenity considerations.
- 7.20 There is evidence elsewhere of veterinary practices, GP and private or specialist healthcare operations being accommodated on employment sites, or through a change of use of existing office buildings. The informal health sector, with its many micro-business practitioners, tends to operate from dwellings, converted retail premises or community buildings. Whilst they can contribute to local job growth, they do not require significant amounts of floorspace.
- 7.21 Consequently it is considered the growth in employment from this sector will be limited in terms of requirements for new space (more probably existing buildings will be occupied through changes of use) and there will be very little requirement for additional land.

Arts Entertainment and Leisure

- 7.22 This sector includes, amongst other activities, forms of commercial leisure such as cinemas, theatres, bowling alleys, bingo halls and nightclubs.

- 7.23 The growth in health awareness has seen an increase in demand for private health clubs and gyms and these are uses that will look to locate on business parks, either through new build or conversion of existing industrial space. Such facilities can range in size from 500 sqm to 2,000 sqm, which could translate to up to 1.5 ha of land with car parking. A comprehensive forecast of this sector is only readily provided by Oxford Economics and Experian and they suggest growth of 600-900 jobs to 2035.

Housing

- 7.24 This study has not been asked to consider housing growth in Sefton, which is the subject of separate research. However, it is important to note that Sefton has historically lost employment land to housing. This has been evident around the Hawthorne Road area of Bootle where low grade land has been redeveloped for residential schemes, some associated with the former Housing Market Renewal Initiative. Off Heysham Road, Netherton the Crown building was also consented for housing in 2012.
- 7.25 Further land losses are likely, although Local Plan policy will seek to minimise any redevelopments in the Primarily Industrial Areas. This is evidenced both by the proposed reallocation of the former Philips Site to housing (discussed in Section 6.0) and representations for housing on land fronting Orrell Lane (Trinity Park), Bootle.

Summary

- 7.26 The non B-Class uses could provide some 8,500 more jobs in Sefton over 2012-2035, but in terms of future land needs for these sectors, the analysis suggests land requirements are likely to be at best modest. This is largely because many will use land already held by the relevant provider, or because the use can be incorporated within mixed-use developments, often town centre based. Some retail, wholesale and hot food provision is proposed in MN2.46 and MN3: Land East of Maghull and MN2.49 and MN5: Land South of Formby Industrial Estate, but this is separate from the net employment land provision. Modest enabling development of this type is also likely on MN2.47(a): former Peerless Refinery and MN2.51: Switch Car Sites although any provision remains subject to negotiation with the Local Planning Authority and appropriate testing.

- 7.27 Excluding the occasional redevelopment of an older factory complex, uses that may be located on employment land, are likely to be limited to gyms, small scale medical and veterinary clinics, and food outlets. These uses are likely to take up no more than 4 ha of allocated employment land over the plan period.
- 7.28 Based on past trends and current demand, further employment land losses to housing are also likely over the Plan period. This is in addition to the loss of the former Philips Factory, Southport which is accounted for in this study (see Section 9.0). It is not possible to define the scope of any losses, particularly in the Primarily industrial Areas where applicants will have to prove exceptional circumstances for residential developments contrary to Local Plan policy to be permitted. However, it is prudent to make some allowance even if the figure can be considered indicative only. A further allowance of 4 ha is therefore assigned to this.

8.0 OBJECTIVELY ASSESSED NEEDS

Introduction

- 8.1 Planning Practice Guidance (PPG) states that the assessment of future land needs should be determined by looking at both past trends and future forecasting methods. This section explains the methodology we have used to take account of the PPG. That methodology uses three models to assess land needs. None provide a definitive answer, but they provide influences to be understood. They must also be considered in light of the market overview undertaken as part of this study. Three models that are commonly used are:
- Historic land take-up forecast
 - Employment based forecast
 - Resident workforce forecast.
- 8.2 After consideration it was ultimately decided not to use the resident workforce forecasts. This is based on BE Group's experience with other Employment Land Reviews which suggests that the population growth figures produced by the econometric forecasters are derived in part from the employment figures and do not provide a meaningful forecast for land. The relevance of the figures produced are more related to evaluating the relationship between economic and housing needs, something Sefton Council is considering separately from this research.
- 8.3 For this study therefore, historic take-up and employment based forecasts have been used, whilst taking account of other indicators including market data and economic growth (Gross Value Added). Forecasts are based on data commissioned for this study from Oxford Economics, Cambridge Econometrics and Experian. As such they represent up to date forecasts that reflect the impact of the recent recession, and the recent improvement of the economy. Where relevant, comparisons have been made to earlier (2012) forecasting commissions for Sefton, and the other Liverpool City Region authority areas, by the Liverpool LEP. However, that forecasting is now three years old and as such its immediate usefulness is relatively limited.
- 8.4 For each model we have commented upon the implications in terms of the volume of land required. Historic take-up is a direct comparison of land developed, whereas forecast data must be translated from jobs numbers to land. This is achieved through estimating the number of employees likely to be employed on a per floorspace basis,

and that floorspace in turn is translated to a rate per ha. Job related densities used equate to those identified in the Homes and Communities Agency and OFFPAT (Office of Project and Programme Advice and Training) Employment Densities Guide 2nd Edition, published in 2010. Floorspace to land ratios are based on our experience of development requirements, and are in line with industry accepted norms.

Model 1: Historic Land Take-Up

- 8.5 Employment land take-up is recorded by the Council. In Table 42 a schedule of completions between 1992 and 2015 is shown. The 69.88 ha of land developed over this period equates to an annual average take-up of 3.04 ha/year. This is not dissimilar from the 3.22 ha/year long term take up figure recorded in the 2012 Employment Land and Premises Study Refresh. It should be noted, however, that Sefton Council has refined and updated its monitoring procedures since 2012 and has recalculated take up rates. Thus the year on year take up figures shown in Table 42 will not necessarily accord with figures for the same years shown in the 2012 Employment Land and Premises Study Refresh. Reflecting the practice of the 2012 study completions primarily for port-related infrastructure, which to not benefit the wider B1/B2/B8 market are excluded from take up calculations.

Table 42 – Sefton Employment Land Take-up 1992-2015

Completion Year	Allocated Sites	Primarily Industrial Areas	Non-PIAs	Total
1992/93	n/k	n/k	n/k	1.50
1993/94	n/k	n/k	n/k	2.80
1994/95	n/k	n/k	n/k	3.10
1995/96	n/k	n/k	n/k	5.70
1996/97	n/k	n/k	n/k	4.90
1997/98	n/k	n/k	n/k	3.80
1998/99	n/k	n/k	n/k	1.43
1999/00	4.87	-	-	4.87
2000/01	2.19	0.00	0.00	2.19
2001/02	0.00	0.00	0.00	0.00
2002/03	0.00	0.42	0.00	0.42
2003/04	0.00	0.00	0.00	0.00
2004/05	1.76	0.00	0.00	1.76
2005/06	4.02	2.83	0.00	6.85

Completion Year	Allocated Sites	Primarily Industrial Areas	Non-PIAs	Total
2006/07	4.44	0.20	0.00	4.64
2007/08	0.00	3.67	0.00	3.67
2008/09	6.89	0.41	0.00	7.31
2009/10	3.20	0.58	1.91	5.69
2010/11	2.24	0.26	0.26	2.76
2011/12	0.00	0.00	0.00	0.00
2012/13	0.00	1.77	0.00	1.77
2013/14	2.93	0.00	0.00	2.93
2014/15	1.48	0.31	0.00	1.79
Total	34.02	10.45	2.17	69.88

Source: Sefton Council, 2015

- 8.6 Total land take-up is categorised between allocated sites, Primarily Industrial Areas and outside of Primarily Industrial Areas from 1999 onwards. Comparable figures are not available for the period before then. As Table 42 shows, 72.9 percent of take up since 1999 has been on allocated sites. A further 22.4 percent of development was on identified Primarily Industrial Areas. Development outside of Sefton's defined sites and areas has been negligible. This is unsurprising as the main source of B-Class development land, outside of the defined sites and Primarily Industrial Areas, Port and Office Quarter is likely to be on backland sites in North Sefton. Evidence is these backland locations see little new development activity annually and most change is likely to be in the form of conversions away from B1/B2/B8 uses.
- 8.7 Across the 23 year period, the trend has been for relatively high take-up rates from 1993 to 2000. This was followed by a sharp drop in development from the turn of the century to 2005. After 2005, Sefton saw a strong improvement in take up to 2011, when the impact of the national recession evidently impacted on completions. Evidence to March 2015 at least suggests that development has yet to return to pre-recession levels.
- 8.8 Although take-up rises and falls in cycles there are no particularly anomalous development years. Thus it is felt appropriate to use the whole monitoring period take-up figure of 3.04 ha/year. Applying it to the Plan period 2012-2030 (18 years), then Sefton requires 54.72 ha of land to 2030, i.e.

$$3.04 \text{ ha/year} \times 18 \text{ (years)} = \mathbf{54.72 \text{ ha}}$$

8.9 Extending the period to 2035 (23 years) increases the need to 69.92 ha, i.e.

$$3.04 \text{ ha/year} \times 23 \text{ (years)} = \mathbf{69.92 \text{ ha}}$$

8.10 The Borough should also have a buffer to reflect a choice of sites by size, quality and location and to provide a continuum of supply beyond the end of the 2035 period. This also makes some allowance for the loss of further employment land to non B-Class uses over the period to 2035. MN2.47(a): Former Peerless Refinery and MN2.51: Switch Car are examples of two sites which may need some B-Class enabling development. There is no set guidance on how long this buffer should be but based on the 2012 supply position, a further six years can be supported. Based on the historic take-up trend this would generate a further land need of 18.24 ha, i.e.

$$3.04 \text{ ha/year} \times 6 \text{ (years)} = \mathbf{18.24 \text{ ha}}$$

8.11 Added to the 2035 need figure, this increases the requirement to 88.16 ha, i.e.

$$69.92 \text{ ha} + 18.24 \text{ ha} = \mathbf{88.16 \text{ ha}}$$

8.12 Overall need of additional land can then be assessed through a comparison of current supply set against these figures.

8.13 At 31st March 2015 there was 82.10 ha of available land in the Borough (Section 6.0), based on net land figures. Backdating for completions over 2012-2015 increases this to 88.59. This suggests that sufficient land is available to meet general needs to 2030 and 2035. To summarise:

- To 2030: 54.72 ha (need) – 88.59 ha (backdated supply) = **33.87 ha remaining**
- To 2035: 69.92 ha (need) – 88.59 ha (backdated supply) = **18.67 ha remaining**

Split by Use Class and Location

8.14 Whilst overall need is important, further analysis can evaluate what the potential needs will be in the different use classes. The Council has been able to split take up data for 1992-2013 by the main employment use classes (B1 (a, b, c), B2, B8). As

Table 43 shows, over the 21 year period, 14.9 percent of take up was for B1(a) offices, 21.1 percent was for B1(c) light industry, 36.3 percent was for B2 general industry and just over a quarter was for B8 storage or distribution. Take up for B1(b) research and development was negligible.

Table 43 – Employment Land Take-Up 1999-2013, by Use Class

Completion Period	Use Class					Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	
1992/93	-	-	-	1.50	-	1.50
1993/94	-	-	2.00	-	0.80	2.80
1994/95	-	-	-	1.80	1.30	3.10
1995/96	-	-	-	4.90	0.80	5.70
1996/97	-	-	-	4.40	0.50	4.90
1997/98	-	-	2.20	-	1.60	3.80
1998/99	-	-	0.30	-	1.13	1.43
1999/00	-	-	2.13	-	2.74	4.87
2000/01	-	-	2.19	-	-	2.19
2001/02	-	-	-	-	-	-
2002/03	-	-	-	-	0.42	0.42
2003/04	-	-	-	-	-	-
2004/05	1.19	-	0.57	-	-	1.76
2005/06	0.87	-	2.15	-	3.83	6.85
2006/07	2.55	-	0.47	1.62	-	4.64
2007/08	-	-	0.92	0.43	2.32	3.67
2008/09	1.85	-	-	5.46	-	7.31
2009/10	3.24	-	0.31	1.29	0.85	5.69
2010/11	-	-	0.48	2.28	-	2.76
2011/12	-	-	-	-	-	-
2012/13	-	-	-	-	1.77	1.77
Total (percent)	9.7 (14.9)	-	13.72 (21.1)	23.68 (36.3)	18.06 (27.7)	65.16 (100.0)

Source: Sefton Council, 2015

- 8.15 Therefore projecting the historic split of land need forward for the periods to 2030 and 2035, Table 44 shows the anticipated need for the different use classes.

Table 44 – Need, Split by Use Class

Period	Use Class (Percentage Split, percent)					Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	

	(14.9)	(-)	(21.1)	(36.3)	(27.7)	
2012-2030	8.15	-	11.54	19.86	15.17	54.72
2012-2035	10.42	-	14.75	25.38	19.37	69.92

Source: BE Group, 2015

- 8.16 Consideration of past take up also suggests that 72.9 percent of future development is likely to be on allocated sites – 39.89 ha of 2012-2030 need, 50.97 ha of 2012-2035 need. 22.4 percent of future development was elsewhere in the Primarily Industrial Areas – 12.26 ha of 2012-2030 need, 15.66 ha of 2012-2035 need. Development outside of Sefton’s defined sites and areas would be negligible, no more than 3.6 ha to 2035.
- 8.17 However, past experience may not be a good guide in this case as Sefton did not previously have the larger proposed Green Belt allocations, at Formby and Maghull, it will have when the Local Plan for Sefton is adopted. These are likely to absorb a reasonable proportion of new development away from the existing Primarily Employment Areas and increasing the proportion of development on allocated sites.

Model 2: Employment Based Forecast

- 8.18 This scenario uses as its base the three econometric forecasts referred to above (Oxford Economics, Cambridge Econometrics and Experian). The forecasts project employment change from 2012 through to 2030 and 2035. The forecasts also include historic annual employment figures for the Borough. Therefore the forecasts can be used to calculate the future need, and review past jobs change. The past jobs data can be used to calculate the assumed land need over a historic period (1992-2012 in the case of this study) for comparison with the historic take-up over the same period.
- 8.19 This first section deals with calculation of future needs.

Jobs

- 8.20 The different forecasts break down employment to the level of between 12 and 19 industry sectors (Table 45). These provide total employment change during the projected time periods, and also allow those jobs relevant to employment land to be identified. It should be noted that for this model the forecasts reflect “policy off”, a non-intervention scenario, in that no account is taken of any planned or emerging investment programmes or strategies in Sefton, including Port growth.
- 8.21 All three baselines indicate that whilst Sefton’s employment has been impacted by

the recent recession, the economy is now starting to grow again. However, different prospects for growth are shown by the three different forecasts (see Table 44).

Table 44 – Jobs Growth Projections

Forecast	2012-2030	2012-2035
Oxford Economics	8,700	8,100
Cambridge Econometrics	13,400	15,400
Experian	11,200	13,700

Source: Experian, Oxford Economics, Cambridge Econometrics, 2015

- 8.22 Oxford Economics are showing the lowest growth with 8,700 to 2030, and then employment is predicted to fall in the following five years to 2035. The highest level of growth is shown by Cambridge Econometrics, with 13,400 jobs forecast to 2030, and a further growth of 2,100 jobs to 2035. Experian also shows a similar pattern over the two periods, but with a more modest growth predicted.
- 8.23 To try and understand the differences in the projected growth, the sectoral split is analysed. The split is based on Standard Industrial Classification coding, and each use a slightly different breakdown, but for comparison purposes the following table shows the three forecasts with some of the sectors combined.

Table 45 – Employment Change by Employee Numbers 2012-2030*

Sector	Oxford Economics	Cambridge Econometrics	Experian
Agriculture, Forestry & Fishing	0	400	200
Accommodation, Food Services and Recreation	(100)	1200	2300
Construction	1500	600	1700
Wholesale and Retail	500	Incl. food Services	1100
Extraction and Mining	0	0	0
Finance and Insurance (incl. Real Estate)	1100	Inc.in Professional	(200)
Information and communication	0	(100)	(200)
Manufacturing	(500)	0	200
Professional, science, technical and other Private Services	3000	5400	4400
Public Services	0	4000	900
Transport and storage	500	1300	900
Utilities	0	0	(100)

Sector	Oxford Economics	Cambridge Econometrics	Experian
Other services/activities	1600	600	-

Source: Experian, Oxford Economics, Cambridge Econometrics, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

Table 46 – Employment Change by Employee Numbers 2012-2035*

Sector	Oxford Economics	Cambridge Econometrics	Experian
Agriculture, Forestry & Fishing	0	300	200
Accommodation, Food Services and Recreation	(200)	1500	2800
Construction	1800	700	2100
Wholesale and Retail	200	Incl. food Services	1400
Extraction and Mining	0	0	0
Finance and Insurance (incl. Real Estate)	1000	Inc.in Professional	(100)
Information and communication	0	(100)	(200)
Manufacturing	(800)	(200)	200
Professional, science, technical and Other Private Services	3200	5800	4800
Public Services	400	5100	1800
Transport and storage	0	1600	1100
Utilities	0	0	0
Other services/activities	1400	700	-

Source: Experian, Oxford Economics, Cambridge Econometrics 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

8.24 The strongest growth sectors in all three forecasts are professional, scientific, technical and other private services, with between 3,200 and 5,400 jobs predicted to 2030, and further growth to 2035. In percentage terms, to 2030, growth in the sector is predicted as follows:

- Oxford Economics – 69 percent
- Cambridge Econometrics – 36 percent
- Experian – 35 percent.

8.25 This growth does reflect national trends and also what is predicted to happen in the region. For Sefton, national market trends suggests that, in time, there may well be a

spin off from businesses in Liverpool City Centre to the wider Liverpool City Region area. In property terms almost all this growth will be in in the B1(a) office sector.

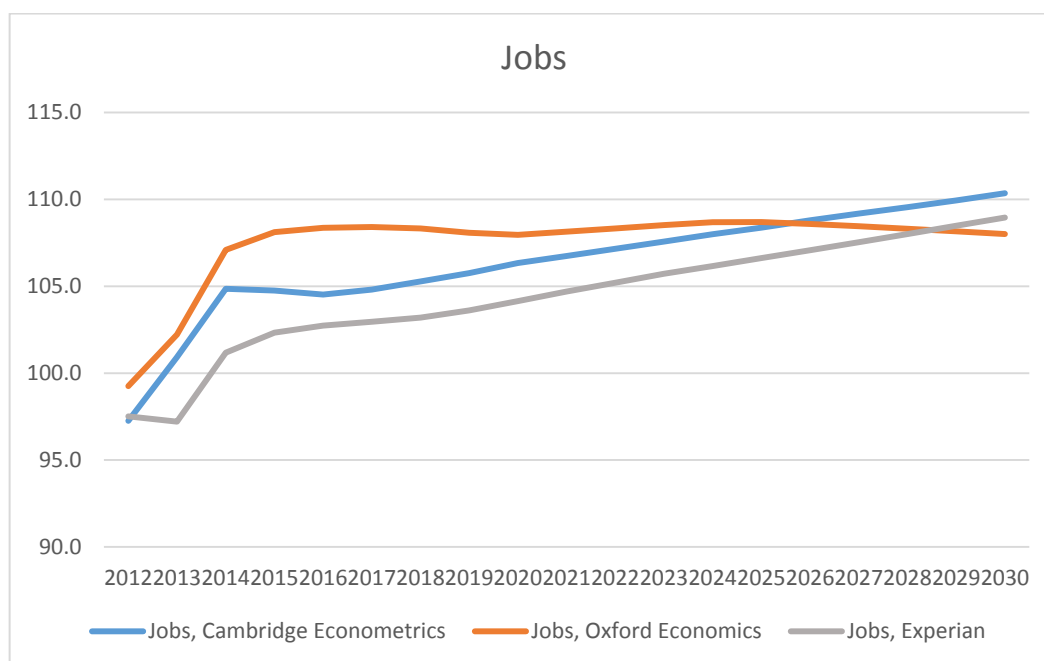
- 8.26 Construction is also projected to see jobs growth, with Oxford Economics and Experian showing a much higher level than Cambridge Econometrics.
- 8.27 Other growth sectors are accommodation and food services together with wholesale and retail. These will have limited impact on employment areas, although, wholesale uses will take up some B8 land. However, the main B8 uses are included in the transport and storage sector. This sector is forecast to grow by between 500 and 1,300 jobs to 2030, increasing to an upper level of 1,600 by 2035 according to Cambridge Econometrics. This is a 27 percent increase over that period, whereas Oxford Economics predict growth to 2030, but with the loss of those jobs in the following five years.
- 8.28 It should be stressed that these figures are a policy off position and thus the impact of the predicted growth at the Port of Liverpool is unlikely to be reflected in any of the figures to any great degree. This is in line with the findings of the earlier business survey, which is summarised in Section 5.0, and which found that the existing local port related companies were not predicting large scale growth of their businesses, both in terms of jobs or property needs.
- 8.29 Manufacturing is considered to be relatively stable over the two periods, with Oxford Economics showing a loss of up to 800 jobs, whereas Experian predicts a drop of 200 jobs, and Cambridge Econometrics no loss at all.
- 8.30 The greatest difference is in public sector jobs, as Cambridge Econometrics predicts an increase of 4,000 employees to 2030 rising to 5,100 in 2035, an increase of 14 percent by the later date. Experian also shows growth but not to the same level. Oxford Economics provides a further breakdown of public sector jobs, and predicts a decline in public administration and education, but growth in health. The growth in health and possibly growth in education may well account for Cambridge Econometrics' high figures, where the statistics are drawn down from regional figures and apportioned. As a result growth that may occur in the cities, such as Liverpool which have large education and health bases, are also reflected in neighbouring centres, and which consequently presents an overly optimistic picture.

GVA

8.31 Growth across the sectors is not measured by jobs growth alone. Change in Gross Added Value (GVA) measures the contribution to the economy of each sector and can show how jobs growth compares with economic growth (see Figures 10 and 11). Whilst all three forecasters show an increase in jobs in the early part of the plan period, growth then flattens. Both Cambridge Econometrics' and Experian, then return to a steady jobs growth, whilst Oxford Economics falls way towards the end of the Plan period. As the figures show, Cambridge Econometrics' is at a higher level than the other forecasters throughout the period.

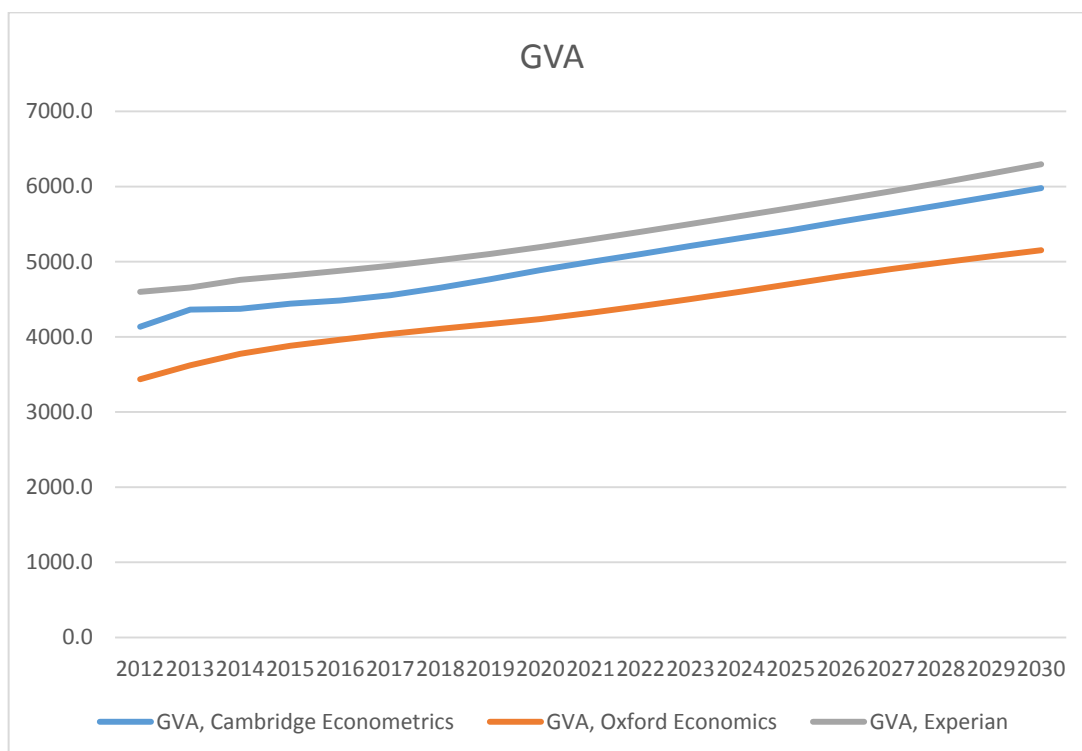
8.32 The GVA graph shows a similar growth from all three forecasts, although each has a different base figure. Significantly, Oxford Economics which forecasts a decline in jobs going forward, does not forecast a fall in productivity, highlighting that a reduction in jobs does not always point to a decline in the industry base.

Figure 10 – Forecast GVA Growth to 2030



Source: Experian, Oxford Economics, Cambridge Econometrics 2015

Figure 11 – Forecast GVA Growth to 2035



Source: Experian, Oxford Economics, Cambridge Econometrics 2015

8.33 The GVA growth should also be considered in terms of percentage growth over the Plan Period (see Table 47). A comparison is also made with the Liverpool LEP forecasts for growth to 2030.

Table 47 – Forecast GVA Growth to 2030, by Percentage

	GVA (Percent increase 2012-2030)	GVA Annual increase
LEP	55.16	3.06
Oxford Economics	49.99	2.78
Cambridge Econometrics	44.70	2.48
Experian	36.70	2.03

Source: Liverpool LEP, Experian, Oxford Economics, Cambridge Econometrics 2012 and 2015

8.34 Again, the three forecasts show a range, with Oxford Economics predicting the greatest percentage growth at 2.78 percent per annum, against 3.06 percent across the whole of the LEP.

Assessing Objectively Assessed Needs

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

- The future mix of activities in respect of office, manufacturing and warehousing employment within different sectors. It is not possible to predict the impact of evolving technical change over the period to 2035, and we have therefore assumed that this mix will not change over the period.
- The percentage of employees in each sector that will translate to floorspace. The proportion of people in each industry sector that occupy B1, B2 or B8 space conforms to those ratios used in other studies and accepted in comparable locations and are sourced from the South East Regional Planning Conference's 'The Use of Business Space'.
- The average space each employee occupies – the employment density. We have assumed no variation in the density rates through to 2030 and 2035, and have used those densities identified in the HCA 2010 published Employment Densities Guide 2nd Edition. Both these density rates are averages, and are now somewhat historic. With changing work practices, the densities will vary, but in the absence of more locally sourced data this industry accepted data is used.
- The average development floorspace per ha for office, manufacturing and warehousing activities. We have applied the uniform amount of 3,900 sqm per ha.

8.36 These assumptions are summarised in Table 48.

Table 48 – Model Assumptions

Industry Sector	Employees		
	Percentage of staff Occupying B1, B2, B8 Floorspace (percent)	Floorspace occupied per person (sqm)	Other Comments
Agriculture	5	12	Managerial, admin, thus B1 office space
Manufacturing	100	47	The density reflects largely B1 light industrial space. The model ratios do allow for higher levels for B2 uses.
Utilities	26	12	Managerial, admin, thus B1 office space
Construction	26	12	Managerial, admin, thus B1 office space
Distribution	48	70	Warehouses, offices- possibly large scale/high bay facilities
Transport	48	70	Warehouses, offices- possibly large scale/high bay facilities
Financial & Business	100	12	B1 offices
Government & Other Services	22	12	Local Government, Public Administration B1 offices

A, 2010

- 8.37 Using the adjustments shown in Table 48, the net job figure for each sector is calculated to reflect the proportion of jobs occupying 'B' floorspace. That figure is then multiplied by the floorspace per person to give total floorspace for each sector. The detailed calculations for this can be found in Appendix 8.
- 8.38 Once a total floorspace is calculated, the figures are then translated to a land requirement using the ratio of 3,900 sqm per hectare. This applies to all use classes. Table 49 show these calculations. Sectors showing jobs growth resulting a positive land requirement are shown separately from jobs reductions

Table 49 – Employment Based Forecast 2012-2030*

Growth Sectors	Oxford Economics	Cambridge Econometrics	Experian
Total Floorspace sqm	92,112	128,352	90,840
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Needed ha	23.63	32.91	23.29

Sectors in Decline	Oxford Economics	Cambridge Econometrics	Experian
Total Floorspace sqm	29,620	1200	5112
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Reduction ha	(7.59)	(0.31)	(1.31)
<i>Net Land Need</i>	<i>16.04</i>	<i>32.60</i>	<i>21.98</i>

Source: BE Group, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

Table 50 – Employment Based Forecast 2012-2035*

Growth Sectors	Oxford Economics	Cambridge Econometrics	Experian
Total Floorspace sqm	90,156	147,208	115,384
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Needed ha	23.12	37.75	29.58

Sectors in Decline	Oxford Economics	Cambridge Econometrics	Experian
Total Floorspace sqm	40,960	10,600	3,600
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Reduction ha	(10.5)	(2.72)	(0.92)
<i>Net Land Need</i>	<i>12.62</i>	<i>35.03</i>	<i>28.66</i>

Source: BE Group, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

- 8.39 When the land needs from both jobs growth and jobs reduction are brought together the net land requirement based on these changes can be calculated.
- 8.40 The range between the different forecasts show a significant variance, with Cambridge Econometrics projecting the highest level of land needs for both periods. Oxford Economics is the lowest for both periods, and the margin between the land to serve the growth sectors and potential reducing need for the declining sectors is greatest for Oxford Economics. This is because Oxford show the greatest job losses in some sectors particularly manufacturing.

8.41 From the sectoral analysis for the three forecasts, it is evident that there are anomalies and differences. To arrive at a firm figure for land need based on jobs, there are a number of ways to evaluate the results. One approach would be to average out the findings, blending both the growth and decline to give a single net land need. Alternatively, the sectors can be adjusted for each forecast where it is considered there are anomalies. A third approach is to assume low growth and high growth to provide a range.

8.42 The simplest approach is the blended approach, which avoids having to make complex assumptions, which may be difficult to support, on the real prospects for change by sector. This is adopted for the purposes of this study:

Table 51 – Sefton Blended Scenario*

	2012-2030	2012-2035
Average growth	26.61	30.15
Average reduction	(3.07)	(4.71)
Blended Scenario	23.54	25.44

Source: BE Group, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

8.43 The blended scenario suggests that there will be a net land requirement of **23.54 ha** to 2030 and a net land requirement of **25.44 ha** to 2035.

8.44 These figures fall significantly below the forecast based on historic take-up.

8.45 In reality the employment change does not translate to land provision in this way. There are a number of factors that will influence the land requirement and it is necessary to understand the market signals to predict a more accurate employment land requirement. These factors include:

- To what extent the growth in office employment takes place in a town centre locations, at higher densities, rather than in low-density business parks. It is more likely to be the latter in view of the Borough's characteristics, which do not include extensive supplies of town centre office schemes. Where growth is predicted in town or city centres different densities would be applied, closer to 100 percent site coverage

- Will the decline in jobs actually lead to the release of land? Past experience suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvement and change. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate and can lead to higher productivity and growth.
- Land take-up/property needs can be for different reasons such as modernisation or geographic relocation, land banking for future needs
- Expansion may also be within existing premises or on expansion land not accounted for in land allocations.

8.46 Therefore, to test how closely jobs change translates to land take-up, historic trends have been compared. Using the same methodology, the land needs based on employment change has been calculated for two historic periods. For this analysis, just Cambridge Econometrics forecasts are used, as subject to minor variances, the historic jobs figures of the three forecasts are similar

- The long term period from 1992-2012 and compared to the actual land take-up during that period
- 2000-2007 which was a period of sustained economic growth nationally.

**Table 52 – Employment Land Take-Up/Employment Change Comparison
1992-2012 (Cambridge Econometrics)***

Employment Change	Total Jobs	Land (Ha)
Growth	4,700	8.17
Decline	(9,000)	90.8
Net growth	(4,300)	(82.63)
Historic land take-up	-	65.16

Source: CE, Sefton Council, BE Group, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

**Table 53 – Employment Land Take-Up/Employment Change Comparison
2000-2007 (Cambridge Econometrics)***

Employment Change	Total Jobs	Land (Ha)
Growth	4,500	17.00
Decline	(10,500)	24.61
Net growth	(6000)	(7.61)
Historic land take-up	-	19.53

Source: CE, Sefton Council, BE Group, 2015

**Figures in brackets are negative, i.e. jobs/property/land losses.*

- 8.47 The two tables show that significant jobs reductions in Sefton during both periods, would have resulted in an overall reduction in land need, what actually happened was that employment land continued to be taken up.
- 8.48 Thus the trend shows that net jobs growth is not an accurate method of calculating land. **Even when land is calculated on the sectors that generate a positive jobs figure over the two periods, there is still a shortfall between the anticipated take-up from a jobs calculation and the actual market take up. This calculation reinforces the view that historic take-up is the most appropriate method.**

Economic Needs and Household Projections

- 8.49 NPPF requires authorities to consider the effect economic growth may have on forecasted household growth. This is to ensure that where there is anticipated jobs growth in an area, the provision of housing is balanced to accommodate those jobs.
- 8.50 This requires a comparison of jobs growth with households. However, it must be stressed that the comparison based on the rationale set out earlier in this section, is not the relationship of land to households. The land needs calculated far exceed the land that would be directly derived from the jobs based forecast, and to try and relocate overall land backwards based on jobs densities will give an inflated figure.
- 8.51 The figures provided in this study have been tested in the SHMA recently produced for Sefton, and housing projections have been based on the jobs projected by Cambridge Econometrics and Experian. The anomalies identified in the Cambridge Econometrics figures, particularly the jobs growth attributed to the public sector to 2030/2035 raises doubts over the accuracy of those figures. Therefore, in translating jobs to households, the Cambridge Econometrics figures were excluded. It should be stressed that this report does not analyse the likely derivative of those future jobs, and whilst the SHMA assumes that the jobs increase will translate to housing numbers, that is not a conclusion of this report.

Summary

- 8.52 The three alternative forecast options have been produced and considered for the periods of 2012-2030 and 2012-2035. The calculations for each are summarised in

Table 54 and show varied outcomes.

Table 54 – Land Forecast Models – Summary

Model	Land Stock adjusted to 2012, ha	Land Need 2012-2030, ha	Surplus (Shortfall), ha	Land Need 2012-2035, ha	Surplus (Shortfall), ha	Assumptions
Historic Land Take-Up Rate/ Adjusted stock	88.59	54.72	33.87	69.92	18.67	Based on ha/year
Employment based on adjusted stock	88.59	23.54	65.05	25.44	63.15	Based on net jobs change for the periods

Source: BE Group 2015

8.53 The surplus in 2030 based on the historic take-up model is the equivalent of a further 11 year supply. If employment based forecasts are taken then there will be an estimated surplus of 65.05 ha to 2030 and 63.15 ha to 2035.

8.54 From the market assessment and also reviewing the historic trends in employment change and land take up, an approach based on jobs only suggests that employment land needs are significantly underestimated. When a comparison of past employment change over the period 1992-2012 is made, actual land take-up is around ten times more than the estimate put forward by the growth only approach. Even in the period of sustained growth the actual take up is more than the figure derived from a jobs based analysis.

8.55 In conclusion, it is considered that the most appropriate forecast to ensure choice for economic growth is historic take-up rate, suggesting a surplus of:

- **33.87 ha to 2030**
- **18.67 ha to 2035.**

8.56 Sefton's need can be split by the main employment use classes – B1 (a, b, c), B2, B8 (see Table 55).

Table 55 – Need, Split by Use Class

Period	Use Class (Percentage Split, percent)					Total (ha)
	B1(a)	B1(b)	B1(c)	B2	B8	

	(14.9)	(-)	(21.1)	(36.3)	(27.7)	
2012-2030	8.15	-	11.54	19.86	15.17	54.72
2012-2035	10.42	-	14.75	25.38	19.37	69.92

Source: BE Group, 2015

9.0 CONCLUSIONS

Introduction

- 9.1 This study has included a wide-ranging look at the factors affecting Sefton's economy, with particular reference to those that are likely to affect the future need for land and property within the Borough. This section draws together the main issues that will need to be addressed as a preliminary to the more detailed recommendations set out in Section 10.0.

Planning Policy Position

- 9.2 The National Planning Policy Framework (NPPF) places a strong emphasis on delivering sustainable development through the planning system. This includes reviewing employment land allocations to ensure supply meets identified objectively assessed needs; proactively supporting sustainable economic development to deliver business and industrial units, and encouraging the effective use of land by reusing brownfield land.
- 9.3 The Government's planning policy approach, recently re-iterated in Planning Practice Guidance, sees responsibility resting with Sefton Council to set employment land requirement figures for the Local Plan. Land targets will be tested through the Local Plan process and the Council therefore needs to collect and use reliable information to justify employment land supply policies. This report provides this information.
- 9.4 The economic role that the planning system must perform incorporates contributing to the building of a strong, responsive and competitive economy, by ensuring sufficient land of the right type is available in the right locations, at the right time, to support growth and innovation.
- 9.5 The NPPF states that 'significant weight' should be placed on the need to support economic growth through the planning system. To help achieve this growth, Local Plans should set criteria, or identify strategic sites, for local and inward investment and to meet anticipated needs over the Local Plan period.
- 9.6 The NPPF also highlights that allocated employment sites for which there is no reasonable prospect of development should not be protected in the long term. Proposals for alternative uses on such sites should be treated on their merits having

regard to market signals and the relative need for different land uses to support sustainable local communities.

Economic Profile

- 9.7 The socio-economic profile of Sefton reveals that over 70.4 percent of the working age population to be in employment, slightly above the North West average of 69.2 percent. Unemployment, at 6.3 percent in winter 2014, was the joint lowest unemployment rate in the Liverpool City Region, alongside Halton. The local unemployment rate was particularly low when compared to the level in Liverpool and St Helens. Unemployment levels in Sefton have reduced significantly since the height of the recession. In September 2011 (the data used in the Employment Land and Premises Study Refresh, 2012), 9.4 percent of the economically active population was unemployed.
- 9.8 The Census figures show that 53 percent of Sefton's employed residents also work in the Borough. This was a fairly average level of self-containment in the Liverpool City Region, well above levels in neighbouring Knowsley but low when compared to Liverpool and Wirral. The Borough is a net exporter of labour, with the main destinations being Liverpool, West Lancashire and Knowsley. As a result, compared to some 28,478 who commute in, some 47,659 commute out of Sefton to work elsewhere.
- 9.9 Despite several years of public spending reductions, public administration, education and health continue to employ a large proportion (41.1 percent) of people in Sefton. This proportion is well above the Liverpool City Region, North West and national averages of 28.6-34.5 percent.
- 9.10 At 5.1 percent, local employment in manufacturing is healthy but actually below wider averages. Across the Liverpool City Region, average employment in this sector is 7.7 percent. Within the general manufacturing sector, some key local sub-sectors include baking, manufacture of plastics products and treatment and coating of metals.
- 9.11 In terms of service sectors, business administration and support services followed by professional, scientific and technical have the strongest roles. However, employment in both was below wider averages. Financial and insurance also has a comparatively strong role in the Borough when compared to wider averages, employing 4.4 percent of workers in 2013, compared to 2.8 percent across the Liverpool City Region, 3.3 percent regionally and 3.8 percent nationally.

- 9.12 In terms of town centre uses, retail accounted for 13.4 percent of jobs compared to wider averages of around 10 percent. Accommodation and food services accounted for 6.4 percent of local employment, broadly in line with wider averages. The indicative evidence is that employment in this sector has decreased, as a proportion of total employment at least, since 2010.
- 9.13 The number of VAT and PAYE registered businesses was 8,375 in 2014. Relative to its population, Sefton has a reasonable number of businesses when compared to the other local authority areas of the Liverpool City Region. In 2014, there were 306 businesses per 10,000 population in the Borough, comparable to rates in Liverpool and Halton, and well above rates in Knowsley. The number of businesses per 10,000 population in Sefton, and in all the other Liverpool City Region local authority areas, is quite low in the regional and national contexts however.
- 9.14 81.1 percent of companies are micro-businesses (less than 10 employees). 96.6 percent employ up to 49 people (small businesses). Homeworking is high compared in the Liverpool City Region context and is only slightly below the North West average. It is a characteristic of the suburban areas of North Sefton.
- 9.15 The current structure of premises in Sefton is strongly industrial. Across the Borough the number of industrial and warehousing units is almost double the number of offices.

Property Market Assessment

Industrial Market

- 9.16 Nationally, market demand has grown steadily over 2013-2015, with no short or medium term prospects of it slowing. Against rising demand the supply of stock continues to decrease. In the North West, as across much of the rest of the country, there is dearth of good quality existing buildings in prime locations across all size parameters.
- 9.17 The later part of 2014 saw a return of speculative development in the 'big box' market for B8 logistics and B2 larger manufacturing, while 2015 appears to be seeing the return of speculative development at the smaller end of the market.

- 9.18 Freehold demand is growing, particularly demand from owner occupiers as improving business confidence encourages firms to expand and review their occupational requirements. With a limited supply of freehold stock available in most locations there is some risk of areas of low stock availability losing businesses to areas of higher availability. However, in reality business relocation decisions will be based on a range of factors (staff availability, proximity of markets and supply chains, etc) and dependant on the nature and operational needs of the company.
- 9.19 In the leasehold market, improving demand is not yet stimulating improvements in rental levels in all locations. In the short term, at least, modest rental growth may continue to act as a break on development prospects for leasehold space, as build costs continue to exceed the likely rates of return.
- 9.20 The local market appears to require industrial units of up to 500 sqm while demand for workshops of less than 200 sqm appears particularly healthy. However, stakeholders generally feel that there are no unpopular sizes and that local tenants can be found for any industrial/warehouse space of between 50 and 5,000 sqm. Demand is for a mix of leasehold and freehold options.
- 9.21 In North Sefton the market operates at a smaller scale, but remains buoyant and anything around 300-500 sqm in size can let quickly, especially standalone units and units located in established industrial locations such as Crowland Street and Slaidburn Crescent or the, presently full, Formby Industrial Estate.
- 9.22 Against this demand there is an undersupply of modern, moderate or good quality premises of up to 1,000 sqm and particularly units of 500-800 sqm. Given current trends, locations in South Sefton with good Port access, would appear to be most desirable although options in North Sefton, catering for local needs and operating at the smaller end of this size range may also be in demand.
- 9.23 Around 81,607 sqm of industrial (and warehouse space) space is currently vacant – 9.4 percent of the total floorspace and only 6.9 percent by premises numbers. This is considered low in average supply terms and points to a lack of availability and choice. Borough-wide the supply of units is reasonable, but options in North Sefton are limited.

Warehouse Market

- 9.24 The short and medium market forecast is that, nationally, improving market conditions and online retail growth will see increased demand for prime logistics space. Demand will remain strong for prime logistics space, with the biggest online retailers continuing to fuel the demand.
- 9.25 Space needs can vary considerably but the average logistics deal is for 23,000 sqm of space on at least 10 ha of land, a scale of requirement that can be challenging to accommodate. Nationally, the availability of sites is constrained and the North West is no exception to this. The region contains several strategic logistics sites, including Omega at Warrington, Skelmersdale and Heywood in Rochdale. However, recent trends have been to break up larger sites with mixed-use consents and developments of smaller B-Class space, reducing the stock of large plots available.
- 9.26 The next few years are likely to see a reverse of that trend as developers seek opportunities to meet increased demand. So far speculative development has concentrated on established logistics locations, but it is expected that activity will move out to secondary locations as demand encourages developers/investors to look at higher risk locations and occupiers seek relief from prime rent rises.
- 9.27 In the North West, growth of the Port of Liverpool will boost demand. The most recent research suggests that Port growth will generate need for 634 ha (net) of logistics and manufacturing land over the next 20 years. Need will be focused on locations within a 1 hour drive time of the Port, so extends far beyond Sefton to include the rest of the Liverpool City Region, West Lancashire, Greater Manchester and Cheshire. With a supply shortfall of some 400-500 ha within that drive time area, this is clearly an issue the Liverpool City Region and most of its neighbouring authorities need to address.
- 9.28 Across the North West, agents are receiving requirements for units of up to 50,000 sqm, which are of relevance to Sefton. Agents for MN2.47(b): Atlantic Park have particularly seen demand for properties of that scale. It should be noted, however, that these are usually requirements from national businesses who may be considering a range of locations in the region.
- 9.29 More locally specific requirements are for production and warehouse space of up to 5,000-10,000 sqm. Businesses specifically looking at Sefton generally want units close to the Port, emphasising the importance of that facility to the Borough.

- 9.30 At the larger scale there are clearly no large logistics units of up to 50,000 sqm in Sefton which could capture national property requirements. Indeed, based on the current marketed supply meeting demand for any single unit of more than 6,000 sqm is challenging, particularly if the demand is for modern space. Premises of more than 2,000 sqm, which might provide warehousing and logistics options are primarily found with the A5036 and A59 Corridor areas of Netherton and Aintree.

Office Market

- 9.31 The recent trend has seen growing demand in in the regional cities, including Manchester, and consequently a reducing stock of Grade A space. Demand has been led by increasing occupier demand and an increasing willingness of investors to look outside of London for opportunities. Occupier demand is private sector led with growth in Telecoms, Media and Technology particularly prominent.
- 9.32 While investment, inward investment and occupier activity will focus on key cities such as Manchester and Liverpool the severe lack of available stock, in particular Grade A stock, is encouraging organisations to look at assets in strong secondary locations. However, this move to the periphery is a slow process and sub-regional centres such as Bootle, St Helens and Waterloo have yet to see much benefit. When, and if, secondary locations benefit in the future will depend on the scale and quality of offer they can provide and their ability to market themselves to national occupiers and investors.
- 9.33 Speculative office development is still the exception and most office development still requires an element of pre-let or government funding to secure a start. However, it is expected that this may change over 2015, at least for schemes in good locations and of desirable sizes, tenures, etc.
- 9.34 A short and medium break on growth is likely to be the significant stock of second hand offices found in many centres. In the short term this stock will actually grow as companies seek to upgrade to better options. A growing market will encourage refurbishments, but it is not clear if increased pressure for office to residential conversions is also likely. In South Sefton, Daniel House in Bootle Town Centre is currently being converted into studios and flats and this could set a precedent for further conversions, although the relatively low house prices in South Sefton are likely to be break on the scale of future change.

- 9.35 Locally, office agents consulted for this study suggest that the office market is still emerging from recession. In Bootle, large suites in the main multi-storey buildings can have quality and specification issues. However, the biggest barrier for lettings is the fact that companies looking for space in the inner Liverpool Conurbation still do not see Bootle Office Quarter as part of their area of search. Lettings of larger office space in Sefton tend to form part of bigger deals for industrial and warehouse facilities. Local demand is for suites of up to 200 sqm and town centre space, particularly in Southport Town Centre, is most popular.
- 9.36 Sefton has a reasonable supply of office accommodation available – 32,193 sqm in 97 suites, which equates to vacancy rates of 10.1 percent by floorspace and 11.3 percent by number of premises. This represents a reasonable supply level although the local offer of larger offices, above 500 sqm in size, is limited.

Stakeholder Engagement

- 9.37 A wide consultation with various stakeholders was conducted as part of the market research, which comprised key employers and landowners and public sector organisations including relevant neighbouring local authorities.
- 9.38 The Liverpool LEP confirmed that the Liverpool City Region Superport: Market Analysis Land and Property Study (2014) remains the most up to date evidence of the additional land needs emerging from port. However, this study does not clarify how that need could be divided between the local authorities of the Liverpool City Region and beyond. It is accepted that further sub-regional research may be required to understand how the need could be realistically split between the different local authority areas.
- 9.39 Consultations with a sample of the larger businesses in the Borough suggest a reasonable desire for further growth within Sefton (see Appendix 3 for details on the needs of individual companies). Five of the 13 businesses have growth aspirations. For the most part these businesses do not envisage there will be any problems in finding the land or premises they need locally. The main exception is within the Port Estate, where space is increasingly constrained given broader growth in Port operations. In the longer term this may have implications for the operations of some Port tenants. In the short term, skills gaps are a more immediate concern.

- 9.40 This reflects the findings of the Port of Liverpool Employment Potential Study (2015) – Business Survey Report, which indicated very high levels of satisfaction in the Borough and its current premises offer. Out of 707 general businesses consulted for this study only 14 businesses indicated an immediate need for additional or new premises. North (and Central) Sefton requirements were primarily office led, whilst in the South the predominance is for industrial uses. Requirements were generally for units 100 sqm or more.
- 9.41 The two Liverpool City Region local authorities which neighbour Sefton, Liverpool and Knowsley, have been consulted, along with West Lancashire.
- 9.42 Most of the local authority areas that neighbour Sefton have additional employment land needs, but indicate they are able to meet these needs through a mixture of existing and proposed additional land allocations. As a consequence they do not expect to have to look to Sefton to meet any shortfalls in employment land or premises supply.
- 9.43 Liverpool City Council is aware of Peel Ports' long term plans for the expansion of the Port of Liverpool. Within the Liverpool local authority area, proposals include the redevelopment of the 8 ha Huskisson Dock Complex and the majority of the Regent Road/Derby Road (L5) Area which is within Liverpool. City Council officers also note that Peel is working to protect docklands sites around Liverpool Waters for dock and related B2/B8 uses.
- 9.44 In Knowsley, Core Strategy sets out a land requirement of 153 ha to 2028. This does not account for any additional land requirements to support Port growth or the resulting projected increase in logistics needs. Rather, in their recent Examination in Public, Knowsley Council successfully argued that it would not be appropriate to delay the adoption of the Core Strategy to allow for the identification and inclusion of additional land allocations for this. Instead the Council intends to consider this issue in the next Local Plan review, likely to commence rapidly after Core Strategy adoption.
- 9.45 Of all Knowsley's proposed strategic allocations, Land South of M62 (former Cronton Colliery) is likely to have some impact on Sefton. This is proposed for large scale logistics and distribution uses and therefore would provide some competition to sites

in Sefton, presently limited to MN2.47(b): Atlantic Park, which may also seek to develop larger warehousing options in support of growing Port-related needs.

- 9.46 In West Lancashire, Skelmersdale is identified as a location which can compete with Sefton for investment from larger B2 and B8 businesses. It is also geographically well placed to meet an element of land needs from the Port growth although West Lancashire District Council concedes that at present, West Lancashire still lacks a sufficient supply of large allocated sites adjacent to, or in close proximity to the M58 corridor to take advantage of the longer-term logistics and warehousing opportunities emerging.

Current Land Availability

Employment Land Supply

- 9.47 Sefton's current potential employment land resource (at 31st March 2015) amounts to 82.10 ha, located across 11 sites. This comprises land proposed under Policy MN2: Housing, Employment, and Mixed Use Allocations of the emerging 'A Local Plan for Sefton: Submission Draft.'
- 9.48 Many of the sites are carried forward from previous UDP Policy, but the emerging Local Plan now includes three large new proposed allocations – MN2.46 and MN3: Land East of Maghull, MN2.48 and MN4: Land North of Formby Industrial Estate and MN2.49 and MN5: Land South of Formby Industrial Estate – which add some 35 ha (net) to Sefton's supply. These new sites are discussed further below.
- 9.49 Forecasting, outlined in Section 9.0, has identified the following growth sectors in Sefton, which could require B-Class employment land:
- Administrative and support service activities.
 - Construction
 - Professional, scientific and technical activities
 - Transportation and storage (not predicted for major growth in forecasting but likely to see expansion due to market factors, including Port Growth).
- 9.50 Manufacturing is not identified as a growth sector but given the Borough's reasonable manufacturing base, and the comments of stakeholders, is expected to remain a significant part of the local economy.

9.51 Table 56 provides an assessment of which of the four main growth sectors, plus manufacturing, could be supported on each of Sefton's 11 employment sites. In practice most of the sites are large enough to support a range of sectors, particularly MN2.50: Southport Business Park and the new proposed allocations. In South Sefton, however, site condition, positioning, market demand and owner intentions generally favour manufacturing and, on larger sites, transportation and storage. The main exception appears to be MN2.47(b): Atlantic Park, where market intelligence suggests that office options are still likely on frontage sites. The prominently located MN2.51: Switch Car Site could also support administrative and support service activities and professional, scientific and technical options, if current site constraints could be overcome.

Table 56 – Supporting Growth Sectors

Site	Growth Sectors				
	Administrative and support service activities	Construction	Professional, scientific and technical activities	Transportation and storage	Manufacturing
North Sefton					
MN2.50: Southport Business Park	*	-	*	*	*
MN2.48 and MN4: Land North of Formby Industrial Estate	*	*	*	*	*
MN2.49 and MN5: Land South of Formby Industrial Estate	-	*	-	*	*
South Sefton					
MN2.46 and MN3: Land East of Maghull	*	*	*	*	*
MN2.47(a): former Peerless Refinery	-	*	-	*	*
MN2.47(b): Atlantic Park	*	-	*	*	*
MN2.47(c): Senate Business Park	-	-	-	*	*

Site	Growth Sectors				
	Administrative and support service activities	Construction	Professional, scientific and technical activities	Transportation and storage	Manufacturing
MN2.51: Switch Car Site	*	*	*	*	*
MN2.52: Land at Farriers Way	-	*	-	-	*
MN2.53: former Lanstar Site	-	*	-	-	*
MN2.54: Linacre Bridge	*	*	*	-	*

Source: BE Group 2015

9.52 Around half the of the Borough's land supply (41.11 ha) could be brought forward within the medium term (3-5 years). The most active sites at present, which have the prospect of being largely completed in three years, are MN2.47(c): Senate Business Park and (subject to an agreement on the mix of uses) the MN2.47(a): former Peerless Refinery, Netherton.

9.53 All of the employment sites proposed are developable and deliverable, even if some of the smaller sites in South Sefton – notably MN2.53: former Lanstar Site, Hawthorne Road, Bootle and MN2.52: Land at Farriers Way, Netherton – appear to be long term development prospects. None are being held for the use of specific businesses and, in principle, all should be able to provide development land within the Local Plan period. With some exceptions, accounted for below, sites have already been netted down to exclude land likely to be developed for non B-Class uses. Thus the realistic employment land supply remains 82.10 ha.

9.54 This study measures need back, from 2015, to 2012. This allows consideration of the whole Local Plan period 2012-2030 but does mean that the base date for measuring need (2012) is out of alignment with the base date for measuring supply (2015). To ensure the two align it is appropriate to add back into the supply total completions that have occurred since 2012, indicating Sefton's land potential at that time. 6.49 ha of land has been taken up in the Borough over 2012-2015 meaning that the 2012 supply position is **88.59 ha**.

Employment Areas

9.55 The Borough's existing 20 Employment Areas have been appraised and graded A-E, as defined in Table 57. Collectively they provide some 312.03 ha of brownfield land in B1/B2/B8 use in Sefton. Around half of this supply (155.11 ha) can be found off Dunnings Bridge Road or at the adjacent Aintree Racecourse Retail and Business Park.

Table 57 – Grades A to E Definitions

Grade	Definition	Action
A	High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area	Protect strongly in the Local Plan Support and expand
B	Good employment sites due to their scale, location and setting. Capable of competing for investment in the sub-regional market place. These are prime sites for marketing to a cross section of users, B1, B2 and B8, including some new inward investors.	Protect strongly in the Local Plan Support and expand
B/C	Key employment sites with an influence over the whole local authority area, but primarily geared towards local businesses and B1 light industrial, B2 and B8 uses.	Protect in the Local Plan Support
C		
C/D	Lower quality locations in residential areas suffering from poor accessibility and massing.	Continue to protect/review through the Local Plan
D		
D/E	Very poor quality areas. Widespread vacancy and dereliction in poor environments. Or areas which have been, or are in the process of being, lost to other uses.	Promote alternative uses if possible
E		

Source: BE Group 2014

9.56 Table 58 summarises the Employment Areas by each of the above grades. It is assumed that future growth will be focused around the five flagship locations (Grade A or B) and indeed the current land supply is focused at MN2.50: Southport Business Park, in North Sefton and to a slightly lesser degree along Dunnings Bridge Road in South Sefton. Areas graded B/C and C generally represent the Borough's supply of B1/B2/B8 premises for meeting local needs. They should be protected for that use. It is not envisaged that large scale growth will take place at these locations, outside of the allocated employment sites.

Table 58 – Employment Areas' Appraisal by Category

Category	Number of Sites	Comments
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Category	Number of Sites	Comments
A and B - Key/Flagship areas	5	<p><i>North Sefton</i></p> <ul style="list-style-type: none"> • Southport Business Park, Town Lane, Southport <p><i>South Sefton</i></p> <ul style="list-style-type: none"> • Aintree Racecourse Business Park, Aintree • Bridle Way Industrial Estate, Netherton • Deltic Way Industrial Estate, Netherton • Heysham Road Industrial Estate, Netherton. <p>The Borough's current 'flagship' locations, the focus for growth proposals and inward investment enquiries.</p>
B/C and C - Fit-for-purpose local Employment Areas	6	Active and established industrial estates/business parks in the area, primarily catering to local business needs.
C/D and D - Lower quality in residential/rural areas	8	Locations which, while viable at present, require ongoing monitoring for further signs of decline, vacancy and dereliction.
D/E and E – Areas of concern, requiring immediate attention or areas lost to other uses	1	Only the former Philips Factory, Balmoral Drive, Southport falls into this category. The main factory complex here is vacant and increasingly derelict. Only one small portion of the site is still occupied.
TOTAL	20	

Source: BE Group, 2015

- 9.57 In the eight lower quality locations, graded C/D and D, there is a need for ongoing monitoring for signs of further decline or increased vacancy. From 2018, this may include the impact of the Energy Act 2011 which prevents the letting of premises which fail to meet minimum energy efficiency standards. If such a decline occurs, plans for regeneration or re-use will need to be considered. The Dunnings Bridge Road Investment Strategy also sets out proposals for regeneration and infill development in the Dunnings Bridge Road Corridor, primarily focused at Heysham Road Industrial Estate.
- 9.58 Of the Employment Areas, only the former Philips Factory, Balmoral Drive, Southport (6.00 ha) is suitable for reallocation to other uses in its entirety. This reflects the fact that the main factory complex is fully vacant and moving towards dereliction. It is also some distance from the primary road network, accessed via residential roads. It also reflects the unlikelihood that the site, which is in a mostly residential area some distance from the other Employment Areas of North Sefton, can be redeveloped for B1/B2/B8 uses. However, the loss of the 6.00 ha of employment land, which was

active at the 31st March 2015 base date of this study, and even more so at the start of the Plan period (2012), will still need to be accounted for.

Future Land Requirements

- 9.59 There is no definitive model for forecasting future employment land needs. Two 'policy off' based models have been used to assess future employment land provision. These are the projection forward of historic land take and a forecast based on employment sector change.
- 9.60 In terms of take-up, data was obtained for the 1992-2015 period. Recalculations on the part of the Council mean that the year on year take up data used here differs in places from that shown in the 2012 Employment Land and Premises Study Refresh.
- 9.61 Using the long term take up trend, the annual average is 3.04 ha/year. Projected forward over 18 and 23 years, from 2012 to 2031 and 2035, the following need is identified:
- To 2030: 3.04 ha/year x 18 (years) = 54.72 ha
 - To 2035: 3.04 ha/year x 23 (years) = 69.92 ha
- 9.62 When measured against supply, which has been backdated to 2012, it is clear that there is sufficient land is available to meet general needs to 2030 and 2035. To summarise:
- To 2030: 54.72 ha (need) – 88.59 ha (backdated supply) = **33.87 ha remaining**
 - To 2035: 69.92 ha (need) – 88.59 ha (backdated supply) = **18.67 ha remaining**
- 9.63 The employment based forecast suggests the following in terms of future employment land provision to 2030 (Table 59).

Table 59 – Employment Based Forecast 2012-2030*

Growth Sectors	Oxford Economics	Cambridge Econometrics	Experian
Total Floorspace sqm	92,112	128,352	90,840
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Needed ha	23.63	32.91	23.29

Sectors in Decline	Oxford	Cambridge	Experian
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	Economics	Econometrics	
Total Floorspace sqm	29,620	1200	5112
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Reduction ha	(7.59)	(0.31)	(1.31)
<i>Net Land Need</i>	<i>16.04</i>	<i>32.60</i>	<i>21.98</i>

Source: BE Group, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

- 9.64 The net results of the three forecasts all suggest that Sefton's land supply (88.59 ha) in more than adequate to meet needs to 2030 and there is no need for any additional employment land provision. The results to 2035 are shown in Table 60.

Table 60 – Employment Based Forecast 2012-2035*

Growth Sectors	Oxford Economics	Cambridge Econometrics	Experian
Total Floorspace sqm	90,156	147,208	115,384
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Needed ha	23.12	37.75	29.58
Sectors in Decline	Oxford Economics	Cambridge Econometrics	Experian
Total Floorspace sqm	40,960	10,600	3,600
Divided by Development Floorspace per ha	3,900	3,900	3,900
Equivalent Employment Land Reduction ha	(10.5)	(2.72)	(0.92)
<i>Net Land Need</i>	<i>12.62</i>	<i>35.03</i>	<i>28.66</i>

Source: BE Group, 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

- 9.65 Due to fluctuations in projected job growth over 2030-2035 the net land needs to 2035 are only slightly increased, and in the case of Oxford Economics slightly less, that for 2030. Thus again there is ample land supply to meet this projected requirement.
- 9.66 The strongest growth sectors in all three forecasts are professional, scientific, technical and other private services, with between 3,000 and 5,400 jobs predicted to 2030, and further growth to 2035. This growth does reflect national trends and also what is predicted to happen in the region. For Sefton, there may well be a spin off

from businesses in the city centres to look to the wider area to locate. In property terms almost all this growth will be in in the B1 office sector.

- 9.67 Construction is also projected to see jobs growth, with Oxford Economics and Experian showing a much higher level than Cambridge Econometrics.
- 9.68 Other growth sectors are accommodation and food services together with wholesale and retail. These will have limited impact on employment areas, although, wholesale uses will take up some B8 land. However, the main B8 uses are included in the transport and storage sector. This sector is forecast to grow by between 500 and 1,300 jobs to 2030, increasing to an upper level of 1,600 by 2035 according to Cambridge Econometrics a 27 percent increase over that period, whereas Oxford Economics predict growth to 2030, but with a decline in those jobs in the following 5 years. Again it should be stressed that this is a disaggregation of national trends and will not reflect the sub-regionally specific issue of Port growth and its impact of future logistics needs.
- 9.69 From the sectoral analysis for the three forecasts, it is evident that there are anomalies and differences. To arrive at a firm figure for land need based on jobs, there are a number of ways to evaluate the results. One approach would be to average out the findings, blending both the growth and decline to give a single net land need. Alternatively, the sectors can be adjusted for each forecast where it is considered there are anomalies. A third approach is to assume low growth and high growth to provide a range.
- 9.70 To arrive at a single figure for land need the blended approach is adopted for the purposes of this study (see Table 61).

Table 61 – Average Land Forecast Scenario*

	2012-2030	2012-2035
Average growth	26.61	30.15
Average reduction	(3.07)	(4.71)
Blended Scenario	23.54	25.44

Source: BE Group, 2015

**Figures in brackets are negative, i.e. jobs/land losses.*

9.71 The blended scenario suggests that there will be a net land requirement of **23.54 ha** to 2030 and a net land requirement of **25.44 ha** to 2035. Meeting this requirement would only require 28.7 percent of Sefton’s land supply of 88.59 ha.

9.72 However the employment methods of forecasting make no allowance for issues such as the extent that growth in office employment takes place in a town centre locations, at higher densities, rather than in low-density business parks. Also that land take-up/property needs can be for different reasons such as modernisation or geographic relocation or that expansion may also be within existing premises or on expansion land not accounted for in land allocations. Past experience also suggests that even where businesses are contracting, they will continue to hold onto sites in anticipation of future improvements. Also, where jobs are being lost to automation, those new automated processes will still require land on which to operate, and improved productivity could lead to additional need.

9.73 It is therefore considered that the land requirements’ calculations can represent a false position. To test how closely jobs change translates to land take-up, historic trends have been compared. Using the same methodology, the land needs based on employment change has been calculated for two historic periods (see Tables 62 and 63). For this analysis, just Cambridge Econometrics forecasts are used, as subject to minor variances, the historic jobs figures are similar:

- The long term period from 1992-2012 and compared to the actual land take-up during that period
- 2000-2007 which was a period of sustained economic growth nationally.

**Table 62 – Employment Land Take-Up/Employment Change Comparison
1992-2012 (Cambridge Econometrics)***

Employment Change	Total Jobs	Land (Ha)
Growth	4,700	8.17
Decline	(9,000)	(90.8)
Net growth	(4,300)	(82.63)
Historic land take-up	-	86.62

Source: CE, Sefton Council, BE Group, 2015

*Figures in brackets are negative, i.e. jobs/land losses.

**Table 63 – Employment Land Take-Up/Employment Change Comparison
2000-2007 (Cambridge Econometrics)***

Employment Change	Total Jobs	Land (Ha)
Growth	4,500	17.00
Decline	(10,500)	(24.61)
Net growth	(6000)	(7.61)
Historic land take-up	-	31.52

Source: CE, Sefton Council, BE Group, 2015

*Figures in brackets are negative, i.e. jobs/land losses.

- 9.74 The two tables show that significant jobs reductions in Sefton during both periods, would have resulted in an overall reduction in land need, what actually happened was that employment land continued to be taken up. The trend shows that net jobs growth is not an accurate method of calculating land with some four times the amount of land being developed against the land calculated from the jobs prediction.
- 9.75 A summary of the take up and blended forecast scenarios is set out in Table 64. They relate to the periods 2012-2030 and 2012-2035.

Table 64 – Land Forecast Models – Summary

Model	Land Stock adjusted to 2012, ha	Land Need 2012-2030, ha	Surplus (Shortfall), ha	Land Need 2012-2035, ha	Surplus (Shortfall), ha	Assumptions
Historic Land Take-Up Rate/ Adjusted stock	88.59	54.72	33.87	69.92	18.67	Based on ha/year
Employment based on adjusted stock	88.59	23.54	65.05	25.44	63.15	Based on net jobs change for the periods

Source: BE Group 2015

- 9.76 The variation in the outcome figures demonstrates the uncertainty of forecasting. All show a surplus, but that surplus ranges 18.67 ha to 65.05 ha. However, from the market assessment and also reviewing the historic trends in employment change and land take up, the conclusion is that the employment based forecasts underestimate land needs significantly. When a comparison of past employment changeover the period 1992-2012 is made, actual land take-up is around four times the estimate that

the growth only sectors suggest. Applying this ratio to future needs brings the estimated land requirement much closer.

- 9.77 In conclusion, it is considered that the most appropriate forecast is the long term historic take-up rate based on the stock adjusted to 2012, suggesting a surplus of 33.87 ha to 2030 and 18.67 ha to 2035.
- 9.78 Sefton’s previous take up can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 65 applies the same proportionate split to Sefton’s projected needs, to 2030 and 2035.

Table 65 – Need, Split by Use Class

Period	Use Class (Percentage Split, percent)					Total (ha)
	B1(a) (14.9)	B1(b) (-)	B1(c) (21.1)	B2 (36.3)	B8 (27.7)	
2012-2030	8.15	-	11.54	19.86	15.17	54.72
2012-2035	10.42	-	14.75	25.38	19.37	69.92

Source: BE Group, 2015

- 9.79 As Table 65 shows, over the 21 year period, 14.9 percent of take up was for B1(a) offices, 21.1 percent was for B1(c) light industry, 36.3 percent was for B2 general industry and just over a quarter was for B8 storage or distribution. Take up for B1(b) research and development was negligible.
- 9.80 Consideration of past take up also suggests that 72.9 percent of future development is likely to be on allocated sites – 39.89 ha of 2012-2030 need, 50.97 ha of 2012-2035 need. 22.4 percent of future development was elsewhere in the Primarily Industrial Areas – 12.26 ha of 2012-2030 need, 15.66 ha of 2012-2035 need. Development outside of Sefton’s defined sites and areas would be negligible, no more than 3.6 ha to 2035.
- 9.81 However, past experience may not be a good guide in this case as Sefton did not previously have the larger Green Belt allocations, at Formby and Maghull, which are proposed in the Local Plan. These are likely to absorb a reasonable proportion of

new development away from the existing Primarily Employment Areas and increase the proportion of development on allocated sites.

Other Land Needs

- 9.82 The quantitative land requirement, obtained from a consideration of the land take-up and employment forecasts is only half the story. This study has also undertaken a broad based appraisal of the Borough's property market consulting with property agents, developers, large local businesses and a range of other public and private organisations. This analysis has identified other sources of land need beyond that identified above, which also need to be accounted for.

Former Philips Factory, Southport

- 9.83 As mentioned, this study accepts that the former Philips Factory, Southport (6.00 ha) is no longer viable as an employment location and can be reallocated to other uses. However, the loss of this sizable area of land, which was in active use at the study base date (even if much of the site is now vacant), still needs to be accounted for.

Additional Land Need – 6.00 ha.

The Needs of Non-B Class Uses

- 9.84 Forecasting suggests that relevant non B-Class uses (Retail; accommodation and food service activities; education; human health and social work activities; arts, entertainment and recreation) could provide some 8,800 more jobs in Sefton by 2035. Consultation suggests there are no large scale development proposals in the medical sector at present, while future growth at the Borough's Colleges will primarily be contained within the existing campuses. New schools, medical centres, local retail centres will be provided in the wider MN2.46 and MN3: East of Maghull site. However, here masterplanning will ensure that any development is separate from the employment land proposed (although there will be some overlap of B1 and non B-Class in the local centres proposed). Likewise mixed use developments have already been separated within MN2.49 and MN5: Land South of Formby Industrial Estate to provide a net figure for B1/B2/B8 development.
- 9.85 It is likely that some modest, non B-Class, enabling development will be required on the MN2.47(a): former Peerless Refinery and MN2.51: Switch Car Sites, although no agreements have been reached on this. Elsewhere some land may be lost to non B-Class uses that may locate on active employment land – gyms, small scale medical

and veterinary clinics, and food outlets. This is particularly likely in employment land and premises outside of the designated Primarily Industrial Areas, which will not receive formal protection under the emerging Local Plan. A modest further allowance needs to be made to account for this and a further need of 4 ha is put forward.

- 9.86 Based on past trends and current demand, further employment land losses to housing are also likely over the Plan period. This is in addition to the loss of the former Philips Factory, Southport which is accounted for above. It is not possible to define the scope of any losses, particularly in the Primarily industrial Areas where applicants will have to prove exceptional circumstances for residential developments contrary to Local Plan policy to be permitted. However, it is prudent to make some allowance even if the figure can be considered indicative only. A further allowance of 4 ha is therefore assigned to this.

Additional Land Need – 8 ha.

Port Growth

- 9.87 As was noted in the 2012 Employment Land and Premises Study Refresh, Port land requirements at Regent Road/Derby Road have the potential to displace a number of local businesses, creating an additional land requirement for Sefton. Research, undertaken by the Council, suggests that 13.16 ha of land at Regent Road/Derby Road are occupied by non-port related businesses which may need to be relocated. Based on the availability of land and premises in surrounding areas of Sefton and Liverpool, it is assumed that 20 percent of the affected businesses will seek alternative premises within Sefton. This gives an estimated additional land requirement of 2.63 ha. It should be noted however, that this figure is currently under review and may reduce due to the recent listing of some of the buildings in the affected area.

Additional Land Need – 2.63 ha (provisionally)

- 9.88 Table 66 measures the impact of these deductions on the surplus shown in Table 65 above, measured against historic take-up, over 2012-2030. As shown, a surplus of **17.24 ha** remains to 2030. To 2035, the surplus reduces to **2.04 ha**.

Table 66 – Trend Based Forecast of Land Take-up – Deductions Adjusted*

Current land surplus 2012-2030 (Historic Take-Up Rate from Table 65, less land supply), ha	Further Deductions, ha	Adjusted Figure, ha
33.87	<p>(6.00) Accounting for the loss of the former Philips Factory, Southport</p> <p>(8.00) Indicative figure accounting for likely further land losses to non-B Class development, including enabling development on employment sites and (modest) losses to housing</p> <p>(2.63) Additional land needs resulting from the displacement of businesses, from Regent Road/Derby Road, due to Port expansion</p>	17.24

Source: BE Group 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

9.89 Thus it is possible to conclude that Sefton can meet its local land needs over the Local Plan Period 2012-2030 and also account for land losses, to other uses, which may occur over the Plan period. Needs to 2035 can also be met without further allocations, i.e. a five year buffer after 2030 can be provided for. However, meeting all the needs will require the full range of allocations proposed in the Submission Draft Local Plan, including the Green Belt sites and there is limited scope for land losses, apart from some of the enabling options allowed for.

9.90 This study has not considered there further needs which could be generated from Port growth. The latest research (2014) suggests that requirements could extend to some 400-500 ha of additional land need across the Liverpool City Region and beyond. However, no research has yet been undertaken to clarify how that need could be broken down on a local authority basis. Providing that clarification will need to be a research priority for the Liverpool City Region authorities, LEP and its neighbours over the next few years.

New Employment Allocations

9.91 The Local Plan proposes three large new land allocations – the 20.00 MN2.46 and MN3: Land East of Maghull site, Land North of Formby Industrial Estate (MN2.48 and

MN4 – 8 ha) and Land South of Formby Industrial Estate (MN2.49 and MN5 – 7 ha). These three locations are considered in more detail.

MN2.46 and MN3: Land East of Maghull

- 9.92 The current linear employment site, as proposed in the indicative masterplans, would provide a buffer between the housing and the M58, supports envisaged infrastructure arrangements and reflects land ownership patterns.
- 9.93 It is capable of meeting a range of smaller business requirements. This study has found reasonable demand for primarily industrial and warehouse units of up to 500 sqm to meet local needs. Against this demand there is an undersupply of modern, moderate or good quality premises of up to 1,000 sqm and particularly units of 500-800 sqm. 20 ha of land would be a considerable resource of land to meet such requirements, capable of accommodating all of the likely growth sectors, and have the advantage of direct motorway access. However, careful marketing and phasing of this site would be required, given similar proposals for small business premises developments at Formby and around Dunning's Bridge Road, to ensure that Sefton was not oversupplied with any element of space at any point during the Plan period. Thus this remains a second preference for the use of this site.
- 9.94 However, the current linear development site would also be less suited to meeting major logistics requirements, which could form a core element of premises demand here. A more 'square' shape would maximise its ability to support one or more 'big box' logistics sheds and be divided into large plots. The main access road should run along the edge of the employment site, rather to maximise the size of the plots which could be delivered or possibly allow the whole site to be developed for a single occupier.
- 9.95 As an initial approach, it is therefore recommended that a masterplan layout options be coordinated to provide a mix of flexible accommodation of B1(a), B1(c), B2 and B8 uses, or B8 in isolation which would meet with the specific demand of individual or multiples occupiers. If MN2.46 and MN3: Land East of Maghull is taken forward, in the current configuration, as a (likely) primarily small business scheme it is suggested that further demand research is required to determine if local and sub-regional demand can support this scale of provision, at this location.

MN2.48 and MN4: Land North of Formby Industrial Estate

- 9.96 Current masterplanning suggests that 38,833 sqm of space can be delivered here in a mixed B1/B2/B8 development which would include office, trade and hybrid uses. Barriers to development here include flood risk and ecological issues, along with the need to agree site access. However, the view is that all three issues can be successfully mitigated through design.
- 9.97 No formal marketing has commenced here, however, evidence of demand comes from developer interest in the opportunity and the fact that the existing Formby Industrial Estate is fully occupied. The scheme is likely to deliver smaller office space early in the Plan period, which can meet the needs of the two key growth sectors – administrative and support service activities and professional, scientific and technical activities. The site, along with land to the south, will also be a useful source of smaller industrial/warehouse space in North Sefton, reflecting the fact that much of the existing stock locally is aging and of budget quality.

MN2.49 and MN5: Land South of Formby Industrial Estate

- 9.98 Proposals are advancing more rapidly here than in the north, evidenced by the fact that St Modwen has now been secured to develop the site. Constraints here are similar to those in the northern site. The scale and nature of the non B-Class enabling development also has to be agreed, with reference to likely impact on Formby Town Centre. Plans for an enhanced Sports Centre on the site, providing replacement facilities for Formby Football Club are well advanced with delivery likely shortly after Plan adoption.
- 9.99 Formal marketing has not commenced here. However, site owners and agents report receiving a healthy number of informal enquiries for land and premises from local firms. Demand appears to be for B1(c) light industrial uses and B8 trade uses.
- 9.100 The offer proposed for MN2.48 and MN4: Land to the North of Formby Industrial Estate is similar to that in MN2.49 and MN5: Land to the South of Formby Industrial Estate. Both are proposing strong elements of B1(c) light industry and B8 trade units. In particular, both are proposing plots for larger B2/B8 units of 1,000 sqm or more. If, as appears likely, larger plots at both locations are offered on a Design and Build basis to established firms then it is likely that both sites will be competing to attract potential occupiers from the limited pool of companies who would want a new build unit in North Sefton.

9.101 Despite this, initial demand evidence, in the form of informal enquiries in the south and developer interest in the north, does suggest that sufficient market requirements exist to support both sites. Delivery of space on MN2.49 and MN5: Land to the South of Formby Industrial Estate is also expected to occur in a shorter timeframe than land in the north. Such a staggered approach to new development around Formby should be encouraged by the Council minimise the risk that the two sites deliver similar property elements at the same time, although it is accepted that longer term marketing of design and build plots will occur on both sites, with resulting competition for occupiers.

9.102 Indicative job creation figures for the three sites are provided in Table 67, summarising findings in Section 6.0 and in Appendix 4.

Table 67 – Indicative Job Creation Figures for the New Employment Sites*

Site	Jobs by Use Class					Total	Comments
	B1(a)	B1(b)	B1(c)	B2	B8		
MN2.46 and MN3: Land East of Maghull							
Option A: Land developed for two 23,000 sqm B8 units (46,000 sqm)	-	-	-	-	575	575	Reflects current average logistics requirements on a realigned site
Option B: Land developed for single 78,000 sqm B8 unit	-	-	-	-	975	975	Reflects the largest solus logistics development possible on a realigned site
Option C: Business Park development	1,950	-	414	542	279	3,185	Indicative jobs generation from a mixed business park.
MN2.48 and MN4: Land North of Formby Industrial Estate							
Option A: If larger plots are delivered for 100 percent B2 uses at 1 job per 36 sqm	530	-	192	581	52	1,355	Based on the indicative site masterplan
Option B: If larger plots are delivered for 100 percent B8 uses at 1 job per 70 sqm	530	-	192	-	351	1,073	
Option C: If larger plots are delivered for 50 percent B2/50 percent B8	530	-	192	290	201	1,213	
MN2.49 and MN5: Land South of Formby Industrial Estate							
Option A: If larger plots are delivered for 100 percent B2 uses at 1 job per 36 sqm	-	-	145	379	98	622	Assumes maximum use of the 7 ha net site for B-Class uses, some
Option B: If larger plots are delivered for 100 percent B8	-	-	145	-	293	438	

Site	Jobs by Use Class					Total	Comments
	B1(a)	B1(b)	B1(c)	B2	B8		
uses at 1 job per 70 sqm							27,300 sqm at 3,900 sqm/hectare. This is above what has been put forward in site research to date.
Option C: If larger plots are delivered for 50 percent B2/50 percent B8	-	-	145	190	196	531	

Source: BE Group, 2015

*Employment in B-Class premises only. Based on HCA (2010) average employment densities.

10.0 RECOMMENDATIONS

Introduction

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

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

Employment Land Supply

Recommendation 1 – Employment Land Provision Definition

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

10.3 For the purpose of this study the current available land supply in Sefton is defined as the 11 sites put forward in Policy MN2: Housing, Employment, and Mixed Use Allocations of the emerging ‘A Local Plan for Sefton: Submission Draft.’ These total 82.10 ha and are identified in Section 6.0 Table 40. Employment land site proformas for the 11 sites are included within Appendix 4.

10.4 For the purposes of consistency between need and supply, from 2012, the three years take up 2012-2015 (6.49 ha) is included in supply calculations. However, this backdated land does not comprise land still available or proposed for allocation in the Local Plan.

Recommendation 2 – Employment Sites and Areas to be Retained

10.5 Existing sites and premises provide valuable opportunities for employment close to where people live. They benefit the local economy, and the loss of employment uses can negatively impact on local access to jobs and the economic competitiveness of local areas. Ultimately this challenges the Borough’s economic growth.

10.6 The emerging Local Plan identifies 19 'Primarily Industrial Areas' in Policy ED3 for protection for B1/B2/B8 uses. Other uses will only be permitted where they:

- *“Are small scale or ancillary to the above uses, or*
- *Maximise job outputs and are compatible with the character and function of the area and with adjacent uses.”*

10.7 This study agrees with this policy and suggests that special consideration be given to the five key/flagship locations, graded A or B in the Employment Areas analysis (Section 6.0), which are identified of being of a scale or of exceptional economic value (i.e. of being of sub-regional/regional value, rather than local value) that aligns to the NPPF 'key employment sites' designation:

North Sefton

- Southport Business Park, Town Lane, Southport.

South Sefton

- Aintree Racecourse Business Park, Aintree
- Bridle Way Industrial Estate, Netherton
- Deltic Way Industrial Estate, Netherton
- Heysham Road Industrial Estate, Netherton.

10.8 Within these areas, only applications for B class use should generally be permitted. Non-B Class uses should only be allowed if an applicant can demonstrate exceptional circumstances and that the proposals will not have a significant adverse impact on surrounding local uses. It is accepted that some exceptions may have to be made on land fronting Dunnings Bridge Road to ensure the viable development of employment sites and possibly regeneration options around Heysham Road Industrial Estate. Such development should however not prejudice the efficient and effective uses of the remainder of the employment area.

10.9 Retail uses should not generally be supported on employment areas unless justified by exceptional circumstances and they can be robustly justified in viability terms. Where alternative uses are considered, the general priority should be linked uses such as car showrooms, tyre and exhaust centres, or trade counters, providing the employment areas have good access to a range of sustainable transport options.

10.10 Where non-B Class uses are proposed for, or within, such areas then the Council should require the applicants to demonstrate that:

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

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

10.12 **In the eight lower quality locations, graded C/D and D, there is a need for ongoing monitoring for signs of further decline or increased vacancy.** From 2018, this may include the impact of the Energy Act 2011 which prevents the letting of premises which fail to meet minimum energy efficiency standards. The Council should therefore consider if a stock condition survey is required, of older premises on the Primarily Industrial Areas at least, to determine if energy efficiency, amongst other factors, is likely to be a barrier to the ongoing use and marketing of property.

10.13 If such a decline occurs, plans for regeneration or re-use will need to be considered. While the broad priority should be to retain employment land in B1/B2/B8 use it is recognised that some flexibility may be justified to help facilitate a broad range of economic development, which is vital for the future sustainability and development of the local area's economy.

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

on their individual merits, including employment outputs, but should normally be restricted to the Employment Areas graded B/C to D. This study has estimated that some 3 ha of land, currently in B1/B2/B8 use, will be lost to such non-B use employment over the Plan period.

- 10.15 The 20th Employment Area, considered in this study, the **former Philips Factory, Balmoral Drive, Southport (6.00 ha) is suitable for reallocation to other uses in its entirety. This reflects the fact that the main factory complex is fully vacant and moving towards dereliction. It also reflects the unlikelihood that the site, which is in a mostly residential area some distance from the other Employment Areas of North Sefton and the primary road network, can be redeveloped for B1/B2/B8 uses.** As the site is largely vacant, its full redevelopment would only require the relocation of one occupier (DPI). Its loss would therefore have little impact on Sefton's supply of employment land
- 10.16 This advice is offered without consideration of other planning, traffic/highways issues, etc. which might render some uses or mixed use developments inappropriate on particular employment areas. It is clearly for Sefton Council to judge proposals on their merits taking account of these factors.

Recommendation 3 – Future Employment Land Provision

- 10.17 The identified land supply of 82.10 ha, at 31st March 2015, plus a backdated 2012 supply of 6.49 ha, is sufficient to meet needs over the period 2012-2030. It is also sufficient to meet needs to 2035, while providing further land to account for likely land losses over the Plan period (discussed below).
- 10.18 The forecasts of industry sector activity (jobs), suggest even greater land surpluses exist, in the order of 65.05 ha to 2030 and 63.15 ha to 2035.
- 10.19 However, BE Group does not recommend that the economic forecasts be the basis for defining employment land provision up to 2030 and 2035. This is because the forecasts represent the absolute minimum amount of land required to accommodate the activities of different industry sectors. Other issues include:
- That within sectors expected to decline (particularly manufacturing) there will still be businesses that will grow and expand
 - That there will be local market churn

- That there will be need to maintain a choice of supply by size, type, location and quality of sites and premises for businesses at differing levels of their maturity
- That there should be a continuing forward supply to accommodate site development beyond 2035
- The level and nature of the existing employment land supply at 31st March 2015.

10.20 **It is therefore recommended that Sefton Council use the roll forward of historic take-up as the main measure of Sefton’s future land needs for the period up to 2030 and 2035 (see Table 68). This indicates a need of 54.72 ha to 2030 and 69.92 ha to 2035 (i.e. a five year buffer beyond 2030).**

10.21 **Measured against the Borough’s current supply, and allowing for completions over 2012-2015, the Sefton Local Plan provides sufficient land to meet its needs over the 2012-2030 period.**

Table 68 – Land Forecast Models – Summary

Model	Land Stock adjusted to 2012, ha	Land Need 2012-2030, ha	Surplus (Shortfall), ha	Land Need 2012-2035, ha	Surplus (Shortfall), ha	Assumptions
Historic Land Take-Up Rate/ Adjusted stock	88.59	54.72	33.87	69.92	18.67	Based on ha/year
Employment based on adjusted stock	88.59	23.54	65.05	25.44	63.15	Based on net jobs change for the periods

Source: BE Group 2015

10.22 However, the Local Plan period is also likely to see employment land losses to other uses including non-B Class enabling development on some sites; the loss of the former Philips Factory, Southport to housing; some further housing losses and potentially land lost to Port growth. This study has endeavoured to account for these losses even if some of the figures applied should be treated as indicative only.

10.23 Table 69 measures the impact of these deductions on the surplus shown in Table 68 above, measured against historic take-up, over 2012-2030. As shown, a surplus of **17.24 ha** remains to 2030. To 2035, the surplus reduces to **2.04 ha**.

Table 66 – Trend Based Forecast of Land Take-up – Deductions Adjusted*

Current land surplus 2012-2030 (Historic Take-Up Rate from Table 65, less land supply), ha	Further Deductions, ha	Adjusted Figure, ha
33.87	<p>(6.00) Accounting for the loss of the former Philips Factory, Southport</p> <p>(8.00) Indicative figure accounting for likely further land losses to non-B Class development, including enabling development on employment sites and (modest) losses to housing</p> <p>(2.63) Additional land needs resulting from the displacement of businesses, from Regent Road/Derby Road, due to Port expansion</p>	17.24

Source: BE Group 2015

*Figures in brackets are negative, i.e. jobs/property/land losses.

10.24 Allowing for these deductions, Sefton still has sufficient land for the 2012-2030 Plan period while providing a further five years supply to 2035. However, meeting all the needs will require the full range of allocations proposed in the Submission Draft Local Plan, including the Green Belt sites and there is limited scope for land losses, apart from some of the enabling options allowed for.

10.25 It is therefore recommended that Sefton Council seek to retain and protect all employment sites currently proposed in the Submission Draft Local Plan, including the main Green Belt sites which are a core component of supply for B1/B2/B8 uses. Further losses to other uses should be discouraged, except where clearly identified as essential enabling development.

10.26 The land supply, as envisaged in the Local Plan appears capable of providing plots and premises for all of the growth sectors identified in forecasting. Office space is deliverable at MN2.50: Southport Business Park, MN2.48 and MN4: Land North of Formby Industrial Estate, MN2.46 and MN3: Land East of Maghull, MN2.47(b):

Atlantic Park and (potentially) MN2.51: Switch Car Site which could accommodate administrative and support service and professional, scientific and technical activities. Most sites could support construction uses, although this is best suited on locations away from main road frontage that could provide at least some budget premises and yard space. Manufacturing could be accommodated on all the sites.

10.27 Transportation and storage could be accommodated on most of the sites, reflecting the fact that most land is prominently located off the M58, A5096 Dunnings Bridge Road Corridor and A565 Formby Bypass. It cannot be accommodated on some of the smaller sites in Bootle however. In addition, only MN2.47(b): Atlantic Park and, subject to some reconfiguring, MN2.46 and MN3: Land East of Maghull, could accommodate larger logistics operations which have an average requirement of 23,000 sqm on 10 ha.

10.28 Sefton's previous take up can be split by the main employment use classes – B1(a, b, c), B2, B8. Table 68 applies the same proportionate split to Sefton's projected needs, to 2030 and 2035.

Table 68 – Need, Split by Use Class

Period	Use Class (Percentage Split, percent)					Total (ha)
	B1(a) (14.9)	B1(b) (-)	B1(c) (21.1)	B2 (36.3)	B8 (27.7)	
2012-2030	8.15	-	11.54	19.86	15.17	54.72
2012-2035	10.42	-	14.75	25.38	19.37	69.92

Source: BE Group, 2015

10.29 Thus, if new land provision is tailored to fit past development, 14.9 percent of take up should be for B1(a) offices, 21.1 percent for B1(c) light industry, 36.3 percent for B2 general industry and just over a quarter was for B8 storage or distribution. B1(b) uses will likely be included within wider schemes of premises

10.30 However, in reality modern companies frequently require a mix of office, industrial and storage space, tailored to their individual needs. The full range of needs which may emerge cannot be predicted in advance and indeed the requirements of companies change as they grow. Demand from different sectors will also fluctuate over the lifetime of the Local Plan. Thus policy should avoid proscriptions on what B-Class uses can or cannot locate on employment sites, unless there are specific

environmental reasons for excluding some uses, such as the proximity of land to housing.

10.31 Experience of past take up suggests that the overwhelming majority of Sefton's need will be for plots on allocated employment sites or within defined Employment Areas. Need outside these locations is expected to be negligible.

10.32 In terms of the new allocations of the emerging Local Plan, Table 69 makes a number of recommendations.

Table 69 – Recommendations for Emerging Allocations

Proposed Allocation	Comment
<p>MN2.46 and MN3: Land East of Maghull</p>	<p>As Sefton's only employment site with direct motorway access, this land will clearly be most desirable to occupiers for whom strategic road access is essential. This may include larger manufacturing companies but is particularly likely to favour B8 logistics operations.</p> <p>However, the current linear development site would also be less suited to meeting major logistics requirements, which could form a core element of premises demand here. A more 'square' shape would maximise its ability to support one or more 'big box' logistics sheds and be divided into large plots. The main access road should run along the edge of the employment site, rather to maximise the size of the plots which could be delivered or possibly allow the whole site to be developed for a single occupier.</p> <p>As an initial approach, it is therefore recommended that masterplan layout options be coordinated to provide a mix of flexible accommodation of B1(a), B1(c), B2 and B8 uses, or B8 in isolation which would meet with the specific demand of individual or multiples occupiers. If however, MN2.46 and MN3: Land East of Maghull is taken forward, in the current configuration, as a primarily small to mid-sized business scheme it is suggested that further demand research is required to determine if local and sub-regional demand can support this scale of provision, at this location.</p> <p>The Local Plan requires that serviced plots should be made available on 25 percent of the business park before the 500th house is completed. Changes are to this policy are being discussed. The agreed revisions will be recommended as a Modification when the Local Plan is examined. However, there will be a need to secure provision of the employment element in a legal agreement (Section 106 or equivalent) that will require actions, at key points, from the current development partners.</p> <p>As an important first step the development partnership should be encouraged to tender for a developer to deliver the employment element in the short term. While the Council, which is not a landowner, cannot directly undertake this exercise it can support the marketing and decision making associated with this.</p> <p>To remove an element of uncertainty it is suggested the Council prepare, in partnership with other stakeholders, a masterplan or Supplementary Planning Document (SPD), for the site, incorporating decisions made on the above points. This should be something all parties are encouraged to sign up to, providing a plan for delivery.</p>
<p>MN2.48 and MN4: Land to the North of</p>	<p>Proposals here appear to be proceeding at a pace without the need for public sector intervention.</p> <p>The main site constraints are assumed to be flood risk and highways access,</p>

Proposed Allocation	Comment
Formby Industrial Estate MN2.49 and MN5: Land to the South of Formby Industrial Estate	<p>although a design option has already been put forward for the northern site to address flooding. As early as possible the Council and the development partners should negotiate and agree a statement of approach on how these two issues can be addressed. This should be a position all parties are comfortable in defending against any subsequent objections.</p> <p>The above could form part of a wider Development Brief for the two sites. In addition to relevant design and planning issues the Brief should look at issues of phasing to ensure that, as much as possible, the two sites are not delivering similar property elements at the same time and seek to complement rather than compete with each other.</p>

Source: BE Group, 2015

Recommendation 4 – Future Reviews

10.33 Whilst BE Group does not recommend the allocation of a further quantum of land beyond that proposed in the emerging Local Plan, proposals for the Borough’s new land allocations are evolving. In addition, conditions in Sefton’s lower graded Employment Areas will require ongoing monitoring over the Local Plan period, taking account of changing EU Standards and the impact of the Energy Act 2011 (discussed in Section 6.0). In view of these factors Sefton should review its employment land portfolio at intervals of around three years. This is also broadly in accordance with the NPPF which recommends regular monitoring and review of the local land supply to ensure a robust evidence base.

Recommendation 5 – Maintain Awareness of External Influences

10.34 As a first point, Sefton Council must recognise its role, together with the other Liverpool City Region authorities, in developing the sub region’s economy. In this respect they are interconnected, to varying degrees, on a number of levels. Because of its location Sefton also has a similar relationship with West Lancashire.

10.35 This study has not considered there further needs which could be generated from Port growth. The latest research (2014) suggests that requirements could extend to some 400-500 ha of additional land need across the Liverpool City Region and beyond into Greater Manchester, Cheshire and Lancashire. However, no research has yet been undertaken to clarify how that need could be broken down on a local authority basis and it is understood that the bulk of the need will only come forward in the medium and long term. In a recent Examination in Public for the Knowsley Core Strategy, it was accepted by the Inspector that that it would not be appropriate to delay the adoption of the Core Strategy to allow for the identification and inclusion of additional land allocations for this.

10.36 However, there remains a need to clarify, how the needs emerging from a growing Port will affect all of the local authorities of the Liverpool City Region and how wider land requirements can be realistically divided up. **Thus as a short-medium priority it is recommended that the Council participate in a wider Port and logistics needs study, incorporating all of the affected local authorities and the Liverpool LEP.**

Appendix 1 – List of Consultees

Anthony Hill
Bardon Aggregates
Barton Wilmore
Bestway Wholesale
CBRE
Cockwill & Co
Countryside Properties
David Halsall Removals
Dowhigh
DPP Planning
Edward Symmons
Fitton Estates
Formby Play Sports
Freight Logistics
Fujitsu
GL Hearn
Hallam Land Management
Hansteen
Hitchcock and Wright
HOW Planning
Jameson Consult
Keppie Massie
Knight Frank
Knowsley Metropolitan Borough Council
Liverpool City Council
Liverpool City Region Local Enterprise Partnership
Maritime Transport
Mason and Partners
Mason Owen
Nathaniel Lichfield Partners
Oriel Studios Digital
P&O Ferries
Persimmon
Robert Pinkus
Santander
Savills
Sefton Metropolitan Borough Council
St Modwen
Sutton Kersh
Taylor Wimpy
West Lancashire Borough Council
WHR Property
Worthington Owen
WPA

Appendix 2 – Sefton Vacant Property Schedules

Introduction

This appendix details vacant premises in Sefton, available at the time of the Employment Land and Premises Study Update. The tables below provide the full schedules of available industrial and office premises respectively, in Sefton. These schedules are split into the core market areas of North and South Sefton.

Table A2.1 – Schedule of Industrial Premises – North Sefton

North Sefton - Industrial				
Property	Settlement	Tenure	Quality	Size, Sqm
47a-49a Guildford Road	Southport	Freehold	Moderate	1,800
12 Forest Road	Southport	Freehold	Moderate	877
Unit 5, Crowland Close	Southport	Leasehold	Moderate	552
Unit 2, Crowland Street/Foul Lane	Southport	Leasehold	Moderate	355
Unit 1, Portland Street Trading Estate, 14 Portland Street	Southport	Leasehold	Moderate	314
Unit 3, 55 Crowland Street	Southport	Leasehold	Moderate	310
Garage, 140 Norwood Road	Southport	Leasehold	Good	267
Unit 17, Dalweb Industrial Park	Southport	Leasehold	Moderate	190
Unit 1, Old Hall Farm Business Park, Crowland Street	Southport	Leasehold	Good	182
91a King Street	Southport	Leasehold	Moderate	169
Unit 6, Kensington Industrial Park, Hall Street	Southport	Leasehold	Good	116
Unit 13, Kensington Industrial Park, Hall Street	Southport	Leasehold	Good	116
Unit 14, Kensington Industrial Park, Hall Street	Southport	Leasehold	Good	116
Unit 15, Kensington Industrial Park, Hall Street	Southport	Leasehold	Good	116
Unit 10, Enterprise Business Park, Russell Road	Southport	Leasehold	Good	104
Unit 4, Kensington Industrial Park, Hall Street	Southport	Leasehold	Good	93
Unit 2, Portland Street Trading Estate, 14 Portland Street	Southport	Leasehold	Moderate	78
1-7 Bridge Grove	Southport	Freehold	Budget	60
Unit 4, Portland Street Trading Estate, 14 Portland Street	Southport	Leasehold	Moderate	52

North Sefton - Industrial				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit 3, Portland Street Trading Estate, 14 Portland Street	Southport	Leasehold	Moderate	51
Unit 5, Portland Street Trading Estate, 14 Portland Street	Southport	Leasehold	Moderate	51

Source: BE Group, 2015

Table A2.2 – Schedule of Industrial Premises – South Sefton

South Sefton - Industrial				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit A, Big Ft2, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Moderate	8,431
Dunnings Park, North West Training Council, Dunnings Bridge Road	Netherton	Freehold	Moderate	6,133
Seymour Street	Bootle	Leasehold	Moderate	5,000
9 Dunnings Bridge Road	Netherton	Leasehold	Moderate	3,873
Roadside Industrial Facility, Dunnings Bridge Road	Netherton	Either	Moderate	3,873
Unit V6, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	3,840
Units A/B, Dunnings Bridge Road	Netherton	Leasehold	Moderate	3,031
Unit 2, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	2,001
Unit 1, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	1,970
Building A, Brasenose Industrial Estate	Bootle	Leasehold	Moderate	1,907
Unit V3, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	1,551
Unit 3, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	1,534
Unit 7, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	1,350
Unit 8, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	1,350
Unit 9, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	1,350
Unit 10, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	1,350
Building B, Brasenose Industrial Estate	Bootle	Leasehold	Moderate	1,195

South Sefton - Industrial				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit B, Big Ft2, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Moderate	929
Unit 1, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	893
Unit V5, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	879
Unit 1a-1b, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	869
Unit B, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	846
2 Dacre Street	Bootle	Either	Moderate	842
Building C, Brasenose Industrial Estate	Bootle	Leasehold	Moderate	807
Unit 18, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	795
Unit A, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	790
Unit 20, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	737
Former Sorting Office, The Strand	Bootle	Either	Budget	614
Unit 12, Brookfield Business Park, Muir Road	Netherton	Either	Moderate	563
Unit 17, Vesty Business Park, Bridle Road	Netherton	Leasehold	Good	560
Unit 2, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	501
100 Liverpool Road North	Maghull	Leasehold	Moderate	491
120 Derby Road	Bootle	Leasehold	Moderate	489
Units 4&5 Brookfield Court, Brookfield Drive	Netherton	Leasehold	Moderate	472
Unit A, 114 Derby Road	Bootle	Leasehold	Moderate	418
Unit B, 114 Derby Road	Bootle	Leasehold	Moderate	418
Building E, Brasenose Industrial Estate	Bootle	Leasehold	Moderate	415
Unit 1, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	381
Unit 23, Brookfield Business Park, Brookfield Drive	Netherton	Either	Moderate	378
Unit 4, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	373

South Sefton - Industrial				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit E, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	372
Unit 4b, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	372
4a Bechers Drive	Aintree	Leasehold	Moderate	369
Washington Parade	Bootle	Leasehold	Moderate	351
Unit 7, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	340
Unit 5, Brookfield Trade Centre	Aintree	Leasehold	Moderate	338
Unit 3, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	334
Unit 4, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	334
Unit 5, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	334
Unit 6, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	334
Industrial Unit, The Bridgewater Complex, Canal Street	Bootle	Leasehold	Good	329
Unit 6a, Vesty Business Park, Bridle Road	Netherton	Leasehold	Good	328
Unit 5, Brasenose Industrial Estate, Lipton Close	Bootle	Leasehold	Good	316
Unit 8, Brasenose Industrial Estate, Lipton Close	Bootle	Leasehold	Good	316
Unit 7, Brasenose Industrial Estate, Lipton Close	Bootle	Leasehold	Good	313
Unit 6, Brasenose Industrial Estate, Lipton Close	Bootle	Leasehold	Good	312
Unit 117, Brookfield Drive	Aintree	Leasehold	Moderate	271
Unit 49, Brasenose Industrial Estate	Bootle	Leasehold	Budget	266
Building D, Brasenose Industrial Estate	Bootle	Leasehold	Budget	263
Unit 1k, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	249
Unit 6, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	247
Unit 3, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	242

South Sefton - Industrial				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit 9, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	242
Unit 15, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	241
Unit 18, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	232
Unit 5, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	232
Unit 11, Brookfield Business Park, Brookfield Drive	Aintree	Leasehold	Moderate	224
Light Unit, Sefton Business Park, Olympic Way	Netherton	Either	Moderate	193
Unit 17, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	190
Unit C, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	185
Unit D, Brookfield Business Park, Brookfield Drive	Netherton	Leasehold	Moderate	185
Unit 5, Maritime Enterprise Park, Rimrose Road	Bootle	Leasehold	Moderate	181
Unit 11, Bechers Business Park	Netherton	Leasehold	Budget	149
Unit 2, The Boxworks, Heysham Road	Netherton	Either	Moderate	142
Unit 3, The Boxworks, Heysham Road	Netherton	Either	Moderate	142
Unit 1, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	112
Unit 3, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Good	111
Unit 4, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Good	111
Unit 9, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Good	111
Unit 10, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Good	111
Unit 9, The Boxworks, Heysham Road	Netherton	Leasehold	Moderate	107
Unit 16, The Boxworks, Heysham Road	Netherton	Leasehold	Moderate	107
Unit 5, The Boxworks, Heysham Road	Netherton	Leasehold	Moderate	104
Unit 6, The Boxworks, Heysham Road	Netherton	Leasehold	Moderate	102
Unit 20, Farriers Way Industrial Estate, Farriers Way	Netherton	Leasehold	Moderate	93

South Sefton - Industrial				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit 22, Farriers Way Industrial Estate, Farriers Way	Netherton	Leasehold	Moderate	92
Unit 44, Farriers Way Industrial Estate, Farriers Way	Netherton	Leasehold	Moderate	92
Unit 46, Farriers Way Industrial Estate, Farriers Way	Netherton	Leasehold	Moderate	92
Unit 48, Farriers Way Industrial Estate, Farriers Way	Netherton	Leasehold	Moderate	92
Unit 28, Farriers Way Industrial Estate, Farriers Way	Netherton	Leasehold	Moderate	91
Unit 22, The Boxworks, Heysham Road	Netherton	Leasehold	Moderate	82
Unit 34, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Good	74
Unit 6, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	74
Unit 7, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	56
Unit 8, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	56
Unit 12, Millers Bridge Industrial Estate, Seymour Street	Bootle	Leasehold	Moderate	56
Unit 6, Farriers Way Industrial Estate, Farriers Way	Netherton	Leasehold	Moderate	45

Source: BE Group, 2015

Table A2.3 – Schedule of Office Premises – North Sefton

North Sefton - Office				
Property	Settlement	Tenure	Quality	Size, Sqm
Floors 1&2, 377 Lord Street	Southport	Leasehold	Moderate	3,690
Building A, Southport Business Park	Southport	Either	Good	2,487
5-7 Duke Street	Southport	Either	Moderate	1,358
6A/B Halsall Lane	Formby	Leasehold	Budget	687
6a/6b, The Cloisters Shopping Centre	Formby	Leasehold	Moderate	687
27-29 Hoghton Street	Southport	Leasehold	Moderate	390

North Sefton - Office				
Property	Settlement	Tenure	Quality	Size, Sqm
Unit 2, Crowland Street Commerce Park	Southport	Leasehold	Good	335
Joel House, 43 Hoghton Street	Southport	Freehold	Moderate	323
54 Bath Street	Southport	Freehold	Moderate	322
4 Rosehill & 116 Kensington Road,	Southport	Freehold	Moderate	236
Clare House, 166 Lord Street	Southport	Leasehold	Moderate	228
215-219 Lord Street	Southport	Leasehold	Good	227
52 Bath Street	Southport	Freehold	Moderate	195
53 Hoghton Street	Southport	Leasehold	Moderate	161
157a Hampton Road	Southport	Freehold	Budget	103
Suite 20, Fourth Floor, Shakespeare Centre, Shakespeare Street	Southport	Leasehold	Moderate	118
53-55 Shakespeare Street	Southport	Leasehold	Moderate	102
First Floor, 14-16 Hoghton Street	Southport	Either	Moderate	101
Second Floor, Queen Anne House, East Bank Street	Southport	Leasehold	Moderate	93
First Floor, 139-141 Cambridge Road	Southport	Leasehold	Moderate	65
Ground Floor, 139-141 Cambridge Road	Southport	Leasehold	Moderate	63
Office 4, Westminster Chambers, 106 Lord Street	Southport	Leasehold	Moderate	57
Units 17-19, Eldon Court, 39-41 Hoghton Street	Southport	Leasehold	Moderate	44
Unit 6 The Gallery, Furness Avenue	Formby	Leasehold	Good	44
Suite 58, 58-62 Ranelagh Drive	Southport	Leasehold	Moderate	39
Suite 60, 58-62 Ranelagh Drive	Southport	Leasehold	Moderate	39
Suite 5, Victoria Court, London Street	Southport	Leasehold	Moderate	33
Unit 4, The Gallery, Furness Avenue	Formby	Leasehold	Good	32
Unit 7, The Gallery, Furness Avenue	Formby	Leasehold	Good	32
Suite 1, Victoria Court, London Street	Southport	Leasehold	Moderate	27
Suite 62, 58-62 Ranelagh Drive	Southport	Leasehold	Moderate	24

North Sefton - Office				
Property	Settlement	Tenure	Quality	Size, Sqm
Suite 6, Victoria Court, London Street	Southport	Leasehold	Moderate	22
Suite 3, Victoria Court, London Street	Southport	Leasehold	Moderate	17
Suite 4, Victoria Court, London Street	Southport	Leasehold	Moderate	17
Suite 2, Victoria Court, London Street	Southport	Leasehold	Moderate	16

Source: BE Group, 2015

Table A2.4 – Schedule of Office Premises – South Sefton

South Sefton - Office				
Property	Settlement	Tenure	Quality	Size, Sqm
St. Hugh's, Stanley Road	Bootle	Leasehold	Good	4,459
Office 1, Caspian House, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Good	1,718
Office 2, Caspian House, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Good	1,532
First Floor, Alaska House, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Good	922
Second Floor, Alaska House, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Good	922
Ground Floor, Alaska House, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Good	758
Units 4&5, Bechers House, Charnock Road	Aintree	Leasehold	Moderate	506
Units 2&3, Bechers House, Charnock Road	Aintree	Leasehold	Moderate	470
1 Molyneux Way, Bleasdale Business Centre	Aintree	Leasehold	Moderate	376
Unit 2, Berry Street	Bootle	Freehold	Moderate	371
West Suite, Eighth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	358
East Suite, Tenth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	358
West Suite, Twelfth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	358
Suite 4B, Alaska House, Atlantic Park, Dunnings Bridge Road	Netherton	Leasehold	Moderate	272
Suite A, The Triad Building	Bootle	Leasehold	Moderate	261
Suite C, The Triad Building	Bootle	Leasehold	Moderate	261
Suite B, The Triad Building	Bootle	Leasehold	Moderate	257

South Sefton - Office				
Property	Settlement	Tenure	Quality	Size, Sqm
Suite A, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	236
East Suite, First Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Second Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Third Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Fourth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Seventh Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Eighth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Ninth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
West Suite, Tenth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Eleventh Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	208
East Suite, Sixth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	203
First Floor, The Triad Building	Bootle	Leasehold	Moderate	203
100 South Road	Crosby	Leasehold	Moderate	190
East Suite, Fifth Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	185
South Suite, Second Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	182
North Suite, Second Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	181
South Suite, Third Floor, St. Martin's House, Stanley Road	Bootle	Leasehold	Moderate	181
12 Molyneux Way, Bleasdale Business Centre	Aintree	Leasehold	Moderate	171
Suite C, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	158
Suite C, Second Floor, Sefton House, Bridle Road	Netherton	Leasehold	Moderate	157
Suite D, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Moderate	149
First Floor Suite, Telegraph House, Moor Lane	Crosby	Leasehold	Moderate	148
Suite 2, Sefton House, Bridle Road	Netherton	Leasehold	Moderate	148

South Sefton - Office				
Property	Settlement	Tenure	Quality	Size, Sqm
Suite B, First Floor, Sefton House, Bridle Road	Netherton	Leasehold	Moderate	134
Suite B, Second Floor, Sefton House, Bridle Road	Netherton	Leasehold	Moderate	132
Unit 10, Berry Street	Bootle	Freehold	Moderate	128
Suite 2, First Floor, 12-14 Moor Lane	Crosby	Leasehold	Moderate	109
Ground Floor, 10-12 Northway	Maghull	Leasehold	Moderate	99
First Floor, 10-12 Northway	Maghull	Leasehold	Moderate	98
Suite D, Second Floor, Sefton House, Bridle Road	Netherton	Leasehold	Moderate	87
29 Liverpool Road North	Maghull	Leasehold	Moderate	75
Suite A, Second Floor, Sefton House, Bridle Road	Netherton	Leasehold	Moderate	70
Suite 1, Sefton House, Bridle Road	Netherton	Leasehold	Moderate	70
Suite 2, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	39
Suite 3, First Floor, 12-14 Moor Lane	Crosby	Leasehold	Moderate	34
Suite 17, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	30
Second Floor Suite, Telegraph House, Moor Lane	Crosby	Leasehold	Moderate	28
Suite 12, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	17
Suite 4, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	16
Suite 8, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	16
Office 1, Space Solutions Business Centre, 39 Sefton Lane Industrial Estate	Maghull	Leasehold	Moderate	16
Office 2, Space Solutions Business Centre, 39 Sefton Lane Industrial Estate	Maghull	Leasehold	Moderate	16
Suite 13, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	14
Suite 14, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	14
Suite 16, Aintree Racecourse Business and Retail Park	Aintree	Leasehold	Good	14

Source: BE Group, 2015

Appendix 3 – Key Business Consultations

A3.1 One to one consultations have taken place with 13 businesses located in Sefton. Many are regional, national or international businesses, with facilities in the study area being part of a wider network of research and development, production, service and logistics operations.

A3.2 For the most part these update contacts made with these companies for the Port Of Liverpool Employment Potential Study (2015).

Bestway Wholesale

A3.3 Bestway opened its store on Heysham Road in October 2010, one of 64 in the UK. The store comprises 2,000 sqm of space, and serves Bootle, Aintree and St Helens. Trade is some 200-300 customers a week, which is average for a Bestway store. The location attracts strong competition from nearby branches of Aldi and B&M Bargains.

A3.4 Bestway purchased its land at the Former Peerless Refinery for approximately £7 million. Originally it sought land on the Dunnings Bridge Road frontage which is seen as a strong retail/trade location in South Sefton. However, prime frontage land would have cost an extra £1 million, which Bestway felt was excessive.

A3.5 Bestway would wish to see the remainder of the Former Peerless Refinery site developed quickly. At present the vacant land is a source of vermin and presents a security issue. Bestway did not express any concerns about how this land could be developed, i.e. for industrial, office or associated retail and leisure uses.

Dowhigh

A3.6 Dowhigh are highways contractors, working mostly for local authorities in the City Region, including Sefton, Liverpool and St Helens. They employ 50 directly (plus 100 sub-contractors) from their owner occupied premises of some 500 sqm off Park Lane West, Netherton. The company also operates a small recycling facility off Hawthorne Road, Bootle.

A3.7 Dowhigh reports that it is satisfied with this location which provides them with good strategic access to the rest of the sub-region. Indeed the company has a requirement for more space in the Park Lane West area. It requires some 0.8 ha of additional land to consolidate uses presently operating from Hawthorne Road, Bootle. It has

approached several local landowners, but these have proved unwilling to sell. As an alternative, Dowhigh would look at buying land off Heysham Road if it was available.

- A3.8 Dowhigh also made the point that despite appearances, Heysham Road is well occupied, mostly with bad neighbour uses. The company is concerned that if this area was redeveloped there are no viable alternative locations where those bad neighbour occupiers could go.

Fujitsu

- A3.9 Fujitsu employs 100 at its Farriers Way site (Comben House), which provides business processes to HMRC and the Home Office. The company has occupied this site for 15 years and wishes to remain to serve its two primary customers. The present lease runs out in 2017 and Fujitsu intend to renew at that point. Its staff are drawn mostly from Sefton and north Liverpool as are the 60 agency staff who work indirectly for the company.

- A3.10 Fujitsu's only concern is over the lack of parking within the facility. This, combined with parking restrictions along Farriers Way, means there are limits as to how many staff they can accommodate at any one time. Fujitsu have had to change shift patterns as a result.

Santander

- A3.11 Santander employs 2,700 on its 8.9 ha site off Bridle Road. The multi-storey office building also provides space for two separate companies which support Santander - IPSL and Swils.

- A3.12 The company is happy with its present location which is one of Santander's biggest call centres, and houses a range of different Santander Divisions. Santander Bootle is also a substantial centre for the Bank's international transactions.

- A3.13 Santander aim to retain their Bootle premises for the long term, but are not proposing any major expansions that will require more land. Any further investment will take place within the existing site area. The company is also happy with its current access arrangements.

WPA

- A3.14 WPA is a private medical insurance company that provides healthcare schemes for a number of international companies including Toyota, Fujitsu and Vodafone.

A3.15 The company currently operates a regional branch with a concentrated team through a small office in Formby. Through completion of the business survey, the company identified a need to expand to a premises towards the 200 sqm mark, but the regional branch has subsequently not expanded at the rate predicted last autumn and as a result, will not look to relocate at it currently stands.

A3.16 There may still be a requirement in the long term for a larger premises in Formby, but that is no longer expected to be in the immediate future.

Jameson Consult

A3.17 Jameson Consult is a construction and surveying firm based in Maghull but with a portfolio of work that stretches across the UK. This regional office boasts a small workforce, a number that the company will look to increase in the short term (Invest Sefton has been contacted in regards to this).

A3.18 Jameson have identified a need for larger premises in order to facilitate this growth, but wish to remain in the same area – Maghull provides them with a perfect location in regards to access to large neighbouring areas such as Liverpool, Merseyside in general and Manchester. This new premises would be utilised as the company's Headquarters.

Oriel Studios Digital

A3.19 Oriel Studios Digital is printing company that employees 20 people and currently occupies a 557 sqm industrial building on Hawthorne Road in Bootle. As the business has expanded by 25 percent in the last 12 months (even without the help of intense marketing), there is a need to upgrade to a 1,000 sqm premises. The company's current base is owned by the founder, who leases it back. As a result, rents are low – but the quality of the building is comparable.

A3.20 This move is finance restricted however, as the company has installed a number of high-cost pieces of printing equipment in the last three years (towards a £1m investment). A move at this stage would take 18-24 months and cost £70,000-£100,000 (due to the relocation of the aforementioned equipment). The company would prefer to stay in Sefton and no more than one mile away from the current premises. Oriel have cited Kingfisher Business Park as a preferable location – they would be looking to buy a unit, or rent if the rates were suitable.

Cockwill & Co

- A3.21 Established in 2006, Cockwill & Co are town and residential planners located in the Churchtown area of Southport, but their work sees them liaising with clients across the entire UK. They currently occupy a 30 sqm premises (in which they have been located for five years) but are seeking something in the region of 80 sqm in order to facilitate a planned expansion.
- A3.22 They have identified an abundance of office spaces available in the area (the contact noted that availability has not been an issue in the area for a long while), but all identified have been too small for their requirements. They has recently established a relationship with a local Investor who was set to buy a property and lease it back to them, but he pulled out at the last minute.
- A3.23 It is imperative that they relocate to a suitable premise within a short timeframe in order for their business plan to be realised.

David Halsall Removals

- A3.24 David Halsall Removals is a 37-year-old, family-owned and operated storage company looking to expand from a 200 sqm to a 1,000 sqm warehouse facility in Southport. Areas of interest are Guildford Road and Crowland Road estate.
- A3.25 DSR currently overspill to another storage facility, but would like to operate entirely in-house. They would be looking to buy, although may consider leasing a premises if the rent was deemed to be appropriate. However, in line with current fleet contracts, any move would be undertaken at the start of 2016 at the earliest.

P&O Ferries

- A3.26 P&O Ferries operates out of Seaforth Dock with an approximate workforce of 100 full-time employees. They specialise in freight shipping to Dublin, transporting both cargo and customers on commercial ferries. The company's site total 26 acres across the area and they predict a healthy 10% growth in both the short and long term.
- A3.27 Although P&O considers itself to be fully established and therefore does not foresee a need to relocate in at least the next five years, they do identify that a lack of space within the port (both at Seaforth and further South, in Liverpool) could become an

issue in the future. The proposed Port expansion in Liverpool came as welcome news to them.

Maritime Transport

A3.28 Maritime Transport has been operating out of Bootle Dock for over ten years and concern themselves with haulage – both in terms of general containers and distribution. The company currently employs 62 full-time staff and operates all over the UK, although the majority of their work takes place in Merseyside.

A3.29 Although Maritime is happy with its current facility, and intends to stay there for at least the next five years, they have identified the availability of suitable land to be an issue (in regards to the larger sizes they may look for if such a need arose).

A3.30 Employment is the biggest issue identified by Maritime, with the shortage of Drivers having been highlighted as a problem of some importance in regards to future business growth.

Bardon Aggregates

A3.31 Bardon Aggregates, located in a 100 sqm unit at Seaforth Dock, is a branch of the larger company with its headquarters in Leicestershire. They have operated since 1994 and supply general construction materials (whilst also providing infrastructure materials to port-based businesses). This small branch splits its market between Sefton (25 percent) and general Merseyside (75 percent).

A3.32 Difficulties can be found in regards to recruitment (especially in regards to employing Plant Operators) and with a projected business growth of 10-49% in short term, a lack of correct skills has been identified as a potential issue in the long term.

Freight Logistics

A3.33 Freight Logistics is a warehousing company, established in 2008 and operating out of Bootle Dock. It predicts that turnover and employee numbers will remain the same for at least the next five years, however it considers these projections to be unsatisfying.

A3.34 FL has identified a gap within its workforce – that of forklift truck operators. This requirement the company considers to go hand-in-hand on a list of potential future barriers to business growth. Adapting the levels of business rates, the company argues, should be the number one priority for the council if they are to continue to

nurture small businesses in the area – especially those focused around the port.

Appendix 4 – Employment Land Site Proformas

A4.1 The employment land site proformas comprise the remaining land within the 11 sites (MN2.46-MN2.54) proposed under Policy MN2: Housing, Employment, and Mixed Use Allocations of the emerging Local Plan. These proformas are linked to the analysis in Section 6.0 of the main Employment Land and Premises Study Update document.

NORTH SEFTON

	<table border="1"> <tr> <td>Site Name</td> <td>Southport Business Park</td> </tr> <tr> <td>Policy Reference</td> <td>MN2.50 (formally SL112_10)</td> </tr> <tr> <td>Owner</td> <td>Sefton MBC</td> </tr> <tr> <td>Agent</td> <td>-</td> </tr> <tr> <td>Size, ha</td> <td>19.11 (gross), 13.10 (net)</td> </tr> <tr> <td>Planning Status (Allocated Uses)</td> <td>Allocated for B1 uses in the Sefton Unitary Development Plan, now proposed for B1 in A Local Plan for Sefton: Submission Draft</td> </tr> </table>	Site Name	Southport Business Park	Policy Reference	MN2.50 (formally SL112_10)	Owner	Sefton MBC	Agent	-	Size, ha	19.11 (gross), 13.10 (net)	Planning Status (Allocated Uses)	Allocated for B1 uses in the Sefton Unitary Development Plan, now proposed for B1 in A Local Plan for Sefton: Submission Draft
Site Name	Southport Business Park												
Policy Reference	MN2.50 (formally SL112_10)												
Owner	Sefton MBC												
Agent	-												
Size, ha	19.11 (gross), 13.10 (net)												
Planning Status (Allocated Uses)	Allocated for B1 uses in the Sefton Unitary Development Plan, now proposed for B1 in A Local Plan for Sefton: Submission Draft												
<p>Proposal</p>	<p>The remaining undeveloped land is now divided into two sections.</p> <p>The wider area has consent for 669 dwellings, a respite and dementia care facility and retail uses on land to the south and south east of the Business Park (App. No. S/2012/0400). The consent also provides outline permission for a B1/B2/B8 (and Sui Generis motor retail) business park on 4.7 ha of land in the north east of Southport Business Park. The residential elements are currently being developed by David Wilson Homes, along with work to mitigate the site constraints. When this is complete land will be made available to the commercial arm of Wilson Bowden to implement the business park. There is no timetable for completion of this latter element. Commercial development here will be supported by funds derived from the adjacent residential developments.</p>												


	<p>Land in the south and west of the site is directly controlled by the Council. The Council is currently preparing to tender for a development partner for this land who can deliver an extension to the existing business park. It is hoped that a partner can be secured within 18 months to commence further development activities.</p>
Constraints	<p>Low level contamination due to historic landfill of household waste Ground stability constraint of running sand requires circa 30m piling. Close to proposed housing</p>
Comments	<p>Access is in place (or proposed) as part of the wider Business Park Development. There are local access issues and pressures around Kew Roundabout and in relation to movements through back routes into West Lancashire. The capacity of the immediate road network to handle uses which generate high levels of HGV use would need to be confirmed. Wider strategic connections are available via the A570 to the A59 and M58 Motorway.</p>
Market attractiveness	<p>The Council report receiving a range of informal enquiries for land and premises here, primarily from B1 businesses. This has prompted Sefton Council to seek a development partner at this time.</p> <p>Given the existing mix of uses on the site it is assumed that future development will also be for a range of B1/B2/B8 uses, providing premises both for established firms looking to grow and inward investors.</p> <p>While development may include some speculative development it is assumed that most plots will be delivered on a design and build basis to meet specific requirements. The site constraints will likely have an impact on development values and the Council do not anticipate a significant capital return on the land made available.</p> <p>The location is some distance from the motorway network and so would struggle to attract larger logistics operations. The site is also not well located in relation to the Port.</p>
Likely development potential (sectors)	<p>Administrative and support service activities Professional, scientific and technical activities Storage and distribution Manufacturing</p>
Serviced	No
Availability, years	5+

	Site Name	Land to the North of Formby Industrial Estate
	Policy Reference	MN2.48 and MN4
	Owner	S Rostron Ltd
	Agent	GL Hearn, WHR
	Size, ha	12.50 (gross), 8.00 (net)
	Planning Status (Allocated Uses)	Proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft
Proposal	<p>An indicative site masterplan has been prepared which proposes the following mix of uses:</p> <ul style="list-style-type: none"> • 20,903 sqm of B2/B8 premises in seven units of 1,858-5,574 sqm • 3,252 sqm of B1(c) starter units • 5,295 sqm of B1(a) offices/starter offices • 3,623 sqm of trade space • 5,760 sqm of hybrid space. <p>38,833 sqm total.</p> <p>This mix of uses remains indicative and could be subject to change in subsequent planning applications, however, the site has been marketed to developers on this basis.</p> <p>As is noted below, it is expected that a developer can be secured for the site by the end of the year in which the Sefton Local Plan is adopted, with a planning consent sought immediately thereafter. Depending on demand levels, construction could commence in 2018-2020.</p>	
Constraints	The site is currently in the Green Belt, pending the adoption of the Sefton Local Plan.	

	<p>The site is in a Flood Risk area (Flood Zones 2 and 3). Land near Downholland Brook in the east is particularly vulnerable – it is thought that this can be mitigated through design Ecological issues, Water Voles on site – mitigation of this is proposed within the current masterplan, though the relocation of drains in the east and the provision of settling ponds in the west.</p>
<p>Comments</p>	<p>The preferred access arrangement is a signalised junction onto the Formby Bypass (A565). Both Formby sites have good access to the M57/M58 some 10 km to the south. Accessibility will be improved with the completion of the Brooms Cross Road (A5758) in mid-2015, which will ensure the route to the motorway avoids all settlement areas and several congestion points.</p> <p>Using standard HCA densities it is possible to make the following estimates for the likely jobs which could be generated if the uses set out in the masterplan are brought forward:</p> <ul style="list-style-type: none"> • Larger B2/B8 uses: <ul style="list-style-type: none"> ○ If 100 percent B2 uses at 1 job per 36 sqm = 581 jobs ○ If 100 percent B8 uses at 1 job per 70 sqm (general warehousing) = 299 jobs ○ If 50 percent B2/50 percent B8 = 439 jobs. • B1(c) starter units at 1 job per 47 sqm = 69 jobs • B1(a) offices/starter offices at 1 job per 10 sqm (an average business park density, actual densities will vary) = 530 jobs • Trade space 1 job per 70 sqm (similar to warehousing, real densities will vary depending on the retail element within the space) = 52 jobs • Hybrid space at 1 job per 47 sqm (assumes space will be primarily used for light industry) = 123 jobs <p>Thus the maximum likely jobs generation, assuming larger space is primarily used for B2 general industry, is 1,355 jobs. A lower estimate, assuming the larger space is primarily used for B8 warehousing, is 1,073 jobs. The mid-range, with a mix of B2/B8 accommodation delivered, would be 1,213 jobs.</p> <p>The Local Plan and Community Infrastructure Levy Economic Viability Study (2014) suggests that viability may be an issue on this site. Financial Appraisals for the Viability Study suggest a deficit of £2.7 million (8 percent of Gross Development Value). However this assumes the site is developed entirely speculatively and then sold on to an investor. In practice a developer would likely take a more flexible approach to achieve profitability, possibly developing the smaller business space speculatively and offering the larger units as design and build options. If this was the case then the timeframe for site completion would be longer as design and build plots may take some years to come forward</p>
<p>Market attractiveness</p>	<p>This land has not yet been marketed and does not appear to have attracted any informal requirements businesses. However, the site has been marketed to some eight developers, of which four have shown good interest in the developing the site for the range of uses shown in the indicative masterplan. At this time they are not indicating that an element of higher value uses (beyond the trade space already proposed) will be required to secure development viability.</p> <p>Agents for the site expect to be able to secure indicative heads of terms with a preferred developer by September 2015, moving towards a legal agreement by the end of the year.</p> <p>The offer proposed for MN2.48 and MN4: Land to the North of Formby Industrial Estate is similar to that in Land to the South of Formby Industrial Estate. Both are proposing strong elements of B1(c) light industry and B8 trade units. In particular, both are proposing plots for larger B2/B8 units of</p>

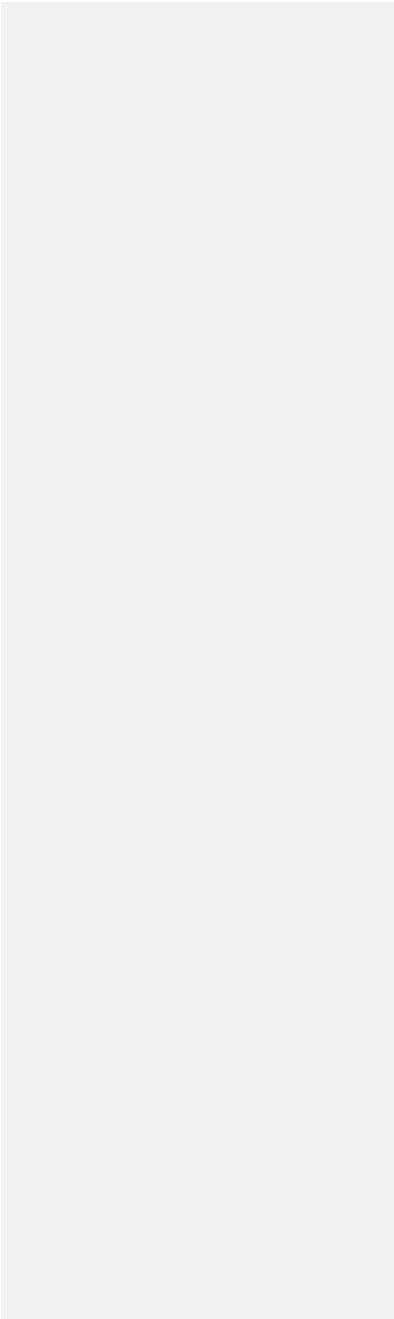
Comment [IB1]: There is a desktop viability study for this site submitted may 2014. Do the BE Group need this?

	<p>1,000 sqm or more. If, as appears likely, larger plots at both locations are offered on a Design and Build basis to established firms then it is likely that both sites will be competing to attract potential occupiers from the limited pool of companies who would want a new build unit in North Sefton.</p> <p>Despite this, initial demand evidence, in the form of informal enquiries in the south and developer interest in the north, does suggest that sufficient market requirements exist to support both sites. Delivery of space on Land to the South of Formby Industrial Estate is also expected to occur in a shorter timeframe than land in the north, and such a staggered approach to new development around Formby should minimise the risk that the two sites deliver similar property elements at the same time, particularly for the smaller premises options. Rather the two locations will likely provide an ongoing offer of space throughout the plan period in North Sefton.</p> <p>It is also noted that offices (and hybrid units) are only proposed on Land to the MN2.48 and MN4: North of Formby Industrial Estate.</p> <p>This location may not be attractive to operators who specifically support the Port of Liverpool, particularly given the alternative sites available in South Sefton. However, delivery of the Brooms Cross Road (A5758) will greatly improve the accessibility of this site to the Port and M57/M58 motorways.</p>
Likely development potential (sectors)	<p>Administrative and support service activities Construction Professional, scientific and technical activities Storage and distribution Manufacturing</p>
Serviced	No
Availability, years	<p>5+ However, this site cannot progress until the Sefton Local Plan is adopted, as it is currently in the Green Belt.</p>

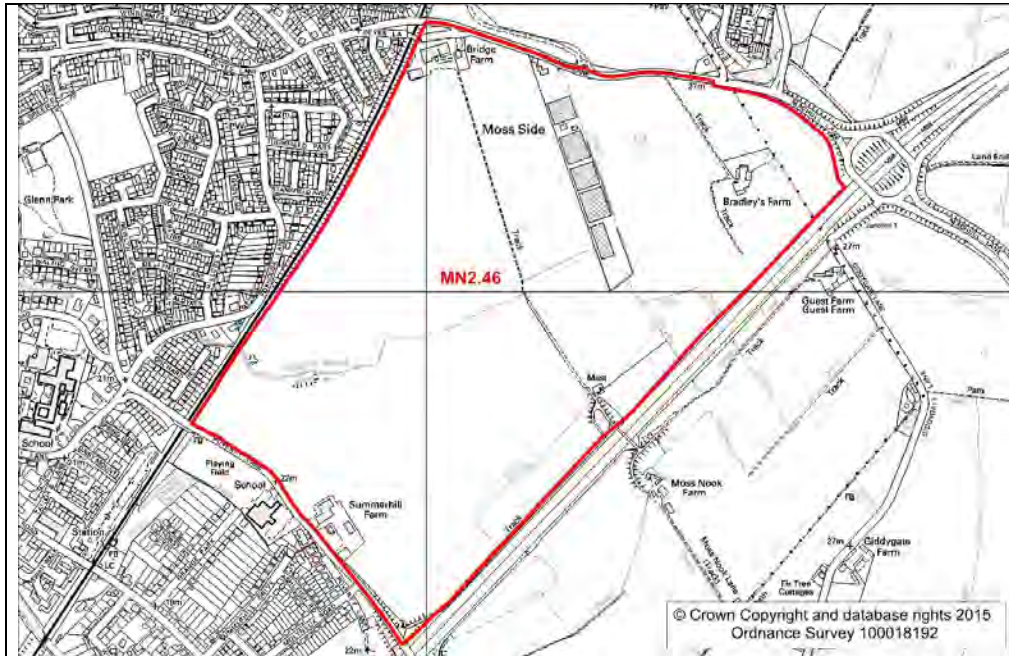
	<table border="1"> <tr> <td>Site Name</td> <td>Land South of Formby Industrial Estate</td> </tr> <tr> <td>Policy Reference</td> <td>MN2.49 and MN5</td> </tr> <tr> <td>Owner</td> <td>Private Individual/Formby Play Sports</td> </tr> <tr> <td>Agent</td> <td>DPP One, CBRE, Worthington Owen</td> </tr> <tr> <td>Size, ha</td> <td>18.00 (gross), 7.00 (net)</td> </tr> <tr> <td>Planning Status (Allocated Uses)</td> <td>Proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft</td> </tr> </table>	Site Name	Land South of Formby Industrial Estate	Policy Reference	MN2.49 and MN5	Owner	Private Individual/Formby Play Sports	Agent	DPP One, CBRE, Worthington Owen	Size, ha	18.00 (gross), 7.00 (net)	Planning Status (Allocated Uses)	Proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft
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Agent	DPP One, CBRE, Worthington Owen												
Size, ha	18.00 (gross), 7.00 (net)												
Planning Status (Allocated Uses)	Proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft												
<p>Proposal</p>	<p>St Modwen has now been secured to develop this site. The next step will be further research into site conditions, specifically:</p> <ul style="list-style-type: none"> • Design of highways access • Additional work on flood risk • Ground conditions, ecological and archaeological assessments • Cost studies and viability appraisals <p>All of the above will inform the production of a masterplan supported by a delivery plan which will be used to support case to be offered to examination and to support the Council's position on the site.</p> <p>Development, reflecting current market demand (discussed below) is expected to be for B1(c) and B8 trade uses. Units of 50-500 sqm would be delivered speculatively and could include freehold options. Larger Design and Build plots are also proposed which could provide properties of 1,000</p>												

	<p>sqm or more to established firms.</p> <p>Replacement facilities for Formby Football Club will also need to be provided. A new Sports Centre is proposed at an estimated cost of £2-3 million (subject to further understanding of the design and potential of the facility), with expected delivery in 2016/17. Facilities will include AstroTurf pitches which can be provided on land rendered otherwise undevelopable due to flood risk.</p> <p>An element of non B-Class enabling development will be required to support the high access and development costs, particularly of the Sport Centre. The applicant presently assumes these will include a mix of retail and hot food options. How these uses could compliment or compete with Formby Town Centre would need to be clarified.</p> <p>Subject to addressing the constraints, a relatively fast delivery timetable is proposed with the main elements delivered within three years and full completion likely by 2020.</p>
Constraints	<p>Site is in a Flood Risk area (Flood Zones 2 and 3). Land near Downholland Brook in the east is particularly vulnerable and has a Flood Risk of 3B which normally prohibits most types of development. A mitigation strategy is being developed by the developer which will address this would reduce the net developable area.</p> <p>There are various waterbodies on the site with associated ecological interest; a mitigation strategy for conserving these has been identified. Planning consent needed.</p>
Comments	<p>Current access proposals, which may be subject to change, are for a new 3 arm compact roundabout junction with Altcar Road. It is proposed that the access will replace the current priority junction access to the site. An additional left in / left out access / egress will be provided with the southbound carriageway of the A565 Formby Bypass. This will create a loop running through the development site.</p> <p>Current proposals are for primarily for bulky goods retail, food, sports uses and a crèche in the north and east, and B Class employment to the south and west. Traffic for the employment uses (coming in to the site at least) would therefore be required to pass through the other uses to access Altcar Road and the Formby Bypass. This may be an issue if uses which generate high numbers of HGV journeys were to be delivered in the south of the site.</p> <p>Both Formby sites have good access to the M57/M58 some 10 km to the south. Accessibility will be improved with the completion of the Brooms Cross Road (A5758), which will ensure the route to the motorway avoids all settlement areas and several congestion points.</p> <p>Finally, the addition of junctions on the A565 at this point will also reduce the amenity of the new link road for through users from Southport towards South Sefton.</p> <p>The most recent research, likely to be amended once the site masterplan is completed, suggests that some 12,300 sqm of B1/B2/B8 space could be provided here. However, this appears quite a low density of development, given that the capacity of the site, at a standard developer ratio of 3,900 sqm/hectare could be 27,300 sqm. This larger space estimate, which is closer to that proposed on MN2.48 and MN4: Land North of Formby Industrial Estate, is used to consider jobs provision on the site</p> <p>No split between the uses has been provided so an assumption (indicative only) is made that a quarter of this space is developed for B1(c) uses (6,825 sqm), a quarter for B8 trade and half for larger B2/B8 options (13,650 sqm).</p> <p>Using standard HCA densities it is possible to make the following estimates for the likely jobs which could be generated if the proposed uses are brought forward:</p>

	<ul style="list-style-type: none"> • B1(c) light industrial units at 1 job per 47 sqm = 145 jobs • Trade space 1 job per 70 sqm (similar to warehousing, real densities will vary depending on the retail element within the space) = 98 jobs • Larger B2/B8 uses: <ul style="list-style-type: none"> ○ If 100 percent B2 uses at 1 job per 36 sqm = 379 jobs ○ If 100 percent B8 uses at 1 job per 70 sqm (general warehousing) = 195 jobs ○ If 50 percent B2/50 percent B8 = 288 jobs. <p>Thus the maximum likely jobs generation, assuming larger space is primarily used for B2 general industry, is 622 jobs. A lower estimate, assuming the larger space is primarily used for B8 warehousing, is 438 jobs. The mid-range, with a mix of B2/B8 accommodation delivered, would be 531 jobs. As no agreement has been reached about the final size and mix of retail/food options on this site it is not possible to estimate the jobs which could be generated from these uses.</p> <p>Local Plan and Community Infrastructure Levy Economic Viability Study (2014) suggests that a viable scheme can be delivered here. Financial Appraisals for the Viability Study suggest a surplus of £5,147,119 (10.7 percent of Gross Development Value). This appraisal assumed quite a large amount of A1/A3 retail development (12,537 sqm) against 32,504 sqm of B1/B2/B8 uses and study conclusions suggested that, dependant on the costs of the sports facilities, the amount of enabling development could be reduced.</p>
Market attractiveness	<p>Formal marketing has not commenced here. However, site owners and agents report receiving a healthy number of informal enquiries for land and premises from local firms. Demand appears to be for B1(c) light industrial uses and B8 trade uses. This reflects the fact that the existing Formby Industrial Estate, which is dominated by B1(c) and B8 premises, is fully occupied with few good quality alternatives in North Sefton. Little interest in B1(a) offices has been received and accordingly the developers do not expect to proceed with any office development here.</p> <p>The offer proposed for MN2.49 and MN5: Land to the South of Formby Industrial Estate is similar to that in MN2.48 and MN4: Land to the North of Formby Industrial Estate. Both are proposing strong elements of B1(c) light industry and B8 trade units. In particular, both are proposing plots for larger B2/B8 units of 1,000 sqm or more. If, as appears likely, larger plots at both locations are offered on a Design and Build basis to established firms then it is likely that both sites will be competing to attract potential occupiers from the limited pool of companies who would want a new build unit in North Sefton.</p> <p>Despite this, initial demand evidence, in the form of informal enquiries in the south and developer interest in the north, does suggest that sufficient market requirements exist to support both sites. Delivery of space on MN2.49 and MN5: Land to the South of Formby Industrial Estate is also expected to occur in a shorter timeframe than land in the north, and such a staggered approach to new development around Formby should minimise the risk that the two sites deliver similar property elements at the same time, at least in terms of the smaller property options. Rather the two locations will likely provide an ongoing offer of space throughout the plan period in North Sefton.</p> <p>It is also noted that offices (and hybrid units) are only proposed on Land to the MN2.48 and MN4: North of Formby Industrial Estate.</p> <p>This location may not be attractive to operators who specifically support the Port of Liverpool, particularly given the alternative sites available in South Sefton. However, delivery of the Brooms Cross Road (A5758) will greatly improve the accessibility of this site to the Port and M57/M58 motorways.</p>
Likely development potential (sectors)	<p>Construction Storage and distribution Manufacturing</p>
Serviced	No
Availability, years	<p>3-5 However, this site cannot progress until the Sefton Local Plan is adopted, as it is currently in the Green Belt.</p>



South Sefton



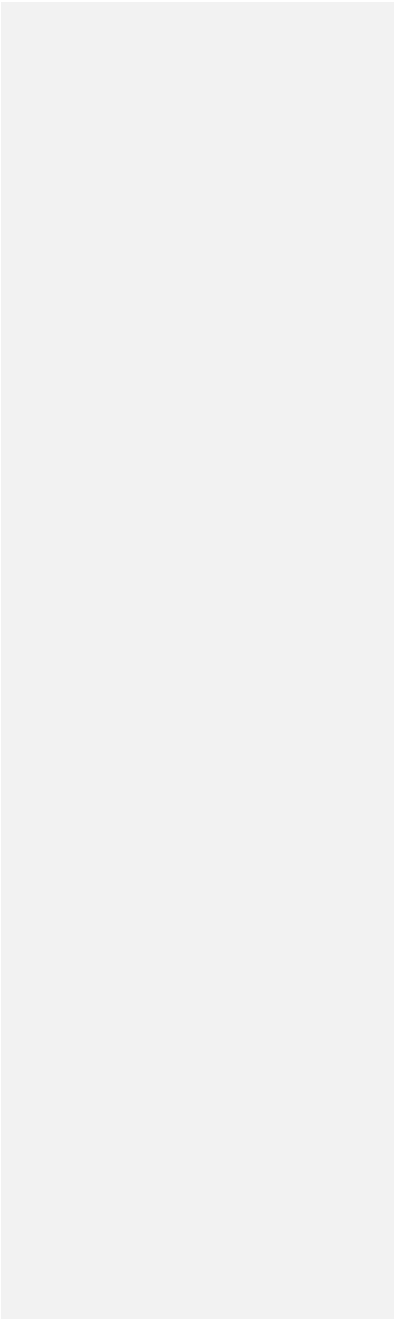
Site Name	Land East of Maghull
Policy Reference	MN2.46 and MN3
Owner	Seven owners across the wider site
Agent	-
Size, ha	20.00 (23.1 percent of a 86.65 ha mixed use site)
Planning Status (Allocated Uses)	Proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft

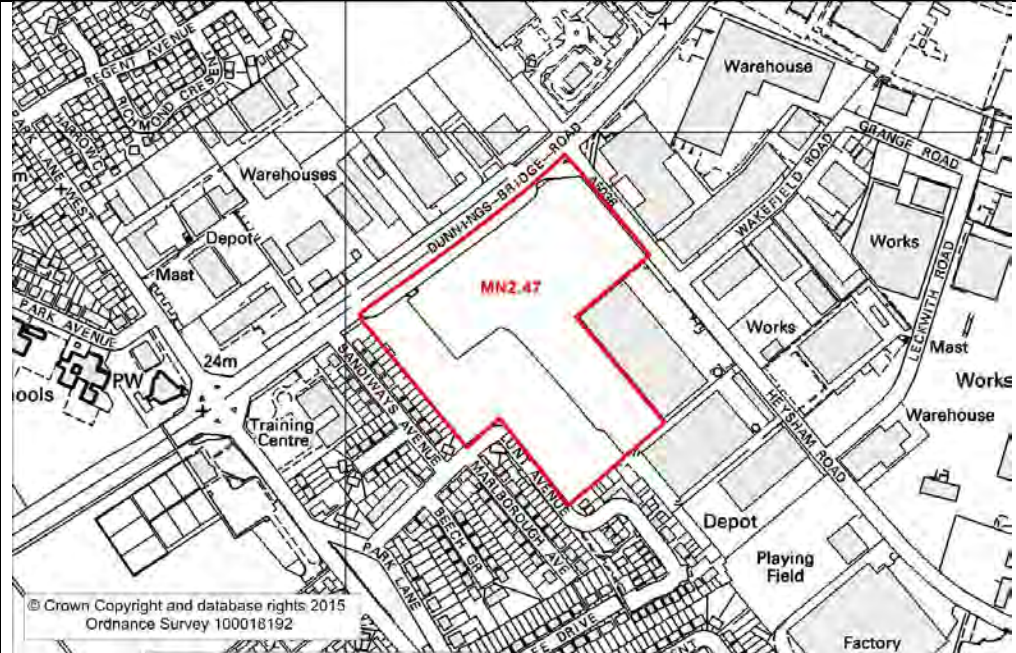
Proposal	<p>Three main developers promoting the site Persimmon, Taylor Wimpy, Hallam Land Management.</p> <p>Proposals, as set out in the Local Plan, are for:</p> <ul style="list-style-type: none"> • 1,400 dwellings • 20 ha B1/B2/B8 business park • Local retailing • Landscaping and amenity features. <p>No developer has yet been secured for the business park element.</p>
Constraints	<p>The site is currently in the Green Belt, pending the adoption of the Sefton Local Plan.</p> <p>Will be close to housing (mixed use allocation in the Local Plan).</p> <p>Planning permission required.</p> <p>The employment area is split by a north-south public right of way and associated planting, as well as drainage features.</p>

	<p>A major gas main runs through the south of the site, from east to west, through the approximate centre of the strip of land currently proposed for B1/B2/B8 uses. HSE PADHI Guidance suggests the following limitations on uses within that zone - <i>"Workplaces (predominantly non-retail) providing for 100 or more occupants in any building or 3 or more occupied storeys in height" are regarded as 'level 2' development which would not be permitted within the buffer zones"</i> Transco have an 8m easement either side of the centre line of the pipe. It is assumed that these areas would be used to accommodate road, planting and parking if the pipe cannot be relocated.</p>
<p>Comments</p>	<p>As noted below, it is suggested that this would be a viable location for B8 logistics uses, with flexibility to accommodate larger B2 manufacturing operations should demand be identified. Logistics requirements can vary considerably, with the largest National Distribution Centres exceeding 80,000 sqm in size. At present the average requirement is for 23,000 sqm units on sites of 10 ha each. Two such facilities could be delivered on the Maghull site.</p> <p>In addition to meeting demand this use would have a number of practical advantages in terms of delivery:</p> <ul style="list-style-type: none"> • Simplified preparation – Preparing only 2-4 development plots will be easier and cheaper for the development partners, encouraging early delivery of the employment element • Improved values – The 'per unit' construction cost for building logistics accommodation is around half that of building an equivalent stock of office or industrial units, while rents/prices can be high and occupiers, if renting, are usually willing to invest in longer term leases. The result can be good profitability for developers while landowners may benefit from improved values which could go some way to compensating them for the loss of residential options on their part of the site • Meeting sub-regional needs – Developing this land for B8 (or larger B2) options will allow Sefton to make a contribution to meeting the needs from Port growth. <p>It is suggested that the current linear site layout, as shown in the indicative masterplan, is not best placed to meet logistics (and larger B2) needs. While careful design could adapt the current site layout to accommodate some options a 'squarer' site would be better placed to support one or more 'big box' logistics sheds and be divided into large plots. The main access road should ideally run along the edge of the employment site, rather than through the middle, to maximise the size of the plots which could be delivered or possibly allow the whole site to be developed for a single occupier and to create a buffer to residential and other uses. The employment land should be as close to the M58 junction as possible, and possibly have direct access from the motorway roundabout. However, it is accepted that it may need to move away from the southern boundary of the site to allow for the gas main easements.</p> <p>It is suggested that the Council negotiate with the relevant parties and determine revised range of suitable masterplan options, which take all issues into account.</p> <p>If the site was developed for two 23,000 sqm B8 units (46,000 sqm), then using a standard HCA density of 1 job per 80 sqm for large scale warehouses the site would generate 575 jobs. The largest single warehouse that could be delivered here would be around 78,000 sqm in size. By the same measure it would generate 975 jobs. If the equivalent amount of space was delivered for B2 manufacturing, employment levels would be much higher at 2,167 jobs 1 job per 36 sqm.</p> <p>If the business park remained in its current configuration then most development would be for smaller B1(a), B1(c), B2 and B8 uses. The mix of employment uses is harder to predict, but assuming an even split between these options, the following jobs could be provided:</p> <ul style="list-style-type: none"> • 19,500 sqm of B1(a) at 1 job per 10 sqm = 1,950

	<ul style="list-style-type: none"> • 19,500 sqm of B1(c) at 1 job per 47 sqm = 414 • 19,500 of B2 at 1 job per 36 sqm = 542 • 19,500 of smaller B8 at 1 job per 70 sqm = 279 <p>A maximum of 3,185 jobs would therefore be possible.</p> <p>Local Plan and Community Infrastructure Levy Economic Viability Study (2014) suggests that the wider mixed use development is viable here. At 1,400 homes a development surplus of £12,066,064 or 3.8 percent of Gross Development Value can be achieved.</p>
Market attractiveness	<p>As Sefton's only employment site with direct motorway access, this land will clearly be most desirable to occupiers for whom strategic road access is essential. This may include larger manufacturing companies but is particularly likely to favour B8 logistics operations.</p> <p>This site is extremely well placed strategically for the Port, links to the M57/58 and other established logistics locations such as Skelmersdale and Knowsley Industrial Estate. It does not suffer quite the same level of immediate congestion as sites along Dunnings Bridge Road. It is also accessible by rail and to the local population.</p> <p>Demand for B8 logistics sites locally has been well established through this study, with market research identifying region wide B2/B8 requirements of up to 50,000 sqm and local demand for units up to 10,000 sqm in size. Nearby MN2.47(b): Atlantic Park is already attracting some interest from larger logistics operators. This also reflects the latest research on Port Growth which indicates demand for a further 400-500 ha of land for associated uses across the City Region and beyond. Finally, there is a regional and national shortfall of viable logistics sites.</p> <p>While some 27 ha of undeveloped expansion land exists on logistics sites in nearby Skelmersdale this remains a relatively modest stock of land compared to projected needs. Land a Maghull is some 6 km closer to the Port than these sites and more directly accesses the M58.</p> <p>There is no evidence of demand for larger offices at this location. Although there is some interest in B1(a) options at MN2.47(b): Atlantic Park, the office market in Sefton remains limited compared to the industrial/warehouse sectors and an office park at this location would struggle to compete with Liverpool City Centre and Liverpool Waters. Market comments suggests that major office occupiers remain unwilling to consider peripheral locations in the Liverpool Conurbation such as Maghull.</p> <p>Smaller B1(a, c)/B2/B8 options may also be viable here, reflecting local demand for units of up to 500 sqm. These could be accommodated on the employment area as envisaged in the current masterplan. Local demand is healthy and a business park at this location would have the advantage of direct motorway access. However, the 20 ha business park site could deliver some 78,000 sqm of small business space and given likely provision of such units on land north and south of Formby Industrial Estate, at the MN2.47(a): former Peerless Refinery, MN2.47(c): Senate Business Park and elsewhere on Dunnings Bridge Road during the Plan Period it is important not to oversupply the area. Thus if MN2.46 and MN3: Land East of Maghull is taken forward as a primarily small business scheme it is suggested that further demand research is required to determine if local and sub-regional demand can support this scale of provision, at this location.</p>
Likely development potential (sectors)	<p>Administrative and support service activities Construction Professional, scientific and technical activities Storage and distribution Manufacturing</p>
Serviced	No

Availability, years	5+ However, this site cannot progress until the Sefton Local Plan is adopted, as it is currently in the Green Belt.
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	Site Name	former Peerless Refinery, Dunning's Bridge Road, Netherton
	Policy Reference	MN2.47(a) (Formerly BL159)
	Owner	Chancerygate
	Agent	-
	Size, ha	5.80
	Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft
Proposal	<p>Owner Chancerygate's goal is to remediate the site and seek outline consent for B1/B2/B8 employment uses. Chancerygate would look to release land on a design and build basis.</p> <p>Chancerygate have taken steps to assess the level of site contamination and begin site remediation. It is expected that that site remediation costs will lead to viability gap, which may require an element of higher value, non B-Class development to address this.</p> <p>The latest proposals from Chancerygate suggest a priority of relocating existing local businesses from Sefton and the wider City Region onto the site alongside some enabling development of non B-Class uses. It is expected that the scale of non B1/B2/B8 enabling development will represent no more than 25-30 percent of the total development, which is broadly consistent with Policy MN2 of the emerging Local Plan.</p> <p>Based on market research, the Dunning's Bridge Road Investment Strategy suggests that the following mix of uses could be successful here:</p> <ul style="list-style-type: none"> • Light industrial units of up to 500 sqm each (on the frontage) • An element of trade/wholesale use here (20-40 percent) to increase values, and help overcome site constraints. • Larger B2 industrial premises of 5,000-6,000 sqm each to rear. 	

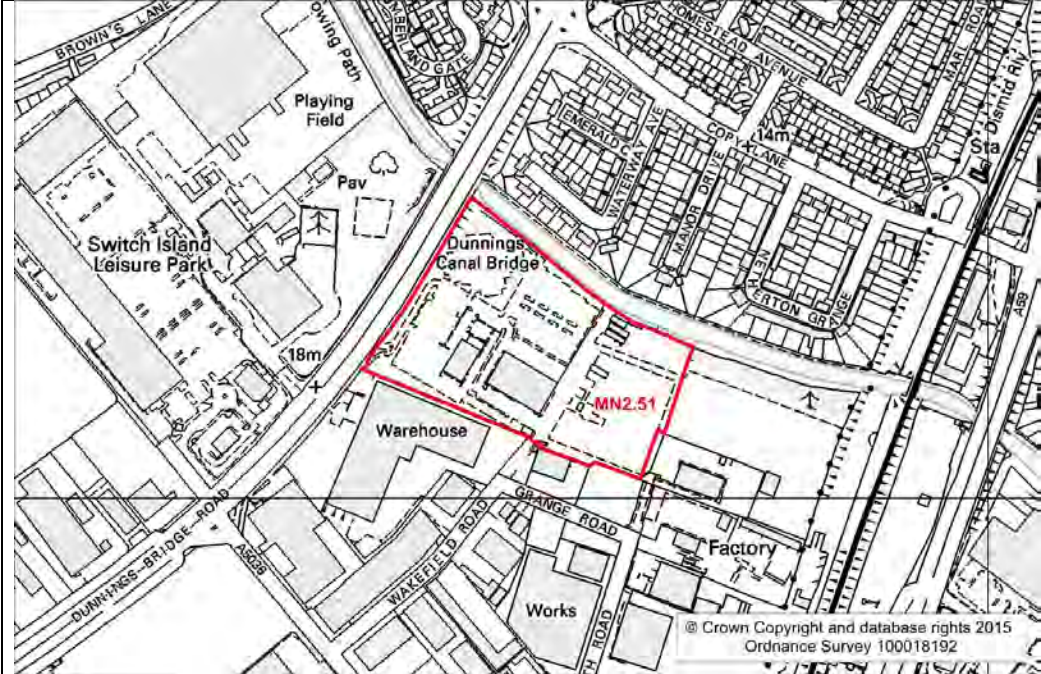
Constraints	Contamination on site Close to housing.
Comments	Site access arrangements would need to be determined but it is assumed that access off Heysham Road would appear to be most acceptable. The site has good access to the A5036 Dunnings Bridge Road Corridor, either via Heysham Road. The Port of Liverpool is 4 km to the south west and the M58/M57 junction is only 1 km to the north east. However, it is a strongly congested route at peak times.
Market attractiveness	<p>The owner has received a number of enquiries for the land from various potential occupiers in industrial sectors, including some warehouse based uses. Demand at this location therefore appears reasonable although, reflecting demand patterns elsewhere on Dunnings Bridge Road, is expected to include an element of trade and retail use.</p> <p>Although change may still be dependent on obtaining some gap funding or agreeing an element of higher value use, to overcome the land contamination issues, the assumption is that Chancerygate will proceed with a development scheme in the short/medium term independent of activities elsewhere on Dunnings Bridge Road.</p> <p>Valuation research, undertaken in late 2014 for the Dunnings Bridge Road Investment Strategy (2015), broadly supports Chancerygate's assertions that development here is not viable if 100 percent of the site were developed for light industrial and warehousing uses. A loss of around 8 percent against costs was recorded against such a scenario. An element of higher value use would therefore appear to be justified although an alternative approach, put forward in the Investment Strategy would be development of the site for a single large warehouse premises which would have a much lower per unit development cost.</p>
Likely development potential (sectors)	Manufacturing Construction Transportation and Storage
Serviced	No
Availability, years	1-3

	<table border="1"> <tr> <td>Site Name</td> <td>Atlantic Park, Dunning's Bridge Road, Netherton</td> </tr> <tr> <td>Policy Reference</td> <td>MN2.47(b) (Formerly BL112/BL161)</td> </tr> <tr> <td>Owner</td> <td>Sefton MBC (let on a long leasehold to Royal London Asset Management)</td> </tr> <tr> <td>Agent</td> <td>Industrial Securities</td> </tr> <tr> <td>Size, ha</td> <td>19.83 (gross), 16.80 (net)</td> </tr> <tr> <td>Planning Status (Allocated Uses)</td> <td>Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft. Previous outline consent for a B1/B2/B8 Employment Park and Trade Park (App. No. S/2006/1165) which permits up to 74,324 sqm of development. The time limit for implementation of this consent was recently extended to June 2018 (App. No. DC/2015/00573). The consent assumes that the frontage would be for offices and the rear for industrial and warehouse uses.</td> </tr> </table>	Site Name	Atlantic Park, Dunning's Bridge Road, Netherton	Policy Reference	MN2.47(b) (Formerly BL112/BL161)	Owner	Sefton MBC (let on a long leasehold to Royal London Asset Management)	Agent	Industrial Securities	Size, ha	19.83 (gross), 16.80 (net)	Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft. Previous outline consent for a B1/B2/B8 Employment Park and Trade Park (App. No. S/2006/1165) which permits up to 74,324 sqm of development. The time limit for implementation of this consent was recently extended to June 2018 (App. No. DC/2015/00573). The consent assumes that the frontage would be for offices and the rear for industrial and warehouse uses.
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Size, ha	19.83 (gross), 16.80 (net)												
Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft. Previous outline consent for a B1/B2/B8 Employment Park and Trade Park (App. No. S/2006/1165) which permits up to 74,324 sqm of development. The time limit for implementation of this consent was recently extended to June 2018 (App. No. DC/2015/00573). The consent assumes that the frontage would be for offices and the rear for industrial and warehouse uses.												
<p>Proposal</p>	<p>Royal London report a flexibility as to how the site is ultimately brought forward for development (i.e. with the retention or demolition of existing large premises onsite), depending on who they can ultimately secure as occupiers.</p> <p>Viability research, undertaken for the Dunning's Bridge Road Investment Strategy (2015) suggests that MN2.47(b): Atlantic Park is the most readily developable site within the Dunning's Bridge Road area based on the potential financial returns. This reflects the current demand for, and financial viability of, large-scale warehouse development where a combination of long lease terms, strong rental levels, strong yield and relatively low build cost generate a high return. The development of this site should be able to deliver a profit for the developer, if developed as large B8 unit for appropriate leasehold.</p> <p>The Dunning's Bridge Road Investment Strategy put forward two options for the development of this site:</p> <ul style="list-style-type: none"> Option A: A single new build warehouse premises of some 46,000 sqm (replacing the existing Big Ft2 (former Rolls Royce) building) to meet the requirements of a specific occupier 												

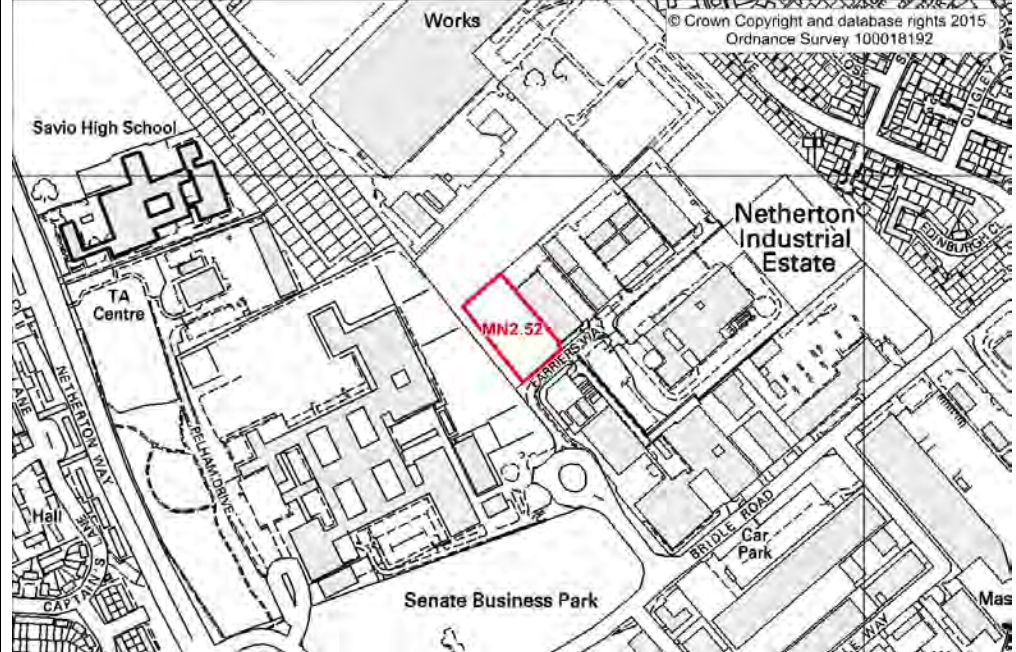
	<ul style="list-style-type: none"> Option B: Retention of the existing 27,000 sqm former Rolls Royce manufacturing building. Refurbishment and sub-division of the property to accommodate occupiers of 4,500-5,500 sqm. Development of other land for industrial/warehouse units of 4,500-5,500 sqm.
Constraints	Close to housing
Comments	<p>Site access is developed and in place including a signalised junction with Dunnings Bridge Road.</p> <p>Site is on the main A5036 Dunnings Bridge Road Corridor between the Port of Liverpool (5 km to the south west) and the M58/M57 junction (2 km to the north east). This is an established and growing route for HGV traffic</p> <p>However, it is also a strongly congested route at peak times.</p>
Market attractiveness	<p>Site is actively being marketed to B2 manufacturing and B8 logistics operators. Royal London Asset Management report a significant increase in interest at MN2.47(b): Atlantic Park since the announcement of the 'Superport' proposals, primarily as MN2.47(b): Atlantic Park is the closest strategic development site to the Port of Liverpool.</p> <p>Royal London has been in negotiations with a logistics operator for 18 months who have a requirement for a modern 46,000 sqm logistics building. This would be developed, by Royal London, on the site of the former Rolls Royce building and available land to the south.</p> <p>However, Royal London has also received a number of equally promising enquiries from Merseyside industrial/warehouse companies looking for 4,500-5,500 sqm. These could be accommodated within the existing former Rolls Royce building. In the short term at least, these appear most likely to be realised.</p> <p>Demand here has improved significantly over 2014/15 and an improvement in occupancy is likely here in the short/medium term, even if it is occupancy of existing premises rather than new development.</p> <p>Current level of demand may also support more office development on the Dunnings Bridge Road frontage (which could accommodate another 9,000 sqm (approx.) of space). However, any development would be to provide design and build options for secured occupiers only. Royal London has ruled out further speculative development here.</p>
Likely development potential (sectors)	<p>Administrative and support service activities</p> <p>Manufacturing</p> <p>Professional, scientific and technical activities</p> <p>Storage and distribution</p>
Serviced	Yes
Availability, years	5+

<p>© Crown Copyright and database rights 2015 Ordnance Survey 100018192</p>	<table border="1"> <tr> <td>Site Name</td> <td>Senate Business Park, Netherton</td> </tr> <tr> <td>Policy Reference</td> <td>MN2.47(c) (Formerly BL156_3/BL156_5)</td> </tr> <tr> <td>Owner</td> <td>Sefton MBC</td> </tr> <tr> <td>Agent</td> <td>Sefton MBC</td> </tr> <tr> <td>Size, ha</td> <td>13.45 (gross), 4.2 (net)</td> </tr> <tr> <td>Planning Status (Allocated Uses)</td> <td>Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft</td> </tr> </table>	Site Name	Senate Business Park, Netherton	Policy Reference	MN2.47(c) (Formerly BL156_3/BL156_5)	Owner	Sefton MBC	Agent	Sefton MBC	Size, ha	13.45 (gross), 4.2 (net)	Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft
Site Name	Senate Business Park, Netherton												
Policy Reference	MN2.47(c) (Formerly BL156_3/BL156_5)												
Owner	Sefton MBC												
Agent	Sefton MBC												
Size, ha	13.45 (gross), 4.2 (net)												
Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft												
<p>Proposal</p>	<p>The Council has received offers for the site under a formal tendering process and as at July 2015 is considering the options that the tenders offered. The Dunning's Bridge Road Investment Strategy put forward two options for the development of this site:</p> <ul style="list-style-type: none"> • Option A: A single manufacturing or logistics property of up to 16,000 sqm to meet the identified demand for logistics/B2 manufacturing options resulting, at least in part, from Port growth. • Option B: Mix of light industrial units of up to 500 sqm, or larger B2 industrial premises of 5,000-6,000 sqm to meet current needs for smaller premises, for local firms. 												
<p>Constraints</p>	<p>Site has been reclaimed and is ready for development.</p>												
<p>Comments</p>	<p>Site access point is in place. Site has good access to A5036 Dunning's Bridge Road Corridor, via Netherton Way. This route does suffer some congestion but the site is well placed between motorway and Port. The Port of Liverpool is 4 km to the south west and the M58/M57 junction is 4 km to the north east.</p>												

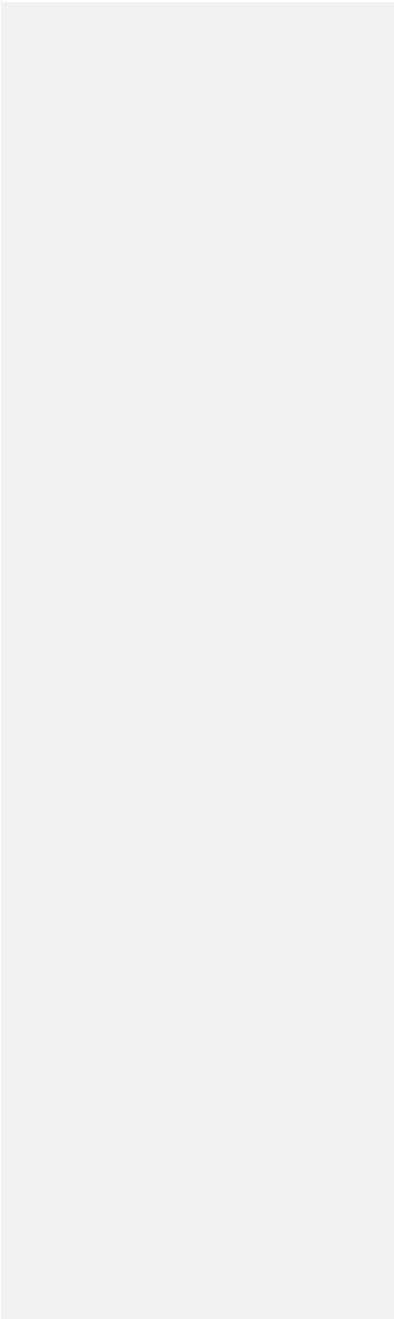
	<p>Based on an average developer ratio of 3,900 sqm/ha the site could accommodate a single B2 or B8 unit of up to 16,000 sqm, i.e. a small to mid-sized logistics or general industrial property.</p> <p>It should also be noted that the Homes and Communities Agency (HCA), which previously reclaimed the land, have a clawback option which, if enacted, could take away any capital receipt generated here. However, in recent discussions HCA indicated a willingness to examine the possibilities of creating a local investment fund which would permit monies extracted from development here to be reinvested locally.</p>
Market attractiveness	<p>Demand at this location has been established through the confidential responses to the recent tendering process. Prior to the tendering process the Council received enquiries for warehouse units of around 3,000 sqm here.</p> <p>Viability research, undertaken at the end of 2014 for the Dunnings Bridge Road Investment Strategy suggests that a development of larger industrial/logistics premises here, which will have a correspondingly lower unit cost, would deliver a surplus. However, given the marginal nature of industrial development at that time, the surplus generated was expected to be modest.</p>
Likely development potential (sectors)	<p>Storage and distribution</p> <p>Manufacturing</p>
Serviced	No
Availability, years	1-3

	<table border="1"> <tr> <td>Site Name</td> <td>Switch Car Site, Wakefield Road, Netherton</td> </tr> <tr> <td>Policy Reference</td> <td>MN2.51 (formally BL163_2)</td> </tr> <tr> <td>Owner</td> <td>UK Car Group</td> </tr> <tr> <td>Agent</td> <td>-</td> </tr> <tr> <td>Size, ha</td> <td>4.69</td> </tr> <tr> <td>Planning Status (Allocated Uses)</td> <td>Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft</td> </tr> </table>	Site Name	Switch Car Site, Wakefield Road, Netherton	Policy Reference	MN2.51 (formally BL163_2)	Owner	UK Car Group	Agent	-	Size, ha	4.69	Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft
Site Name	Switch Car Site, Wakefield Road, Netherton												
Policy Reference	MN2.51 (formally BL163_2)												
Owner	UK Car Group												
Agent	-												
Size, ha	4.69												
Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft												
<p>Proposal</p>	<p>The owner, UK Car Group wishes to bring this site forward for development and has indicated that it may have some (confidential) parties interested in land here. The developer has the funds to fully deliver a redevelopment scheme without public sector support. However, UK Car Group also argues that an element of higher value uses would need to be included within any development to ensure financial viability.</p> <p>UK Car Group indicated a willingness to participate in a wider development scheme, incorporating other plots within Heysham Road, to deliver a new site access off Heysham Road.</p>												
<p>Constraints</p>	<p>Contains derelict buildings Site access is heavily constrained</p>												
<p>Comments</p>	<p>Prime access at present is via a backland point off Wakefield Road which could not support a high frequency of HGV journeys. As with MN2.47(a): former Peerless Refinery site, this site is prominently positioned on the A5036 Dunnings Bridge Road Corridor. The Port of</p>												

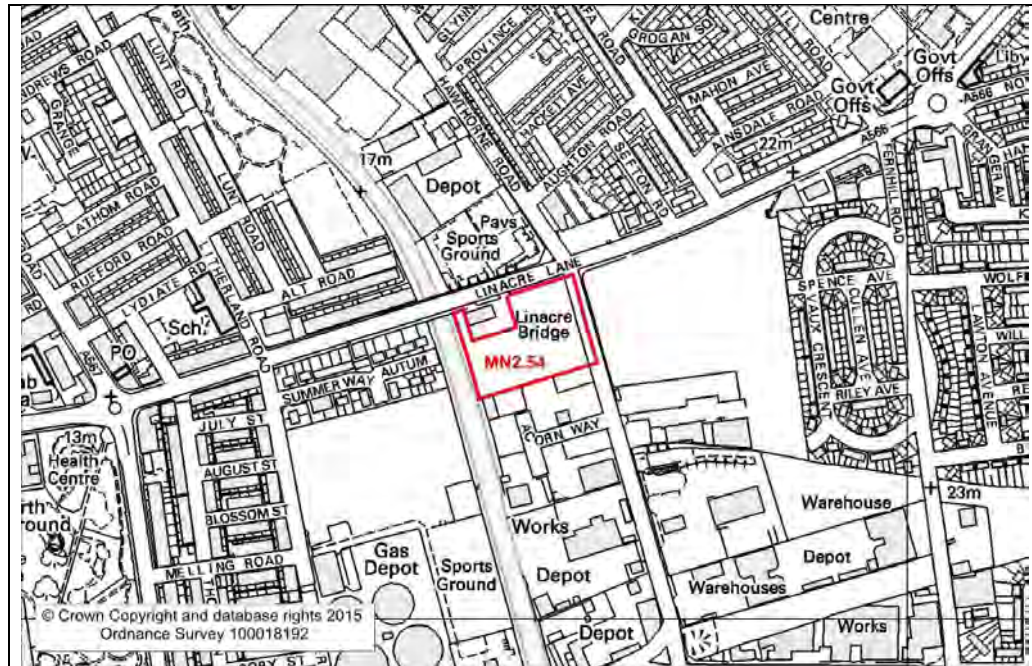
	Liverpool is 4 km to the south west and the M58/M57 junction is only 1 km to the north east.
Market attractiveness	<p>The site has been on the market for 5 years, with a headline value of £2 million. It has attracted interest from a supermarket and several industrial occupiers looking for land on short term lets. However, site issues have meant that a deal could not be reached.</p> <p>Modest demand appears to exist at this location and the land is very prominently located on the strategic road network. However, this site has constrained access and development here would be more effective if it could take in neighbouring landholdings to better link it to the Heysham Road/Dunnings Bridge Road junction.</p> <p>The costs of providing infrastructure to this site are expected to be high and valuation research, undertaken for the Dunnings Bridge Road Investment Strategy (2015) indicates that purely industrial/office scheme will not deliver the necessary values to make the scheme viable (although viability research here did not just look at site MN2.51, but rather included adjacent land parcels which may have redevelopment potential).</p> <p>The Investment Strategy therefore recommended that any scheme include an element of higher value retail/leisure uses. In addition to boosting site specific values, such uses would better serve the Dunnings Bridge Road area and meet the suggested need for a greater roadside services along this strategic road corridor. The mix of uses could include:</p> <ul style="list-style-type: none"> • Petrol Filling Station • Hot food outlets • Pub-restaurant • Convenience retail (e.g. mini-mart).
Likely development potential (sectors)	<p>Administrative and support service activities</p> <p>Construction</p> <p>Manufacturing</p> <p>Professional, scientific and technical activities</p> <p>Storage and distribution</p>
Serviced	No
Availability, years	5+

	Site Name	Land at Farriers Way, Netherton
	Policy Reference	MN2.52 (formerly BL158)
	Owner	Sefton MBC (Held on a long leasehold by Hansteen)
	Agent	Hansteen
	Size, ha	0.53
	Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft
Proposal	On the market for design and build development for in excess of ten years	
Constraints	Possible ground contamination The adjacent site is a proposed Waste allocation in the Local Plan (Policy IN3)	
Comments	-	
Market attractiveness	<p>A long term design and build opportunity site. Farriers Way Industrial Estate as a whole is popular and Hansteen report good interest for smaller units of 50 sqm, from both start-up businesses and existing micro firms, with the number of requirements exceeding supply. However, the Estate is not presently attracting interest from larger, established firms who might look for to invest in a design and build option. It is not clear if an improving local market will significantly alter this position, particularly if developments at nearby MN2.47(b): Atlantic Park, MN2.47(a): former Peerless Refinery and MN2.51: Switch Car deliver competing design and build sites which are more prominently located on the Dunnings Bridge Road Corridor.</p> <p>Hansteen are asset managers rather than developers and it is considered unlikely that they would develop this site themselves as an extension to the existing industrial estate. This does not preclude a third party development.</p>	

Likely development potential (sectors)	Manufacturing Construction
Serviced	Yes
Availability, years	5+



	<table border="1"> <tr> <td>Site Name</td> <td>former Lanstar Site, Hawthorne Road, Bootle</td> </tr> <tr> <td>Policy Reference</td> <td>MN2.53 (formerly BL149)</td> </tr> <tr> <td>Owner</td> <td>Tesco</td> </tr> <tr> <td>Agent</td> <td>-</td> </tr> <tr> <td>Size, ha</td> <td>0.97</td> </tr> <tr> <td>Planning Status (Allocated Uses)</td> <td>Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft. The land has consent for B1(c) light industrial uses.</td> </tr> </table>	Site Name	former Lanstar Site, Hawthorne Road, Bootle	Policy Reference	MN2.53 (formerly BL149)	Owner	Tesco	Agent	-	Size, ha	0.97	Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft. The land has consent for B1(c) light industrial uses.
Site Name	former Lanstar Site, Hawthorne Road, Bootle												
Policy Reference	MN2.53 (formerly BL149)												
Owner	Tesco												
Agent	-												
Size, ha	0.97												
Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft. The land has consent for B1(c) light industrial uses.												
Proposal	Planning permission for 2,592 sqm of employment space, linked to development of the adjacent foodstore (which opened in 2009). In 2012, the owner received a three year extension in which to deliver the employment floorspace which is expected to lapse shortly.												
Constraints	Next to urban greenspace Next to strategic path Adjacent to proposed North Mersey Railway line												
Comments	-												
Market attractiveness	Located next to the good quality and popular Kingfisher Business Park this would be a desirable location for B1(c) light industrial uses. However, given the ongoing delays in bringing this forward, it is unclear what commitment to development the current landowner has.												
Likely development potential (sectors)	Manufacturing Construction												
Serviced	Yes												
Availability, years	5+												

	<table border="1"> <tr> <td>Site Name</td> <td>Linacre Bridge, Linacre Lane, Bootle</td> </tr> <tr> <td>Policy Reference</td> <td>MN2.54 (formally BL260)</td> </tr> <tr> <td>Owner</td> <td>Private Individual</td> </tr> <tr> <td>Agent</td> <td>-</td> </tr> <tr> <td>Size, ha</td> <td>1.01</td> </tr> <tr> <td>Planning Status (Allocated Uses)</td> <td>Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft</td> </tr> </table>	Site Name	Linacre Bridge, Linacre Lane, Bootle	Policy Reference	MN2.54 (formally BL260)	Owner	Private Individual	Agent	-	Size, ha	1.01	Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft
Site Name	Linacre Bridge, Linacre Lane, Bootle												
Policy Reference	MN2.54 (formally BL260)												
Owner	Private Individual												
Agent	-												
Size, ha	1.01												
Planning Status (Allocated Uses)	Allocated for B1/B2/B8 in the Sefton Unitary Development Plan, now proposed for B1/B2/B8 in A Local Plan for Sefton: Submission Draft												
Proposal	Temporary car wash on site Owner may have aspirations for non-employment uses (affordable housing)												
Constraints	Potentially contaminated Possible Waste Allocation to the south (Policy IN3)												
Comments	-												
Market attractiveness	Relatively prominent site on a main route into Bootle Town Centre. Part of an existing budget quality employment area although the land is increasingly bounded by housing and thus development here would have to be for uses that can co-exist with residential uses.												
Likely development potential	Administrative and support service activities Construction Manufacturing Professional, scientific and technical activities												
Serviced	No												
Availability, years	3-5												

Appendix 5 – Sites Scoring System

Location	Proximity to strategic highway network	Site adjacent to motorway junction – score 10 Site 1 km from motorway junction – score 9 Site 2 km from motorway junction – score 8 For each further km distance from junction, reduce score by one point, i.e. any site 10 km or further from motorway junction scores zero
	Prominence	Site adjacent to, and visible from motorway junction – score 10/9 Site adjacent to, and visible from dual carriageway – score 8/7 Site adjacent to, and visible from primary route – score 6/5 adjacent to, and visible from A-road – score 4/3 Site has local prominence, e.g. within its industrial location – score 2/1/0
Public Transport		Site within 250m of a bus route and within 0.5 km of a rail station – score 10 Site within 250m of a bus route <u>or</u> 0.5 km of a rail station – score 5 Limited public transport – score 0
Planning Status		If site has detailed planning status – score 10 If site has outline planning status – score 6 If site approved in the development plan – score 4 If site is available, subject to planning – score 1
Services Availability		If all services are provided and in place – score 10 If priority services are available with no abnormal costs – score 7 If all priority services are available, but with abnormal costs – score 3 Some services are unavailable – score 0
Constraints		May be physical, planning, or legal Take a subjective view – reduce score by 2 for each constraint If there are none – score 10
Environmental Setting		Subjective sliding scale, 0-10, for example if: High quality business park/greenfield location – score 10 Moderate quality industrial estate – score 5 Poor quality industrial estate/in-fill location – score 2
Flexibility		In terms of site shape and ability to sub-divide to suit smaller occupiers. Subjective, but consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.
Availability		Site is available to develop in 0-1 years – score 10 Site is available to develop in 1-3 years – score 8 Site is available to develop in 3-5 years – score 6 Site is available to develop in 5+ years – score 0

Site Ref	Site Name	Area	Size, ha	Road Proximity	Prominence	Public Transport	Planning Status	Services Availability	Constraints	Environmental Setting	Flexibility	Availability	Total	Market-led Sub-Total	Availability, years
MN2.47(b) (Formerly BL112/ BL161)	Atlantic Park, Dunnings Bridge Road, Netherton	South Sefton	16.80	8	8	5	10	10	6	10	10	0	67	36	5+
MN2.53 (formerly BL149)	former Lanstar Site, Hawthorne Road, Bootle	South Sefton	0.97	7	8	10	10	10	4	6	5	0	60	26	5+
MN2.47(a) (Formerly BL159)	former Peerless Refinery, Dunnings Bridge Road, Netherton	South Sefton	5.80	9	8	5	4	7	6	4	8	8	59	29	1-3
MN2.47(c) (Formerly BL156_3/ BL156_5)	Senate Business Park, Netherton	South Sefton	4.20	7	2	5	4	7	10	5	7	8	55	21	1-3
MN2.51 (formally BL163_2)	Switch Car Site, Wakefield Road, Netherton	South Sefton	4.69	8	8	10	4	7	6	4	7	0	54	27	5+
MN2.46 and MN3	Land East of Maghull	South Sefton	20.00	10	10	5	1	7	0	9	10	0	52	39	3-5
MN2.49 and MN5	Land South of Formby Industrial Estate	North Sefton	7.00	3	8	5	1	7	4	10	8	6	52	29	3-5
MN2.50 (formally SL112_10)	Southport Business Park	North Sefton	13.10	0	2	5	6	7	6	10	10	6	52	22	3-5

Appendix 7 – Employment Area Proformas – North Sefton

The employment area proformas relate to areas of developed land and buildings, in B1/B2/B8 use (i.e. the industrial estates and business parks) in the Borough. These include areas previously allocated in the UDP for employment purposes, which are now proposed for allocation as 'Primarily Industrial Areas' under Policy ED3 of the emerging Local Plan. Where relevant, previous UDP applications of developed B-Class land, which are now proposed in the Local Plan for other uses are considered here. These proformas are linked to the analysis in Section 6.0 of the main Employment Land and Premises Study Update document.

Southport Business Park is considered here, but to avoid double counting, only the developed portion of the park is considered here (6.01 ha). Undeveloped land (Local Plan Policy MN2) is analysed as part of Sefton's vacant employment land supply in Section 6.0 of the main report and at Appendix 4.

Address Birkdale Trading Estate Liverpool Road Birkdale North Sefton		Category to link LA policy description ED3 Primarily Industrial Area	
Description Scheme of budget quality workshops, trade premises and lock up storage units in a dense backland site, with constrained access off Liverpool Road.		Grade Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average Total Grade: D	
Total Number of Units	36 (Plus storage containers)	Vacant	1 Occupancy Rate, percent 97
Predominant Use Class (B1, B2, B8)		B1(c)/B8/A1/A3/D2	
Buildings Age			
– Pre 1945 1945-90 ✓ 90-2000 New 2000+			
Buildings Quality			
– Derelict Poor ✓ Average Good			
Area Size, ha		0.75	
Comments			
<p>At present the estate is almost fully occupied with a diverse range of local start-ups and micro businesses, who are making good use of one of North Sefton's largest backland sites. The location presently accommodates some 25 individual businesses on less than a hectare of land, plus 14 further tenanted storage units/storage containers.</p> <p>However, this location is undergoing change and there is a need for continuing monitoring to understand and account for the following issues:</p> <ul style="list-style-type: none"> • The growth of non B-Class occupation – Approximately half the current businesses in the area are in trade, A1 retail and A3 hot food uses. When the current position is compared to site surveys made for the 2010 and 2012 Sefton Employment Land and Premises Studies, the trend for occupation outside traditional B-Class uses appears to be increasing. If this continues and B1/B2/B8 operations may become a minority use at Birkdale Trading Estate and there could be a need to re-designate the area for local planning purposes • Premises Quality – The Trading Estate contains older, budget premises which is nearing the end of its economic life. While the location is clearly still meeting local business needs at present there is a need to monitor conditions to ensure this remains the case. One concern raised by stakeholders associated with site is the impact of the Energy Act 2011. From April 2018 it will be unlawful to let commercial properties with the lowest EPC Ratings (F or G). It is felt that most properties at Birkdale Trading Estate fall in these categories, meaning that properties vacant after that time, cannot be marketed without significant investment • Occupancy Levels – Agents for the site report that it is becoming more challenging to attract new tenants to the location and the turnover of tenants is relatively high. Approximately two thirds of the units have changed occupier since 2011. Approximately eight units are occupied by tenants reported to be in arrears or otherwise unable to pay the full market rents. As most of the current leases will be due for renewal in the next few years, there is a risk that void 			

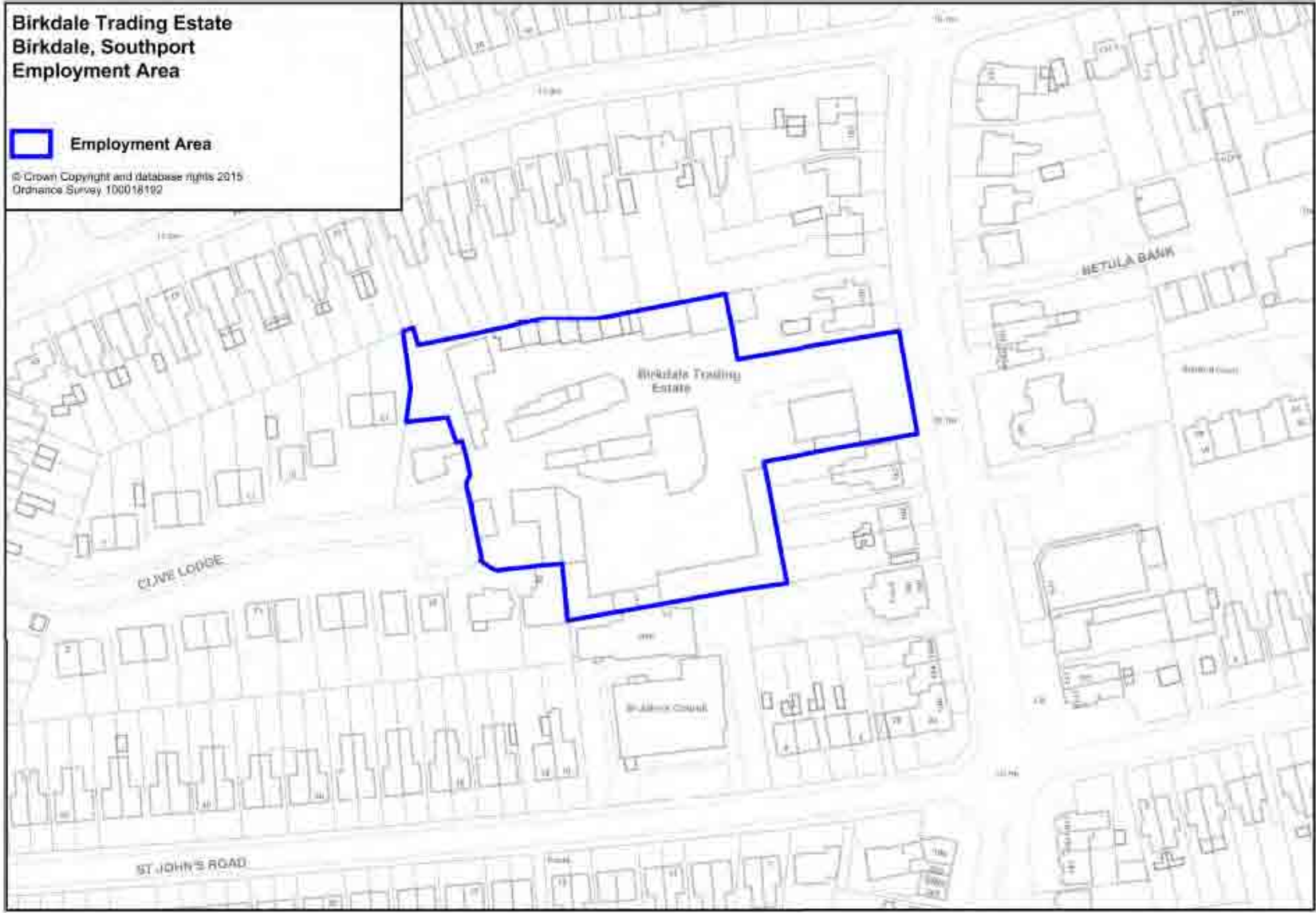
levels may increase.

If the above issues do begin to impact on the location then there will be a need to plan for its future. While a redevelopment of the area for B-Class uses may be achievable, this backland site is unlikely to be particularly attractive to developers, especially while options remain around Formby Industrial Estate and Southport Business Park. Financial appraisals, which are indicative only, produced by the areas agents also suggest that viability might be a barrier.

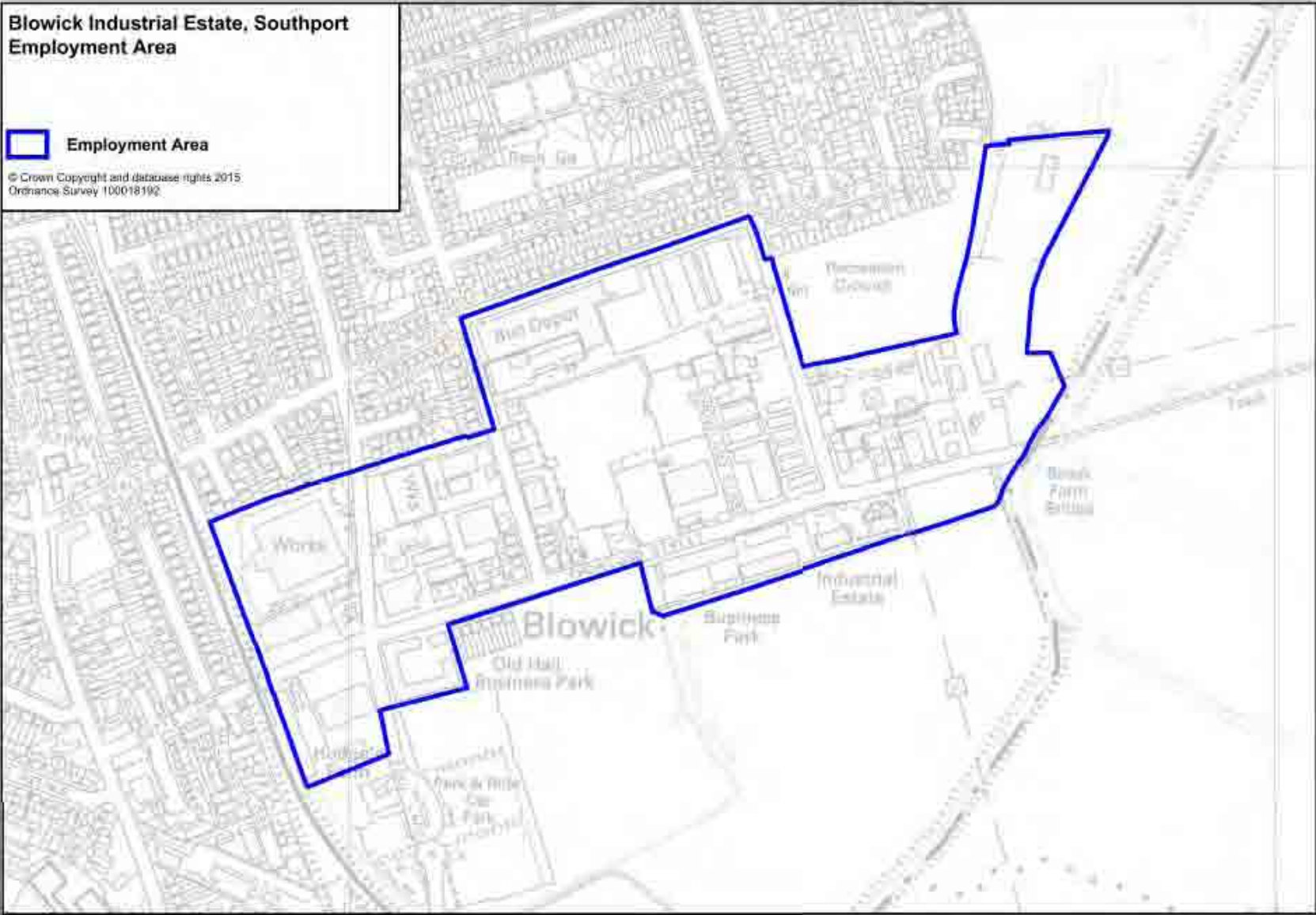
Relocation of the existing occupiers within North Sefton could also be challenging given the current availability of premises on local industrial estates. Achieving it would likely require moving at least some businesses to other backland sites in Southport and Birkdale.

Future Role

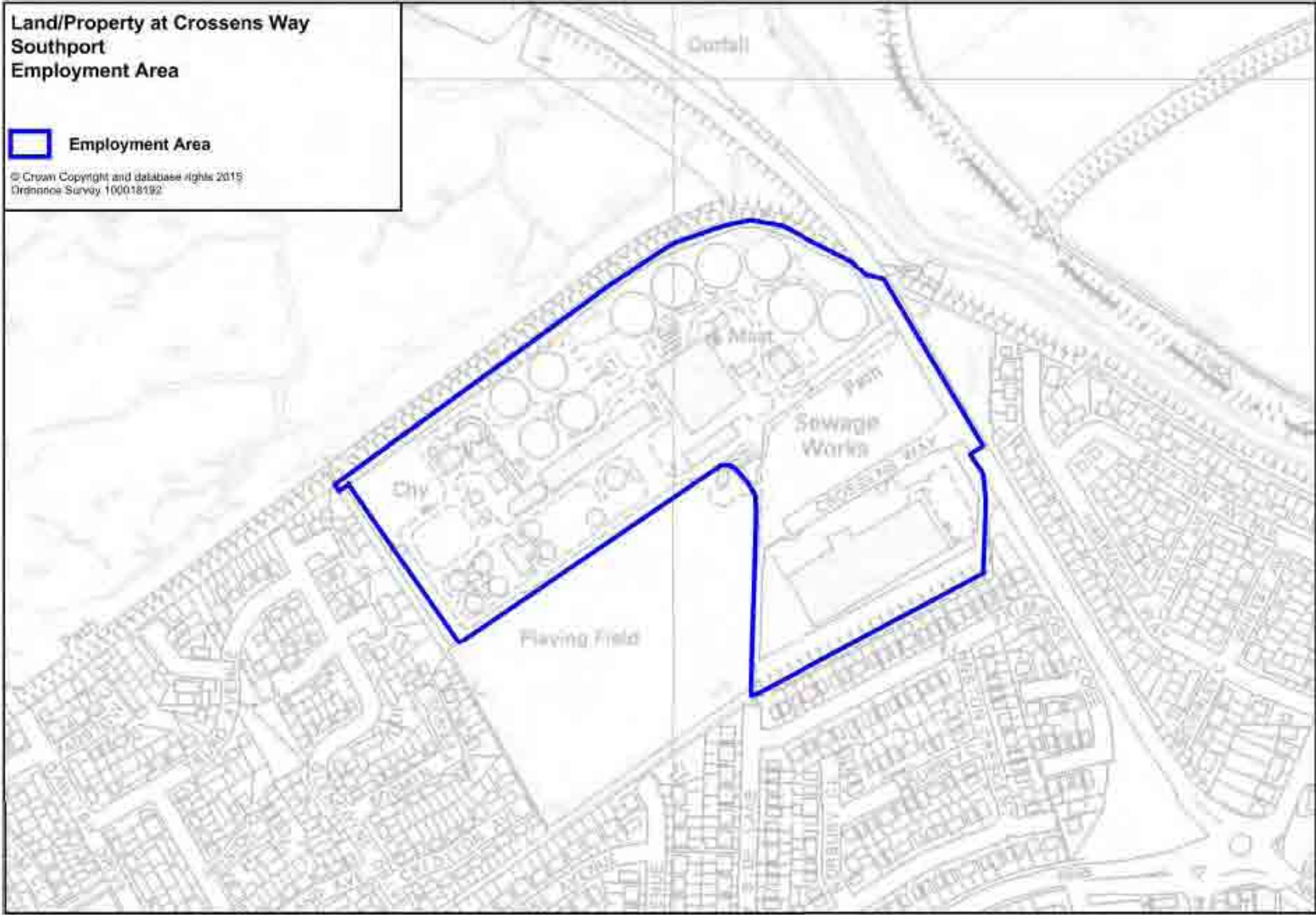
Based on the current scale and density of occupation there is good justification in continuing to protect this location for B1/B8 uses. However, ongoing monitoring is required to ensure changing conditions here are accounted for.



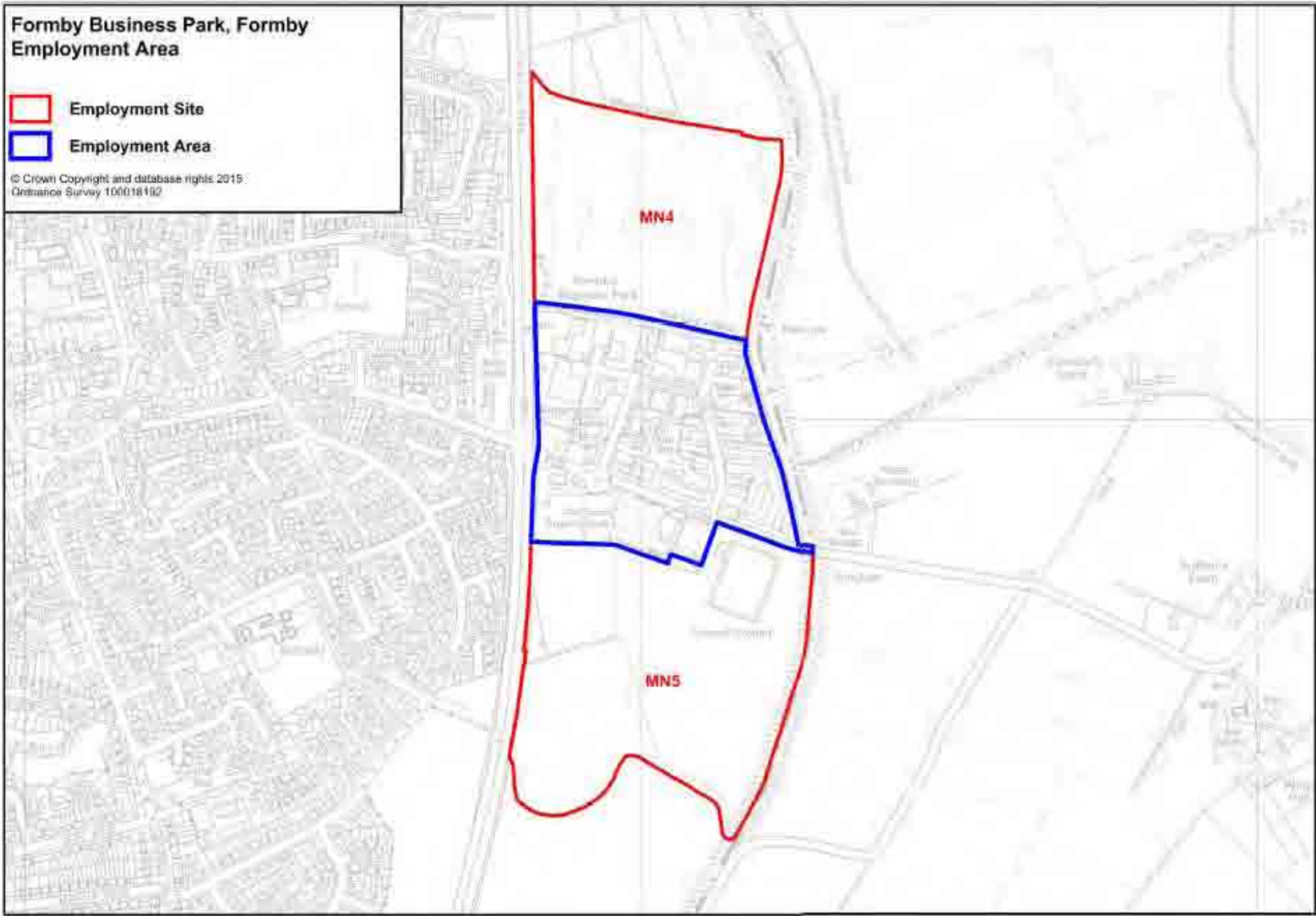
Address Blowick Industrial Estate Southport North Sefton		Category to link LA policy description ED3 Primarily Industrial Area	
Description Southport's largest industrial estate, with mix of trade counters and small industrial units.		Grade Critical mass: Good Accessibility: Poor Prominence: Poor Environment: Poor Total Grade: C/D	
Total Number of Units 67	Vacant 6	Occupancy Rate, percent 91	
Predominant Use Class (B1, B2, B8)		B1(a, c)/B2/B8	
Buildings Age			
– Pre 1945 ✓	1945-90 ✓	90-2000 ✓	New 2000+ ✓
Buildings Quality			
– Derelict ✓	Poor ✓	Average	Good
Area Size, ha		26.31	
Comments An area of older buildings on Crowland Close has been vacant an on the market for almost a decade. It remains available as a modest development opportunity although the experience of marketing suggests this is not a particularly desirable location for new premises.			
Future Role Although it contains some areas of vacant land/property, Blowick IE remains a significant local employment area in North Sefton, both for local micro business and larger industrial/trade occupiers. In particular, it is key source of smaller B1 industrial, B2, B8 accommodation. There is scope for both redevelopment and expansion in, and around, the Employment Area. Land around Butts Lane is in trade use, but the further encroachment of trade onto locations further east, along Crowland Street, is unlikely given the lack of prominence of the rest of the estate.			



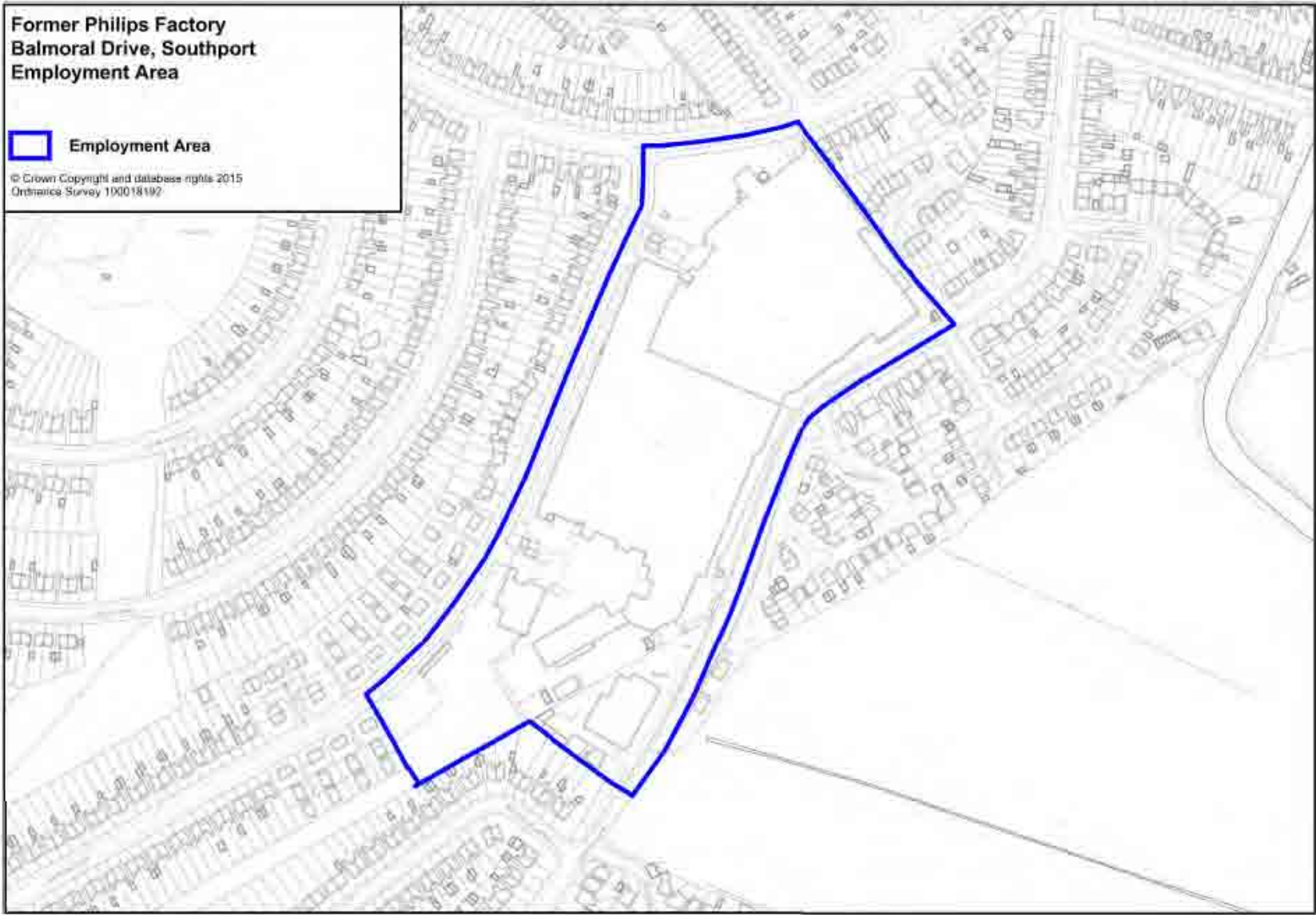
Address Crossens Way Southport North Sefton		Category to link LA policy description ED3 Primarily Industrial Area	
Description Small employment area comprising Railex premises and United Utilities water treatment plant plus vacant allocated site.		Grade Critical mass: Average Accessibility: Good Prominence: Good Environment: Poor Total Grade: C/D	
Total Number of Units 12	Vacant 0	Occupancy Rate, percent 100	
Predominant Use Class (B1, B2, B8)		B1(c)/B8 (Railex building) and Water Treatment Plant	
Buildings Age			
– Pre 1945 ✓	1945-90 ✓	90-2000 ✓	New 2000+
Buildings Quality			
– Derelict	Poor	Average ✓	Good
Area Size, ha	12.42		
Comments A small area of expansion land exists between the Railex building and United Utilities water treatment plant. This is previously a UDP employment site although there has been no evidence of demand for land here and the site is accordingly not retained as an employment development site in the emerging Local Plan.			
Future Role Retain as local employment site to serve North Sefton, providing B1/B2/B8 uses.			



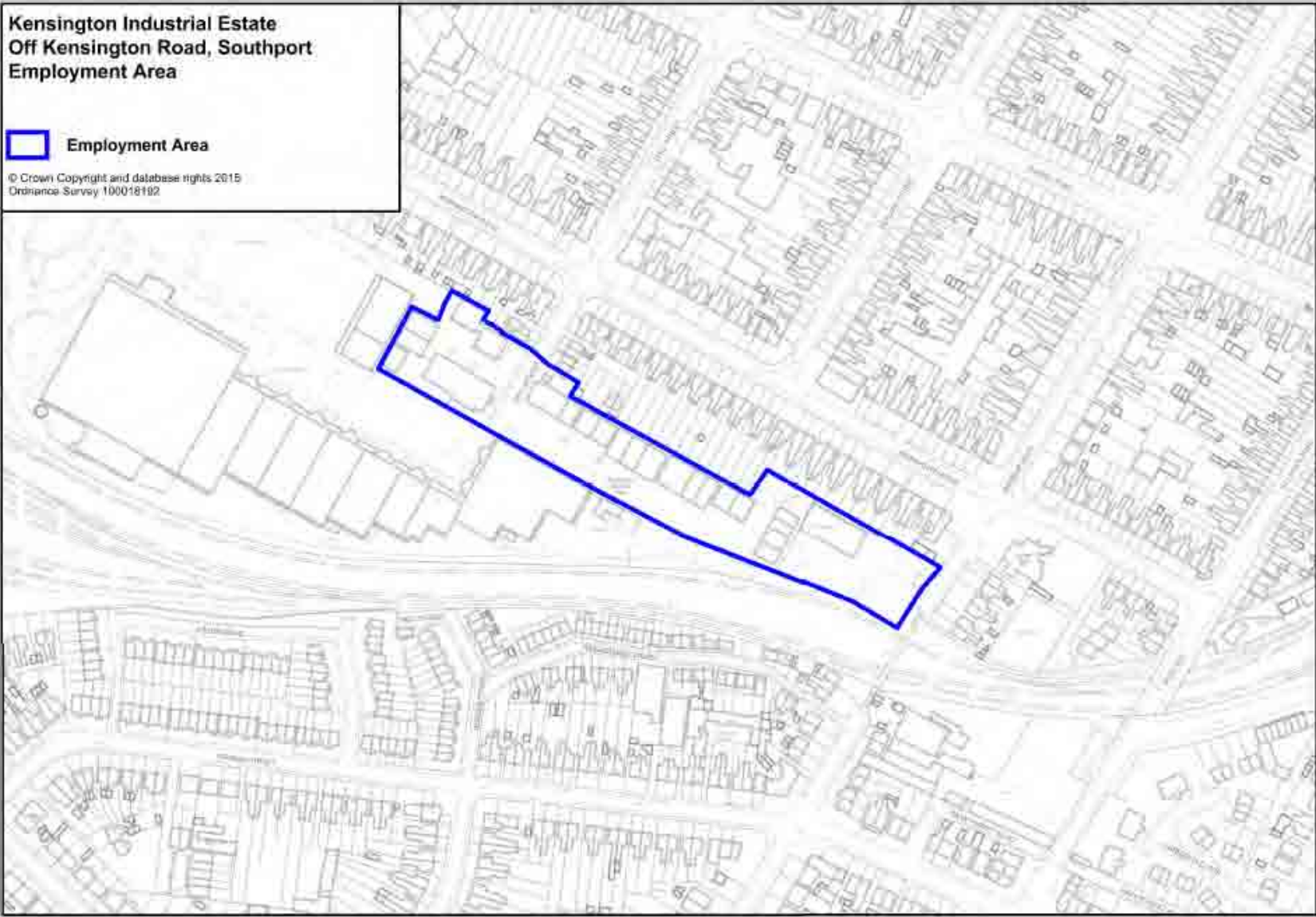
Address		Category to link LA policy description	
Formby Business Park Altcar Road Formby Central Sefton		ED3 Primarily Industrial Area	
Description		Grade	
Mixed use area comprising industrial, retail and quasi retail uses.		Critical mass: Good Accessibility: Good Prominence: Good Environment: Good Total Grade: B/C	
Total Number of Units	56	Vacant	0
		Occupancy Rate, percent	100 (excluding retail uses)
Predominant Use Class (B1, B2, B8)		B1(c)/B2/B8/A1/Sui Generis	
Buildings Age			
– Pre 1945 1945-90 ✓ 90-2000 ✓ New 2000+ ✓			
Buildings Quality			
– Derelict Poor Average Good ✓			
Area Size, ha	13.94		
Comments			
<p>An established, mixed-use employment area which is well placed on the A586 Formby Bypass to serve North and Central Sefton, while benefitting from improved access to the M57/M58 Motorways. The existing Business Park appears fully occupied with a range of mostly established local and regional/national firms.</p> <p>The encroachment of trade and retail uses north of Altcar Road has reduced options for B1 and B2 occupiers though, particularly on locations with Bypass and Altcar Road frontage. However, this will be addressed with the provision of two large employment sites north (MN2.48: Land to the North of Formby Industrial Estate) and south (MN2.49: Land to the South of Formby Industrial Estate). Formal marketing has not commenced on either site but land to the south has attracted informal requirements from a number of local businesses, while land to the north has attracted interest from four developers. This provides evidence of further demand here.</p>			
Future Role			
Key local employment area for Formby (Central Sefton). Notwithstanding the prospects for further development on adjacent land, the Council should still seek to protect the existing B-Class from further encroachment of A1 retail and trade, particularly as the two employment sites are likely to provide some additional retail/trade options.			



Address		Category to link LA policy description	
Former Philips Factory Balmoral Drive Southport North Sefton		EDT5 Primarily Industrial Area in UDP/MN2.3 Housing Allocation in emerging Local Plan	
Description		Grade	
Former factory complex in a primarily residential area, now largely vacant and derelict.		Critical mass: Poor Accessibility: Average Prominence: Poor Environment: Poor Total Grade: E	
Total Number of Units	N/A	Vacant	N/A
Predominant Use Class (B1, B2, B8)		B2/B8	
Buildings Age			
– Pre 1945		1945-90 ✓	90-2000
New 2000+			
Buildings Quality			
– Derelict ✓		Poor ✓	Average
Good			
Area Size, ha	6.00		
Comments			
<p>Main factory complex appears fully vacant and is moving into a state of dereliction. Only one portion of the area, at the junction of North Road and Balmoral Drive, remains occupied, primarily by Design Production Installation (DPI).</p> <p>The evidence is that the existing employment blocks no longer meet modern occupier requirements. Redevelopment or major refurbishment will be difficult and costly in a location tightly bound by housing on all sides. There is also no evidence of demand for redeveloped/refurbished premises at this backland location which is some distance from the other Employment Areas of North Sefton.</p> <p>With these issues in mind the current Local Plan proposal to reallocate this site for housing appears justifiable.</p>			
Future Role			
<p>Reallocate for alternative uses, which given the almost exclusively residential nature of surrounding land is assumed to be housing. However, any redevelopment scheme will need to account for the one main occupier who is still trading from this area, DPI, and ensure this established business can be viably relocated within the Borough.</p>			



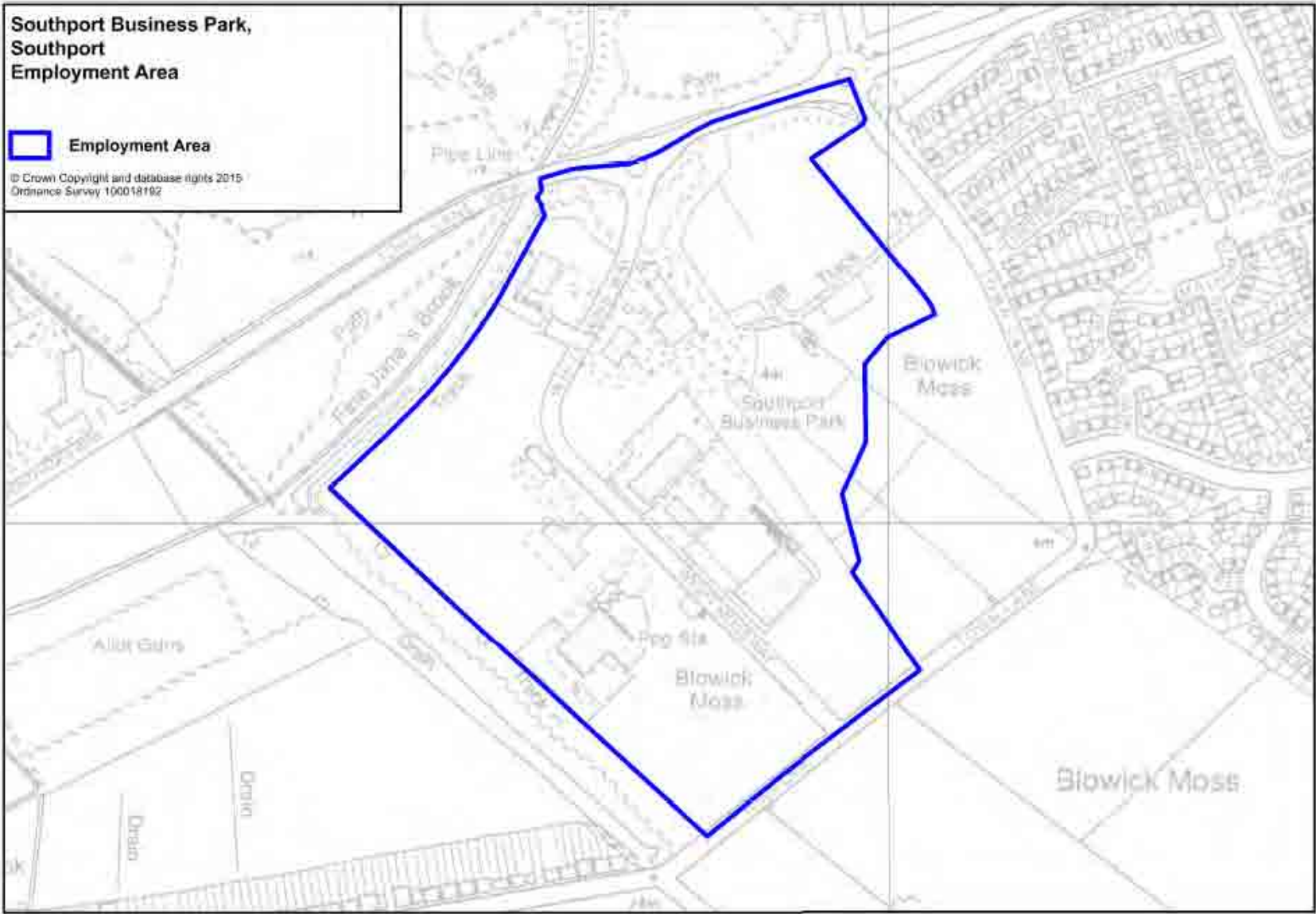
Address		Category to link LA policy description	
Kensington Industrial Estate Off Kensington Road Southport North Sefton		ED3 Primarily Industrial Area	
Description		Grade	
Small linear densely developed scheme of light industrial and trade counter units.		Critical mass: Average Accessibility: Poor Prominence: Poor Environment: Average Total Grade: C	
Total Number of Units	19	Vacant	5
		Occupancy Rate, percent	74
Predominant Use Class (B1, B2, B8)		B1(c)/B8	
Buildings Age			
– Pre 1945 1945-90 ✓ 90-2000 ✓ New 2000+			
Buildings Quality			
– Derelict Poor Average ✓ Good			
Area Size, ha	1.34		
Comments			
Provides a range of trade uses which complement the adjacent retail offer of Southport Town Centre.			
Future Role			
Retain as trading estate to serve local North Sefton market.			



Address Slaidburn Crescent Southport North Sefton		Category to link LA policy description ED3 Primarily Industrial Area	
Description Small, densely developed industrial estate of small industrial units. Has retail/trade counter use to Fylde Road frontage.		Grade Critical mass: Good Accessibility: Average Prominence: Average Environment: Average Total Grade: C	
Total Number of Units 25	Vacant 0	Occupancy Rate, percent 100	
Predominant Use Class (B1, B2, B8)		B1(c)/B2/B8	
Buildings Age			
– Pre 1945	1945-90 ✓	90-2000 ✓	New 2000+
Buildings Quality			
– Derelict	Poor	Average ✓	Good
Area Size, ha	6.58		
Comments Established local industrial estate in a primarily residential area, with little scope for growth. Accommodates some established local employers including Bell and Stork.			
Future Role Key local employment area to serve North Sefton.			



Address Southport Business Park Town Lane Kew Southport North Sefton		Category to link LA policy description MN2 Housing, Employment and Mixed Use Allocations	
Description Purpose designed out of town business park, predominantly comprising self-contained B1(a) offices.		Grade Critical mass: Average Accessibility: Good Prominence: Average Environment: Good Total Grade: B	
Total Number of Units 10	Vacant 1	Occupancy Rate, percent	90
Predominant Use Class (B1, B2, B8)		B1(a, b)/B8/D1	
Buildings Age			
Nos – Pre 1945	1945-90	90-2000	New 2000+ ✓
Buildings Quality			
Nos – Derelict	Poor	Average	Good ✓
Area Size, ha	6.01 (Developed land only)		
Comments The Council has received further informal enquiries for land and premises here.			
Future Role Flagship employment area for North Sefton.			



Appendix 8 – Objectively Assessed Needs Forecast Calculations

This appendix details the calculations undertaken to convert jobs projections, for the three forecast scenarios into land need projections.

Cambridge Econometrics - 2012-2030

Sector	2012 Jobs (thousands)	2030 Jobs (thousands)	Jobs Change 2012-2030 (thousands)	Percentage of staff Occupying B1, B2, B8 Floorspace (percent)	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
1 Agriculture, etc.	0.5	0.9	0.4	5	20	12	240
2 Mining & quarrying	-	-	-	-	-	-	-
3 Manufacturing	4.6	4.6	-	100	-	47	-
4 Elect., gas, water etc.	0.3	0.3	-	26	-	12	-
5 Construction	6.6	7.2	0.6	26	156	12	1,872
6 Distribution	17.1	17.5	0.4	48	192	70	13,440
7 Transport & storage	4.6	5.5	0.9	48	432	70	30,240
8 Accommodation & food services	6.4	7.6	1.2	-	-	-	-
9 Information & communication	1.6	1.5	-0.1	100	-100	12	-1,200
10 Financial & business services.	15.0	20.4	5.4	100	5400	12	64,800
11 Government services	35.2	39.2	4	22	880	12	10,560
12 Other services	5.2	5.8	0.6	100	600	12	7,200
Total	97.3	110.4					

Source: Cambridge Econometrics, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 128,352 sqm - 32.91ha (at 3,900 sqm/ha)
- From sectors predicted to decline: 1,200 sqm - 0.31 ha (at 3,900 sqm/ha).

Cambridge Econometrics - 2012-2035

Sector	2012 Jobs (thousands)	2035 Jobs (thousands)	Jobs Change 2012-2035 (thousands)	Percentage of staff Occupying B1, B2, B8 Floorspace (percent)	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
1 Agriculture, etc.	0.5	0.8	0.3	5	30	12	360
2 Mining & quarrying	-	-	-	-	-	-	-
3 Manufacturing	4.6	4.4	-0.2	100	-200	47	-9,400
4 Elect., gas, water etc.	0.3	0.3	-	26	-	12	-
5 Construction	6.6	7.3	0.7	26	182	12	2184
6 Distribution	17.1	17.7	0.6	48	280	70	19,600
7 Transport & storage	4.6	5.6	1.0	48	480	70	33,600
8 Accommodation & food services	6.4	7.9	1.5	-	-	-	-
9 Information & communication	1.6	1.5	-0.1	100	-100	12	-1,200
10 Financial & business services.	15.0	20.8	5.8	100	5800	12	69,600
11 Government services	35.2	40.3	5.1	22	1122	12	13,464
12 Other services	5.2	5.9	0.7	100	700	12	8,400
Total	97.3	112.5					

Source: Cambridge Econometrics, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 147,208 sqm - 37.75 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: 10,600 sqm – 2.72 ha (at 3,900 sqm/ha).

Cambridge Econometrics – Calculation of Past Take Up 1992-2012

Sector	1992 Jobs (thousands)	2012 Jobs (thousands)	Jobs Change 1992-2012	Percentage of staff Occupying	Net Jobs	Floorspace occupied	Floorspace Need, sqm
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			(thousands)	B1, B2, B8 Floorspace (percent)		per person (sqm)	
1 Agriculture, etc.	0.4	0.5	0.1	5	5	12	60
2 Mining & quarrying	0.1	0.0	-0.1	-	-	-	-
3 Manufacturing	8.8	4.6	-4.2	100	-4,200	47	-197,400
4 Elect., gas, water etc.	0.8	0.3	-0.5	26	-130	12	-1,560
5 Construction	6.8	6.6	-0.2	26	-52	12	-624
6 Distribution	21.5	17.1	-4.4	48	-2,112	70	-147,840
7 Transport & storage	4.8	4.6	-0.2	48	-96	70	-6,720
8 Accommodation & food services	6.5	6.4	-0.1	-	-	-	-
9 Information & communication	1.0	1.6	0.5	100	500	12	6,000
10 Financial & business services.	13.7	15.0	1.3	100	1,300	12	15,600
11 Government services	32.7	35.2	2.5	22	550	12	6,600
12 Other services	4.9	5.2	0.3	100	300	12	3,600
Total	101.8	97.3					

Source: Cambridge Econometrics, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 31,860 sqm - 8.17 (at 3,900 sqm/ha)
- From sectors predicted to decline: 354,144 - 90.8 ha (at 3,900 sqm/ha).

Cambridge Econometrics – Calculation of Past Take Up 2000-2007

Sector	2000 Jobs (thousands)	2007 Jobs (thousands)	Jobs Change 2000-2007 (thousands)	Percentage of staff Occupying B1, B2, B8 Floorspace	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
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				(percent)			
1 Agriculture, etc.	0.4	0.6	0.2	5	10	12	1,200
2 Mining & quarrying	0.1	0.0	-0.1	-	-	-	-
3 Manufacturing	7.6	6.5	-1.1	100	1,100	47	-51,700
4 Elect., gas, water etc.	0.3	0.4	-0.1	26	286	12	3,432
5 Construction	7.6	7.3	-0.3	26	78	12	936
6 Distribution	23.5	18.5	-5	48	2,400	70	28,800
7 Transport & storage	5.1	4.7	-0.4	48	-192	70	-2,304
8 Accommodation & food services	5.6	7.5	2.4	-	-	-	-
9 Information & communication	5.2	1.7	-3.5	100	3,500	12	-42,000
10 Financial & business services.	14.9	16.4	1.5	100	1,500	12	18,000
11 Government services	37.6	39.7	2.1	22	462	12	5,544
12 Other services	5.9	6.6	0.7	100	700	12	8,400
Total	113.7	109.8					

Source: Cambridge Econometrics, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 66,312 sqm –17 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: 96,004 sqm – 24.61ha (at 3,900 sqm/ha).

Oxford Economics - 2012-2030

Sector	2012 Jobs (thousands)	2030 Jobs (thousands)	Jobs Change 2012-2030 (thousands)	Percentage of staff Occupying B1, B2, B8 Floorspace	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm

				(percent)			
A:Agriculture, forestry and fishing	0.5	0.5	0	5	0	12	-
B:Mining and quarrying	0.0	0.0	0	-	-	-	-23,500
C:Manufacturing	4.4	3.9	-0.5	100	-500	47	-312
D:Electricity, gas, steam and air conditioning supply	0.1	0.0	-0.1	26	-26	12	312
E:Water supply; sewerage, waste management and remediation activities	0.1	0.2	0.1	26	26	12	4,680
F:Construction	6.4	7.9	1.5	26	390	12	0
G:Wholesale and retail trade; repair of motor vehicles and motorcycles	17.1	17.6	0.5	-	-	-	6,720
H:Transportation and storage	4.9	5.1	0.2	48	96	70	-
I:Accommodation and food service activities	6.8	6.7	-0.1	-	-	-	-
J:Information and communication	1.5	1.5	0	100	-	12	-
K:Financial and insurance activities	4.1	4.1	0	100	-	12	13,200
L:Real estate activities	1.3	2.4	1.1	100	1100	12	36,000
M:Professional, scientific and technical activities	4.3	7.3	3	100	3000	12	25,200
N:Administrative and support service activities	5.3	7.4	2.1	100	2100	12	-4,488
O:Public administration and defence; compulsory social security	9.1	7.4	-1.7	22	-374	12	-1,320
P:Education	9.9	9.4	-0.5	22	-110	12	-
Q:Human health and social work activities	18.0	20.2	2.2	-	-	12	-
R:Arts, entertainment and recreation	2.5	3.3	1.1	-	-	-	6,000
S:Other service activities	2.7	3.2	0.5	100	500	12	-
Total	99.3	108.0					

Source: Oxford Economics, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 92,112 sqm - 23.63 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: 29,620 sqm - 7.59ha (at 3,900 sqm/ha)

Oxford Economics - 2012-2035

Sector	2012 Jobs (thousands)	2035 Jobs (thousands)	Jobs Change 2012-2035	Percentage of staff Occupying	Net Jobs	Floorspace occupied per person	Floorspace Need, sqm
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			(thousands)	B1, B2, B8 Floorspace (percent)		(sqm)	
A:Agriculture, forestry and fishing	0.5	0.5	-	-	-	12	-
B:Mining and quarrying	0.0	0.0	-0.8	100	-	-	-
C:Manufacturing	4.4	3.6	-0.1	26	-800	47	-37,600
D:Electricity, gas, steam and air conditioning supply	0.1	0.0	0.1	26	-26	12	-312
E:Water supply; sewerage, waste management and remediation activities	0.1	0.2	1.8	26	26	12	312
F:Construction	6.4	8.2	0.2	0	47	12	564
G:Wholesale and retail trade; repair of motor vehicles and motorcycles	17.1	17.3	-	48	-	-	-
H:Transportation and storage	4.9	4.9	-0.2	-	-	70	-
I:Accommodation and food service activities	6.8	6.6	-	100	-200	-	-
J:Information and communication	1.5	1.5	-0.1	100	-	12	-
K:Financial and insurance activities	4.1	4.0	1.1	100	-100	12	-1,200
L:Real estate activities	1.3	2.4	3.2	100	1100	12	13,200
M:Professional, scientific and technical activities	4.3	7.5	2.2	100	3200	12	38,400
N:Administrative and support service activities	5.3	7.5	-2	22	2200	12	26,400
O:Public administration and defence; compulsory social security	9.1	7.1	-0.7	22	-440	12	5,280
P:Education	9.9	9.2	2.3	-	154	12	-1,848
Q:Human health and social work activities	18.0	20.3	0.9	-	-	12	-
R:Arts, entertainment and recreation	2.5	3.4	0.5	100	-	-	-
S:Other service activities	2.7	3.2	-	-	500	12	6,000
Total	99.3	107.4					

Source: Oxford Economics, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 90,156 sqm - 23.12 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: 40,960 sqm - 10.5 ha (at 3,900 sqm/ha)

Experian - 2012-2030

Sector	2012 Jobs (thousands)*	2030 Jobs (thousands)*	Jobs Change 2012-2030	Percentage of staff Occupying	Net Jobs	Floorspace occupied per person	Floorspace Need, sqm
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			(thousands)	B1, B2, B8 Floorspace (percent)		(sqm)	
Agriculture, Forestry & Fishing	0.4	0.6	0.2	5	10	12	120
Accommodation, Food Services & Recreation	9.3	11.6	2.3	-	-	-	-
Construction	6.2	7.9	1.7	26	442	12	5,304
Wholesale & Retail	16.6	17.7	1.1	-	-	-	-
Extraction & Mining	0	0.0	0	-	-	-	-
Finance & Insurance	4.4	4.2	-0.2	100	-200	12	-2,400
Information & communication	1	0.8	-0.2	100	-200	12	-2,400
Manufacturing	4.7	4.9	0.2	100	200	47	9,400
Professional & Other Private Services	12.5	16.9	4.4	100	4400	12	52,800
Public Services	38.2	39.1	0.9	22	198	12	2,376
Transport & storage	4.1	5.0	0.9	48	432	70	30,240
Utilities	0.3	0.2	-0.1	26	-26	12	-312
Total	97.7	108.9					

*Combines the data for 'Employee Jobs, broad sectors' and 'Self-Employee Jobs, broad sectors'
Source: Experian, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 90,840 sqm - 23.29 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: 5,112 sqm - 1.31ha (at 3,900 sqm/ha).

Experian - 2012-2035

Sector	2012 Jobs (thousands)*	2035 Jobs (thousands)*	Jobs Change 2012-2035 (thousands)	Percentage of staff Occupying B1, B2, B8	Net Jobs	Floorspace occupied per person (sqm)	Floorspace Need, sqm
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				Floorspace (percent)			
Agriculture, Forestry & Fishing	0.4	0.6	0.2	5	10	12	120
Accommodation, Food Services & Recreation	9.3	12.1	2.8	-	-	-	-
Construction	6.2	8.3	2.1	26	546	12	6,552
Wholesale & Retail	16.6	18.0	1.4	-	-	-	-
Extraction & Mining	0	0.0	0	-	-	-	-
Finance & Insurance	4.4	4.1	-0.1	100	-100	12	-1,200
Information & communication	1	0.8	-0.2	100	-200	12	-2,400
Manufacturing	4.7	4.9	0.2	100	200	47	9,400
Professional & Other Private Services	12.5	17.3	4.8	100	4800	12	57,600
Public Services	38.2	40.0	1.8	22	396	12	47,52
Transport & storage	4.1	5.2	1.1	48	528	70	36,960
Utilities	0.3	0.1	0	26	-	12	-
Total	97.7	111.4					

*Combines the data for 'Employee Jobs, broad sectors' and 'Self-Employee Jobs, broad sectors'
Source: Experian, 2015; HCA, 2010; BE Group, 2015

- From sectors predicted to grow: 115,384 sqm - 29.58 ha (at 3,900 sqm/ha)
- From sectors predicted to decline: 3,600 sqm – 0.92 ha (at 3,900 sqm/ha).

Appendix 8 – Developer Marketing Standards

A8.1 Where a sites' or premises' owner is applying to a Local Authority for change of use from employment to an alternative use, they have to prove there is a lack of demand for that site or premises.

A8.2 This table itemises the various marketing tools that should typically be used to market the interest.

A8.3 Should these tools fail to identify potential purchasers or occupiers then it may be considered that there is a lack of employment demand for the site or premises in question.

Marketing Tool	Premises	Site, 0-2 ha	Site, 2+ ha
On-site Marketing Board in prominent position	✓	✓	✓
Local Property Agent	✓	✓	✓
Regional Property Agent (joint or sole)	✓		✓
Liaise with Sefton Council	✓	✓	✓
Produce Marketing Particulars (in hard copy/PDF)	✓	✓	✓
Targeted mailing to Local/County/Regional Property Agents (Internet)	✓	✓	✓
Targeted mailing to Local/County/Regional Property Developers/Investors (Internet)	✓	✓	✓
Targeted mailing to UK Property Agents/Developer/Investors (Internet/postal)			✓

Marketing Tool	Premises	Site, 0-2 ha	Site, 2+ ha
Targeted mailing to selected potential occupiers (large local companies) (Postal)	✓	✓	✓
Advertise in Local/County/Regional Business Press		✓	✓
Advertise in UK Property Press			✓
Website	✓	✓	✓
Internet Mailing to Targeted Business Sectors (e-shot type mailing)	✓	✓	✓
Marketing Period, months	6-12	6-12	9-18

Source: BE Group, 2015