Employment Needs Assessment

Powys County Council

Report

July 2024

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1.0 INTRODUCTION

1.1 This Employment Needs Assessment has been prepared for Powys County Council by BE Group and Per Consulting. The Needs Assessment will form part of the evidence base for the preparation of the Powys Replacement Local Development Plan (RLDP).

1.2 The Employment Needs Assessment provides an assessment of the supply and demand for employment land in the County, looking at the available employment allocations and existing employment areas to understand the supply side and reviewing the property market, consulting with local stakeholders and forecasting employment growth to understand the demand side. The study has also reviewed candidate sites coming forward as part of the Call for Sites process.

1.3 The forecast period for the Employment Needs Assessment is 2022-2037.

1.4 The Needs Assessment, including forecasting and analysis, has excluded the Powys County area within the Brecon Beacons / Bannau Brycheiniog National Park area.

Methodology

1.5 Primary and secondary research techniques have been used in undertaking this update, including conversations with commercial agents, site inspections and reviewing national, sub-regional and local reports and strategies relevant to this study. The study also utilised Powys County Council's survey and database of employment sites and premises and annual monitoring information.

1.6 An analysis of the local property market has been undertaken, including a critique of the transactions of commercial premises in Powys, a review of currently marketed properties and an assessment of the types of demand and uses within employment areas. This data was complemented with information gathered from conversations with locally active commercial agents.

1.7 The Needs Assessment has reviewed the existing employment site allocations and existing employment areas through site inspections and referenced the Council's annual employment land monitoring and review of planning applications/permissions. The existing employment site allocations and existing areas have been catalogued and critiqued. Candidate sites put forward through the Call for Sites process that include proposed employment elements have also been reviewed for their potential to accommodate employment over the forecast period.

1.8 The employment land demand over the planning period has been forecast using reference to past employment land take-up data where available and employment forecasts by sector. This is consistent with Welsh Government Practice Guidance. A series of recommendations has been provided to guide employment land planning to 2037.

1.9 The foundational economy has also been reviewed, in particular its implications for employment land and jobs provision and need for services within rural areas.

Welsh Employment Land Review Guidance

1.10 This study reflects Welsh Government guidance on how Local Authorities should approach employment land reviews, namely *'Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan'* (August 2015). The employment land review process takes the form of a four-stage methodology under the following headings:

- **Stage 1: Property Market Assessment –** An analysis of demand in terms of specific market sectors, property requirements and geographical areas, focusing on the current situation and prospects for the LDP over its 15-year life cycle, including where there is demand for development and where there is not.
- **Stage 2: Audit of Employment Sites –** The quantitative inventory and qualitative appraisal of local land supplies, including existing committed, allocated and potential employment sites and existing stock. This will feed directly into the review's conclusions on whether any further land should be identified for employment and whether any existing or committed employment sites should be transferred to other uses.
- **Stage 3: Future Land Requirements –** Establishing the LDP's employment land requirement, using recognised forecast methods, primarily:
  - *"**Method 1 – Past Building Completions**: Method 1 uses the average annual completions rate for B1, B2, and B8 employment land for a previous period in order to project future requirements over the life of the LDP.*
  - ***Method 2 – Labour Demand Forecasting:** Method 2 involves acquiring employment growth forecast data for relevant Standard Industrial*

Classification (SIC, 2007) activity sectors, assigning sectors to B use classes and then converting jobs to floorspace."

- **Stage 4: Policy Options, Recommendations and Monitoring –** Identifying policy options and recommendations, based on review findings.

1.11 Table 1 shows how the Employment Needs Assessment aligns with this Guidance. The link between the report and the Planning Practice methodology is not always clear cut, with different sections overlapping, indeed certain steps overlap.

Table 1 – Employment Land Reviews – Practice Guidance

Stages	Covered in Sections
Stage 1: Property Market Assessment Step 1: Identify where demand and opportunities exist for development. Step 2: Identify where existing employment land is no longer in demand. Step 3: Establish property market profiles for offices, industry and warehousing.	3.0 Socio-Economic Profile 4.0 Property Market Assessment 5.0 Rural Economy *Demand assessment and market profiling, including consultations with local commercial agents. Consideration of cross-boundary issues affecting employment land provision.*
Stage 2: Audit of Employment Sites Step 1: Preparation of a quantitative site inventory Step 2: Preparation of qualitative site appraisals Step 3: Recommendations	6.0 Employment Land Assessment *Quantitative and qualitative site assessments*
Stage 3: Calculating Future Land Requirements Method 1 – Past Building Method 2 – Labour Demand Forecasting	7.0 Employment Land Forecasts *Review of completed Economic Development Evidence Base, allowing for updated LDP position*.
Stage 4: Policy Options, Recommendations and Monitoring Step 1: Policy Options Step 2: Policy Recommendations Step 3: Monitoring and Recording	8.0 Recommendations *Final reporting, including conclusions and policy/practice recommendations.*

Source: BE Group reporting response to Planning Guidance – Building an Economic Development Evidence Base Support a Local Development Plan

2.0 POLICY CONTEXT

Introduction

2.1 This section focuses on Welsh Government, sub regional and local reports and strategies that have a relevance to the allocation of employment land and premises within Powys. The strategies and reports reviewed below provides the context within which employment land planning and growth would be developed.

Welsh Government

Future Wales: The National Plan 2040, Welsh Government (2021**)**

2.2 This document replaces the Wales Spatial Plan and acts as the national development framework, guiding development and where investment should be in Wales to 2040. This framework will be built on by Strategic Development Plans at a regional level and LDP's at a local authority level, to identify the location of new development and infrastructure. This document supports and helps deliver the aims of the Welsh Government Economic Action Plan.

2.3 The prosperity of the country has been altered by the Covid-19 pandemic and therefore working patterns in terms of location and hours may change. Future Wales supports the provision of infrastructure to support these changing work patterns. Additionally, there is no 'one size fits all' approach to strengthening, diversifying and increasing the resilience of the Welsh economy meaning support must be given to new and existing businesses of all sizes.

2.4 11 Outcomes were created as overarching ambitions for Wales for the next 20 years which will link all policies together and describe '*A Wales where people live:*

1. *And work in connected, inclusive and healthy places*
2. *In vibrant rural places with access to homes, jobs and services*
3. *In distinctive regions that tackle health and socio-economic inequality*
4. *In places with a thriving Welsh language*
5. *And work in towns/ cities which are a focus and springboard for sustainable growth*
6. *In places where prosperity, innovation and culture are promoted*
7. *In places where travel is sustainable*

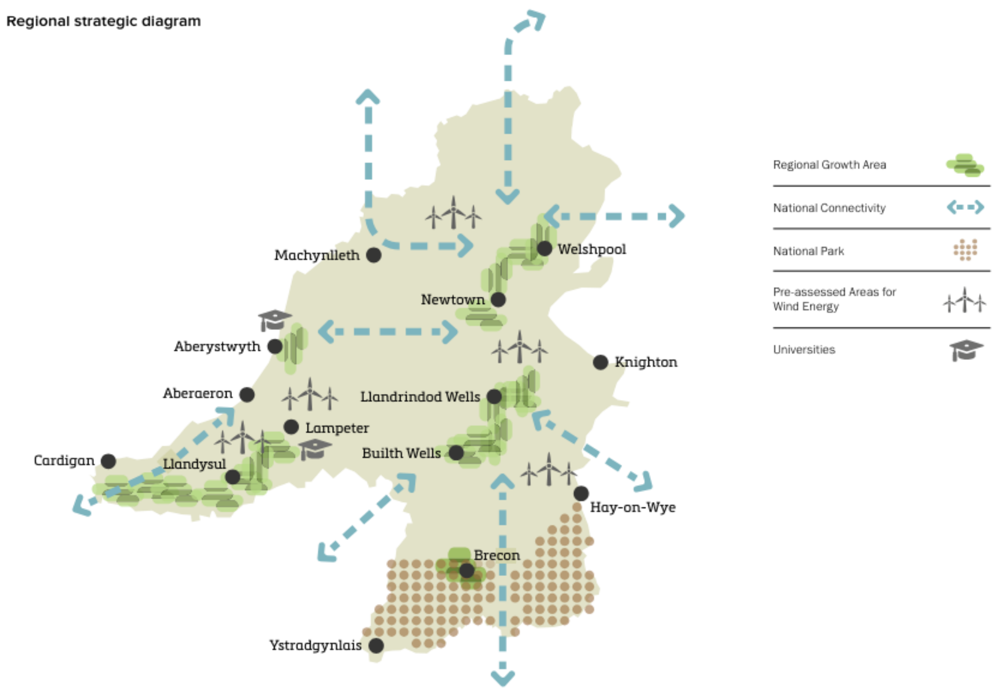
8. *In places with world-class digital infrastructure*
9. *In places that sustainably manage their natural resources and reduce pollution*
10. *In places with biodiverse resilient and connected ecosystems*
11. *In places which are decarbonised and climate-resilient*'.

2.5 Policy 1 states key areas for development with an aim to focus large scale growth on the urban areas, allowing productive agricultural land to be protected as development pressures are channelled away from the countryside. In particular, national and regional growth areas are defined within Policy 1. The Mid Wales region has five regional growth areas defined in Policy 1, which are:

- The Teifi Valley, including Cardigan, Newcastle Emlyn, Llandysul and Lampeter
- Brecon and the Border (partially within Powys)
- The Heart of Wales, including Llandrindod Wells and Builth Wells (within Powys)
- Bro Hafren, including Welshpool and Newtown (within Powys)
- Aberystwyth

2.6 The regional growth areas "*will grow, develop and offer a variety of public and commercial services at regional scale*." Future Wales includes the following strategic diagram to illustrate the regional growth areas in Mid Wales.

Figure 1: Mid Wales Regional Strategic Diagram



Source: Future Wales: The National Plan 2040

2.7 Policy 5 focuses on the rural economy with it being key to developing strong economies in order to support local enterprises. '*The presence of local rural businesses and employment opportunities can reduce the need for workers to travel long distances and reduce the reliance on larger economic centres*'. Strategic and Local Development Plans must plan positively to meet the employment needs of rural areas. Rural areas should develop a broad economic base to retain workers, broaden skills and help sustain the rural communities. Additionally, the changing work patterns of increased ability to work from home, and remotely from main offices, may result in a higher demand to live in rural areas.

2.8 Policy 25 summarises how the Future Wales's policies are applied in Mid Wales and states that Strategic and Local Development Plans adopt a managed growth approach for housing, employment and key services. It identifies Bro Hafren as supporting an existing advanced manufacturing cluster, which offers high value employment and productivity growth potential. The Heart of Wales, including Llandrindod Wells, Builth Wells and Rhayader are important historic towns which continues to attract visitors. Llandrindod Wells and Builth Wells are the epicentre of the Welsh agricultural sector. Knighton and Presteigne are important local centres of employment and services and link to the English marches. Ystradgynlais is the link between Mid Wales and Swansea and Neath Valleys. Policy 25 also states that "*opportunities for publicly-owned land to be used to demonstrate leadership through placemaking are strongly supported. Strategic decisions on the location of key services and infrastructure should support existing settlements and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations, support actions to address inequality and deprivation and improve links to neighbouring areas of Wales and England*."

2.9 Policy 26 (Growing the Mid Wales Economy) sets out that *'the region's wealth of outstanding natural assets, existing research capability and the growth potential of existing industrial clusters within the advanced manufacturing sector can support growth.'* Within the policy, the Welsh Government states its strong support for the development of the foundational economy in the Mid Wales region. The foundational economy is defined as *'those parts of the economy which are integral to the well-being of places, communities and people and which deliver people's everyday needs.'* Welsh Government believes Strategic and Local Development Plans should identify the role of the foundational economy, consider how the land-use planning system can support it and develop appropriate policies. *'Areas of the foundational economy which the planning system can support include regeneration initiatives, health and social care, social housing, tourism and steps to encourage greater community benefits from new development.'*

Building Better Places: The Planning System Delivering Resilient and Brighter Futures (2020)

2.10 This document, published in July 2020, set out the Welsh Government's planning policy priorities for the Covid-19 pandemic recovery period.

2.11 The Covid-19 Pandemic has emphasised the importance of having quality living and working environments and how much they matter as more flexibility is required to support new working, living and learning needs. Consequently, the Welsh Government is moving to ensure that when policies are being devised by all sectors in the environmental, social, cultural and economic recovery, placemaking is an important consideration.

2.12 This commitment to placemaking will help:

- Create and sustain communities
- Grow the economy in a sustainable manner

- Make the best use of resources
- Maximise environmental protection and limit environmental impact
- Facilitate accessible and healthy environments

2.13 The document outlined eight key issues that bring individual policy areas together to ensure action is the most effective. One of these issues is the case of revitalising town centre post covid and recognising the rise in online retailing. Consequently, the role and function of established shopping areas in town centres must be reassessed. Part of this will involve creating larger open spaces for people to socialise whilst feeling safe. Another part of this will involve bringing employment, commercial, community, leisure and public sector land uses into town centres in addition to retail.

2.14 In anticipation of homeworking becoming more prevalent across the country, ensuring strong mobile and broadband connections is another issue faced by planners. The Welsh Government recommends that planning applications for new digital infrastructure will be recognised as being essential to the Covid-19 recovery period in order to ensure areas that currently have poor internet coverage can become better connected.

2.15 A final issue recognised is the change in the future need for employment land due to changing working practices. The Welsh Government states that recent developments such as the Covid-19 pandemic and Brexit have the potential to impact requirements for future workspace. Consequently, economic forecasts will need to be re-examined frequently in order to ensure the supply of land for employment uses is adequate and fit for the future. Additionally, with the anticipated rise of homeworking flexible workplaces will need to be provided for remote workers to congregate together, share ideas and access office environments and facilities. The Welsh Government sees town centres as ideal environments for hosting these flexible workplaces.

Planning Policy Wales, 12th Edition – Welsh Government (2024)

2.16 Planning Policy Wales (PPW) 12th Edition, sets out the land-use planning policies of the Welsh Government. It is supplemented by a series of Technical Advice Notes (TANs). Together with several circulars and policy clarification letters, PPW and the TANs comprise the national planning policy for Wales. National planning policy, alongside Future Wales should be considered in the preparation of LDPs.

2.17 Chapter 5 '*Productive and Enterprising Places'* of PPW 12 sets out national policies for economic development. For planning purposes, the Welsh Government defines economic development as *"the development of land and buildings for activities that generate sustainable long term prosperity, jobs and incomes… Economic land uses include the traditional employment land uses (offices, research and development, industry and warehousing), as well as uses such as retail, tourism, and public services."* (para 5.4.1)

2.18 The document states the importance of the planning system supporting economic growth and ensuring that there is sufficient land to meet the needs of the employment market at both a strategic and local level. *"Development plans should identify employment land requirements, allocate an appropriate mix of sites to meet need and provide a framework for the protection of existing employment sites of strategic and local importance."* (para 5.4.3)

2.19 "*Wherever possible, planning authorities should encourage and support developments which generate economic prosperity and regeneration. Sites identified for employment use in a development plan should be protected from inappropriate development."* (para 5.4.4)

2.20 Plans and decisions need to be based on an up to date and locally/sub-regionally specific evidence base which demonstrates the *"suitability of the existing employment land supply as well as future provision in relation to the locational and development requirements of business."* (para 5.4.7) That evidence base should include an employment land assessment.

2.21 "*Planning authorities should work with each other and with relevant economic fora in order to prepare an ELR. The review should include an assessment of anticipated employment change and land use together with estimates of land provision for employment uses showing net change in land/ floorspace. This should be calculated for offices, industrial and warehouse uses separately. This evidence should help inform an economic vision for the area. Employment Land Reviews should be kept up to date and relevant to prevailing market conditions and the needs of the development plan."* (para 5.4.8)

2.22 In addition, local planning authorities should steer economic development to the most appropriate locations, including provision of strategic scale sites, by:

- Coordinating development with infrastructure provision
- Supporting national, regional and local economic policies/strategies
- Aligning jobs and services with housing (where possible) to reduce the need for travel, especially by car
- Promote the re-use of previously developed vacant and underused land
- Delivering physical regeneration and employment opportunities to disadvantaged communities
- Control and manage the release of unwanted employment sites to other uses
- Propose specific locations for locally and strategically important industries which are detrimental to amenity and may be a source of pollution
- Identify protection zones around land and premises that hold hazardous substances and protect the ability of existing businesses to operate or expand by preventing the incremental development of vulnerable uses in the locality.

2.23 Innovative business and technology clusters may also be important to the economic growth of a local authority area. Development plan policies need to identify potential networks and cluster areas, and set policies for the creation of the transport, environmental and telecommunications infrastructure needed to support such networks. Planning authorities should also look favourably on any renewable and low carbon energy generation proposals designed to serve clusters.

2.24 New business creation is essential to sustain and improve rural economies. *"Many commercial and light manufacturing activities can be located in rural areas without causing unacceptable disturbance or other adverse effects. Micro and small enterprises have a vital role to play in the rural economy, and contribute to both local and national competitiveness and prosperity*." (para 5.6.3)

2.25 Whilst some rural employment can be created through the re-use of buildings, new development may also be required. This new development should, where possible be within or adjacent to settlement boundaries and preferably close to public transport links. In addition, where businesses cannot be accommodated within settlements, appropriate small-scale rural enterprise should be permitted on unallocated land. The expansion of existing businesses located in open countryside should be supported provided there are no unacceptable impacts on local amenity.

2.26 "*Planning authorities should adopt a positive approach to diversification projects in rural areas… Whilst every effort should be made to locate diversification proposals so they are well-served by public transport, it is recognised that certain diversification proposals will only be accessible by car. While initial consideration should be given to adapting existing farm buildings, the provision of a sensitively designed new building on a working farm within existing farm complexes may be appropriate where a conversion opportunity does not exist."* (paras 5.6.10 & 11)

Technical Advice Notes – Welsh Government

2.27 These guidance notes and statements are intended to assist local authority policy makers in the preparation of LDPs. Of relevance to this study are TAN 23: Economic Development and TAN 6: Planning for Sustainable Rural Communities.

TAN 23: Economic Development (2014)

2.28 This TAN provides guidance on planning for economic development at a strategic level, identifying and assessing the economic benefits of development proposals and establishing an evidence base to support the economic development policies of LDPs.

2.29 Echoing PPW, the TAN advises that local planning authorities should aim to provide the land that the market requires (unless there are good reasons to the contrary). *"Local planning authorities should recognise market signals and have regard to the need to guide economic development to the most appropriate locations, rather than prevent or discourage such development."*

2.30 However, there may also be instances when planning authorities do not provide the land the market demands, in the places where the market demands it. Proposed developments or site allocations may be resisted because they would have unacceptable environmental impacts, divert demand from town centres or would go against agreed spatial strategies. In these circumstances planning authorities should look for alternative sites which offer the same, or very similar, advantages.

2.31 TAN23 recognises that a sequential test should be applied to economic development proposals or possible employment land allocations. First preference should be given to sites within the boundaries of settlements (including planned new settlements and urban extensions), then edge-of-settlement sites and finally land in the open countryside. Land may be identified in less preferable locations if the resulting benefits (i.e. jobs accommodated, alternatives, special merit) *"outweigh any adverse impacts of the development."*

2.32 Local authorities are encouraged to work jointly in sub-regional groups to prepare joint economy evidence bases, including an analysis of the sub-regional commercial and industrial property market. Such sub-regional strategies should also focus on identifying strategic sites of national and regional importance.

2.33 Where a planning authority is assessing a site allocation or planning application that could cause social or environmental harm, there are three issues which need to be considered:

- *"Alternatives: if the land is not made available (the site is not allocated, or the application is refused), is it likely that the equivalent demand could be met on a site where development would cause less harm, and if so where?*
- *…Jobs accommodated: how many direct jobs will be based at the site?*
- *…Special merit: would the development make any special contribution to policy objectives?"*

2.34 An example of a development of 'special merit' could be a greenfield development that could attract high-value, high-skill businesses that would not be interested in a lower-quality urban environment.

2.35 In rural areas, development may be acceptable in countryside locations if it makes communities more sustainable (encouraging people to work close to home), meets the expansion needs of an existing local business or an existing business cluster.

2.36 In producing LDPs, local planning authorities should:

- Develop a broad vision for the Plan which *"must be consistent and coherent so that the economic, social and environmental considerations support each other"*
- Set land provision targets which meet the market demand for land. Local authorities should work together to steer development to sustainable locations.

2.37 In terms of forecasting future growth, the TAN, echoing PPW, advocates "*a broad assessment of anticipated employment change by broad sector and land use".*

Specifically, this will require *"the preparation of possible future economic scenarios with plans developed in a way which ensures they are robust across the more likely scenarios and contain the flexibilities necessary to adjust to changing circumstances. The starting point for scenarios would normally be past trends at a regional level. Such scenarios could be adjusted to reflect different policy or demographic assumptions."*

2.38 The TAN accepts that such forecast modelling can often be imprecise – *"Models of future economic scenarios are surrounded by a large margin of uncertainty, and often more so for individual authorities than for larger areas. Modelling may be most successful when based on functional economic areas such as travel to work areas and housing market areas."*

2.39 Where projected local authority growth differs markedly from that expected for the wider region, *"the authority should provide an evidence-based justification for these differences, much as they would have to in respect of population projections for their area."* Predicted employment figures should usually be expressed as a range of scenarios to reflect different economic outcomes and policy options. Ultimately however, *"the level of growth envisaged must be realistic, able to withstand scrutiny and be consistent with the other aspirations of the plan including population and housing projections."*

2.40 Finally, the TAN highlights that existing employment sites should only be released for other uses if:

- *"They have poor prospects of being re-occupied for their previous use;*
- *And/or the particular market that the site is part of is oversupplied;*
- *And/or the existing employment use has unacceptable adverse impacts on amenity or the environment;*
- *And the proposed redevelopment does not compromise unduly neighbouring employment sites that are to be retained;*
- *Or other priorities, such as housing need, override more narrowly focused economic considerations."*

TAN 6: Planning for Sustainable Rural Communities (2010)

2.41 This TAN highlights that *"strong rural economies are essential to support sustainable and vibrant rural communities."* Development plans should facilitate diversification of the rural economy, accommodating the needs of both traditional rural industries and new enterprises, whilst minimising impacts on the local community and the environment.

2.42 Meeting the economic needs of rural communities will require the provision of a diverse range of employment sites. Where possible such sites should be located within or adjacent to settlements. A rural employment exception policy may also be required, setting out the criteria against which planning applications for employment use on the edge of settlements, on sites which are not specifically allocated in the development plan, will be assessed. The expansion of existing rural businesses, including businesses that are in the open countryside should be supported, providing there are *"no unacceptable impacts on local amenity."*

2.43 If there is a shortfall of employment land in the local authority area then planning authorities should resist development proposals that could result in the loss of employment sites, unless the applicant puts forward land or property of equivalent or greater employment value.

2.44 Planning authorities should also encourage the growth of self-employment and micro businesses by supporting home working. Planning applications for employment premises at home should be supported and development plans should identify new opportunities for home/work developments.

2.45 Farm building conversions to employment uses and sensitively located and designed new builds for employment will often be appropriate in rural areas. Appropriate uses at such locations could include food and timber processing and packing, services (offices, workshop facilities, equipment hire and maintenance), sports and recreation services, the production of non-food crops and renewable energy.

Development Plans Manual, Edition 3, Welsh Government (2020)

2.46 The Development Plans Manual is a reference document for the preparation and implementation of development plans. It contains practical guidance on how to prepare, monitor and revise a development plan, underpinned by robust evidence to ensure that plans are effective and deliverable and contribute to placemaking.

2.47 The Manual highlights that *"while there is not always a direct correlation between jobs and homes, they need to be considered collectively when assessing growth levels and developing a sustainable strategy; the aim being to achieve a balance between homes and jobs thereby reducing the need for commuting. The scale of economic growth to be delivered in a plan will be strongly influenced by the available labour force, skills, net migration levels, commuting patterns, housing provision and infrastructure. Links to the regional and sub-regional context should also be considered, taking account of functional linkages and geographical synergies between places to achieve better planning outcomes*."

2.48 The scale of economic growth and housing expressed in the plan should be a judgement between the unconstrained need against supply factors which constrain the ability of the plan to deliver, resulting in adjusted growth levels and the requirement of the plan.

2.49 The level of unconstrained need is based on current levels of need/demand at a point in time, i.e., the current/baseline situation (homes and jobs), as demonstrated by evidence. "*Trend based forecasts quantify a variety of outcomes, based on a series of assumptions, extrapolating the level of need forward to cover the whole plan period. The forecasts used should relate directly to the range of issues and land uses the plan is seeking to address, for example changes in population and the need for additional homes to accommodate this change."*

2.50 Once the total need, unhindered by any constraint has been determined, i.e., the unconstrained need, LPAs will then have to consider what constraints may apply that would influence the level of need, supply factors.

2.51 *"It is crucial how these two elements are considered, balanced and evidenced to identify the plan requirement. There should be a strong link between the scale of growth set out in the requirement, the overall vision of the plan and delivering on the key objectives. It would not be prudent for an LPA to consider maximising economic* *prosperity but reducing the supply of housing to a level which will not generate a sufficient labour force to fulfil the employment needs. Similarly, there should not be housing without jobs; a balance needs to be achieved within the development plan strategy."* Table 2 summarises the need and supply factors which relate to employment land reviews.

Table 2 – Employment Need and Supply Factors

Demographic and Need Based Considerations	**Trends Based Considerations**	**Delivery Considerations and Constraints**	**Policy Based Considerations**
NEED AND DEMAND FACTORS		**SUPPLY FACTORS**	
Latest Population and Household Projections (Welsh Government Latest) • Working age profile • Economically active • Migration rates • Age profile **Employment Land Review** • Identification of existing employment sites • Identification of existing employment land/jobs by use class, broken down into SIC code • Job growth (if appropriate) • Forecast growth or decline in Class B and other employment land uses • Need for a buffer to act as a flexibility allowance National and regional economic growth strategies Generate growth forecasts for non-Class B employment uses	LDP - AMRs Unemployment rates (comparison to local, national and UK averages) Commuting patterns and rates Level of self- employment and home based working, plus potential trends 'Churn' and replacement of existing employment units Vacancy rates and surplus of sites/premises by type and sector Delivery of employment land / take up linked to past build rates - What is employment take up over different periods, e.g., 5, 10, 20 and 25 years? Current and future demand for employment sites by type / sectors including rural economic growth Development on Enterprise Zones	Role and function – capacity (physical, social and environmental) at places to accommodate growth Infrastructure capacity and costs Site availability and deliverability including phasing National environmental constraints – e.g., flooding, contamination and European designations Developer type/ capacity/potential to deliver growth levels – e.g., competition between sites with similar market offers in neighbouring LPAs Access to markets and end users Skill set of local workforce Land values Overage / claw back clauses (e.g., payment of a financial sum upon commencement of development)	Alternative demographic scenarios: • Target increase in working age profile and economically active • Changes to migration assumptions – e.g., rates of in/out migration linked to economically active Settlement hierarchy and settlement boundaries Number and level of jobs proposed – e.g., specialist and local Scale and location of new employment sites (key / local) - B1, B2, B8 including: • Identification of Enterprise Zones • Safeguarding of key existing employment sites • Loss of employment land to alternative uses Relationship to housing growth

Source: Development Plans Manual, Welsh Government, 2020

Practice Guidance: Building an Economic Development Evidence Base to Support a Local Development Plan – Welsh Government (2015)

2.52 This Practice Guidance provides a methodology for local planning authorities (LPAs) to help meet national planning policy requirements, and to *"produce robust evidence bases to underpin sound plans and development management decisions."* The guidance aims to *"address common technical problems and help achieve greater consistency in the approach to collecting data across Wales."* LPAs may choose to depart from or add to the methods contained in the practice guidance but in doing so need to make clear *"the reasons for their preferred methodology in their evidence base studies and LDP as the outputs should be robust enough to withstand scrutiny along with other supporting evidence for LDPs."*

2.53 Chapter 4 establishes that the ELR is an integral part of establishing an evidence base to support the strategies and policies of an LDP. *"While ELRs have typically been conducted, and deal with data, at a local authority level, PPW and Technical Advice Note (TAN) 23 strongly support joint studies with neighbouring authorities where this is practicable. The information collected in the ELR study will also help inform the more strategic assessment of economic development taking places at a larger than local level."*

2.54 The ELR includes four stages. *"The Employment Land Review is essentially a two-part process, an appraisal of the present situation (stages 1 & 2) followed by an assessment of future needs (stages 3 & 4):*

- *Stage 1: Property Market Assessment*
- *Stage 2: Audit of Employment Sites*
- *Stage 3: Future Land Requirements*
- *Stage 4: Policy options and recommendations."*

Prosperity for All: Economic Action Plan – Welsh Government (2017)

2.55 The purpose of the Economic Action Plan is to support delivery of Prosperity for All – the National Strategy for Wales. The Plan sets out a vision for inclusive growth, built on strong foundations, supercharges industries of the future and productive regions. The Plan drives the twin goals of growing the economy and reducing inequality.

2.56 Underpinning the Economic Action Plan is a proposed new Economic Contract between government, business and partners in Wales. "*This will frame the reciprocal relationship between Government and business and drive public investment with a social purpose*." The Economic Contract will be applied to Welsh Government's direct financial support to business. Government will explore extending the contract to include the wider offer to business and the adoption of these principles by the rest of the public sector in Wales. The Economic Contract will require businesses seeking investment from Welsh Government to demonstrate all of the following as a minimum requirement:

- Growth potential (measured for example, by contribution to employment, productivity, or multiplier effects through the supply chain)
- Fair Work (as defined by the Fair Work Board)
- Promotion of health, including a special emphasis on mental health, skill, and learning in the workplace
- Progress in reducing carbon footprint.

2.57 Businesses seeking financial support from the Welsh Government will contribute to at least one of the Calls to Action proposed in the Economic Action Plan:

- Decarbonisation
- Innovation, entrepreneurship and headquarters
- Exports and trade
- High quality employment, skills development and fair work
- R&D, automation and digitalisation.

2.58 Each of the four regions across Wales benefits from its own distinctive opportunities and challenges and the report advocates more effective regional collaboration in order to lead to better outcomes. *"We will introduce a new regionally focused model of economic development. We will bring greater coherence through the work of our Chief Regional Officers who promote regional interests and issues in Welsh Government to tailor delivery on a broad range of issues. Our regional footprint is consistent with our local government reform agenda and those used by the Regional Skills Partnerships."*

Smarter Working: a Remote Working Strategy for Wales - Welsh Government (2022)

2.59 This strategy document outlines the Welsh Government's approach to achieving 30 percent of the Welsh workforce working at or near to home in this Senedd term (2021-2026). The vision is to embed a culture that supports remote working in the workplace. The vision states that Welsh Government wants to:

- "*see 30% of the workforce working remotely on a regular basis*
- *work in partnership with employers, workers, trade unions and others to support a shift to more people working remotely, helping them to build on progress made during the pandemic and better understand the benefits of remote working*
- *take action against climate change by reducing the need to travel thereby reducing greenhouse gas emissions associated with transport*
- *improve air quality by reducing congestion and softening rush hour peaks*
- *create inclusive workplaces in our local communities that have equality at the heart of decision making*
- *promote a hybrid workplace model of office, home and local hubs to enable people to live and work in their local communities*
- *increase opportunities for more fair work and promote well-being and worklife balance in the Welsh workforce.*"

2.60 The strategy states that the Welsh Government will take a leading role in remote working with no more than 50 percent of its workforce working from a central office at any one time.

2.61 The strategy includes an outline of benefits and risks that could potentially arise from this policy. This includes recognition that such a policy may change how city and urban centres are used. The document cites a study that suggests that there may be a shift in footfall from city centres to the suburbs as workers spend more time in their local area. It considers that city centres will survive through adaptation but that monitoring will be required.

2.62 Of relevance to the forecasting of employment land requirements, it is noted that this is likely to be most applicable for office based workers, either in B1 office spaces or hybrid spaces (mix of B2/B8 with B1 offices). Furthermore, historically the public sector is a significant landholder and occupier of employment spaces in Powys and the intent to take a leading role in remote working has the potential to impact on demand for employment spaces in the planning period.

The Labour Market of Tomorrow – Jobs, Skills and a Transition to a Green Economy - Data Cymru (2022)

2.63 This document was produced by Data Cymru on behalf of the Regional Skills Partnerships (RSPs) in Wales in order to provide them with an understanding of the jobs and skills challenges associated with the transition to a low-carbon economy.

2.64 The report looks at the green economy in terms of:

- *"New green economic activity – Using technologies or practices that previously did not exist. For example, the introduction of hydrogen fuel cells.*
- *The 'greening' of existing jobs – In which existing jobs are transformed entirely into green jobs. For example, oil drillers will have to retrain to become part of the renewable energy supply chain.*
- *The part 'greening' of existing jobs – Where a component of an existing job may need some new 'green' skills or knowledge. For example, automotive engineers will have to be skilled at servicing internal combustion-engined cars as well as electric cars."*

2.65 The report monitored the number of green job postings in the Mid Wales region between January 2021 and December 2021. The job posting that appeared most often in the region over the period was Environmental Health Officer with six unique postings, followed by Environmental Health and Safety Manager, Environmental Coordinator and Environmental Administrator, each appearing five times. In terms of Occupation (SOC), Health and Safety Officers and Environmental Professionals appeared most often, with 12 and nine unique job postings respectively. Therefore, based on this report's metrics, most job postings at the time of the report were more concerned with environmental health, monitoring and management, rather than value-added jobs in the green economy, including using green technologies or practices or moving existing occupations to green practices. However, based on job ad titles and descriptions, it can be difficult to fully capture jobs in green sectors.

2.66 The paper concluded that it was difficult to provide more clarity on specific skills required for the future due to the lack of data available on the topic. They recommended a series of actions that RSPs should consider in order to inform their ongoing strategies on green skills, which included:

- *Continue to monitor green job postings in the regions*
- *Continue to engage with the RetroFit agenda and speak to relevant sectors*
- *Monitor the developments of the South Wales Industrial Cluster in the medium to long-term*
- *Respond to new green infrastructure projects*
- *Engage with government research and forecasters*
- *Engage with sector representatives and education providers on green issues*
- *Develop a system to collect data on an ongoing basis.*

Regional (Mid Wales)

Strategic Economic Priorities for the Mid Wales Region (2019)

2.67 Growing Mid Wales Partnership published the Strategic Economic Priorities for the Mid Wales Region to 2033. The document underpinned Mid Wales's ambition to secure a Growth Deal that can drive economic growth across the region while also supporting the delivery of the UK and Welsh Government's aspirations for economic growth.

2.68 The priorities were aimed at achieving three objectives;

- Objective 1 - An Innovative and Skilled Mid Wales
- Objective 2 - A Competitive and Sustainable Mid Wales
- Objective 3 - A Connected and Distinctive Mid Wales

2.69 Aimed at achieving Objective 1, the document identifies as a high priority that Mid Wales has a University Centre or Centres to improve access to higher education in Mid Wales.

2.70 Aimed at achieving Objective 2, the document outlines an investment programme in key strategic employment sites to be a transformational priority as the area is limited by a lack of modern building stock especially start-up and smaller premises. High priority is given to the provision of an innovative and targeted employment sites and premises investment package. This would include funding for infrastructure and would be aimed at encouraging more speculative development as *'there is little or no significant private sector investment in Mid Wales.'*

2.71 The document also makes the comment that the currently limited information on the supply and demand of employment land is obstructing the development of a more strategic approach to targeting investment. While it also makes the comment that '*the region experiences wide geographic variations in the performance of its commercial property market. Existing employment land allocations have been largely built out in areas of high demand, such as the Severn Valley, and as a consequence new land allocations will need to be considered.'*

2.72 Aimed at achieving Objective 3, the document deemed the provision of enterprise and innovation centres (Gigabit Hubs) in key settlements to be a transformational priority. Gigabit Hubs would improve digital connectivity as well as economic growth and community cohesion. Gigabit Hubs would also encourage entrepreneurship and innovation within its residents and businesses and therefore was also considered a high priority action for achieving Objective 1.

Mid Wales Region Employment Sites and Premises Needs and Action Plan – Stages 1, 2 and 3 (2020/2021)

2.73 This document was prepared by BE Group, Hatch and Per Consulting on behalf of Ceredigion and Powys County Councils, Brecon Beacons National Park Authority (now Bannau Brycheiniog) and Welsh Government. The report was commissioned due to the fact that the Mid Wales economy was lagging behind UK and Welsh averages and therefore a strong action plan was required to support employment growth in the region. The Plan was split up into three stages with Stage One providing an employment sites and premises assessment, Stage Two being an Action Plan and Stage Three being an outline business case to support the Mid Wales Growth Deal.

Stage One – Assessment of Employment Sites and Premises

2.74 During this stage, it was assessed that there was 57.21 ha of developable land across the Mid Wales region including 30.44 ha in Powys, 23.66 ha in Ceredigion and 3.08 ha in the Brecon Beacons National Park. Table 3 shows that the majority of the sites were less than 2.0 ha, thus limiting the development potential of the sites.

Table 3 – Land Allocations by Employment Use (realistic supply)

Area	<0.5ha	0.5-0.99ha	1.0-1.99ha	2.0-4.99ha	5.0-9.99ha	10.0+ ha
Powys	0 (0)	1.90 (3)	9.75 (7)	12.79 (5)	6.0 (1)	0 (0)
Ceredigion	0.29 (1)	0 (0)	1.78 (1)	21.59 (7)	0 (0)	0 (0)
Brecon Beacons	0.58 (2)	1.10 (2)	1.40 (1)	0 (0)	0 (0)	0 (0)
Total	**0.87 (3)**	**3.00 (5)**	**12.93 (9)**	**34.38 (12)**	**6.0 (1)**	**0 (0)**

Source: BE Group analysis of sites, 2020

** does not include sites with no realistic supply of employment land*

2.75 The report found that there were some areas within Mid Wales with no or limited supply of available employment land, significantly limiting growth potential. In particular, the following have been identified from this analysis:

- **Newtown** had only one 2.0 ha site, which was very limited for one of the key employment nodes in Mid Wales, although there was scope to increase the site area if constraints were addressed.
- **Welshpool**, as another key employment node, had more available land than Newtown, though limited to two locations, one of which had a narrow market appeal.
- **Llandrindod Wells** had two sites, including a reasonable amount of space at Heart of Wales Business Park (2.09 ha) and a remnant site within Ddole Road Industrial Estate (0.69 ha). These sites were allocated and vacant for many years and had no obvious physical development constraints, though had not come forward.
- The south-east areas, including **Presteigne** (1.01 ha), **Knighton** (0), **Hay-on-Wye** (2.4 ha) and **Talgarth/Three Cocks** (3.83 ha) had limited opportunities for growth.
- **Brecon** only had two remnant parcels within existing employment areas to accommodate further growth, both of which were small sites. There was a need for additional land to accommodate current and future needs.
- At **Machynlleth,** the vacant site was neighbouring to Treowain Enterprise Park and provided an opportunity for the further growth of employment in this locality.

2.76 The report utilised the following approaches to forecast future employment land requirements within Mid Wales for the 2019-2040 period:

- Model One – extrapolation of past take-up rates of employment land

- Model Two Baseline – assessment of demand based on baseline employment forecasts
- Model Two Policy On – assessment of demand based on Policy On employment growth scenario.

Table 4 – Comparison of Employment Land Supply and Demand

		Land Requirement 2019-40 (ha) including Five Year Buffer					
		Model One		Model Two			
Area	**Realistic Employment Land Supply (ha)**	**Demand**	**Supply minus Demand**	**Baseline Demand**	**Baseline Supply minus Demand**	**Policy On Demand**	**Policy On Supply minus Demand**
Ceredigion	23.66	23.4	0.26	2.46	21.20	3.73	19.93
Powys	30.44	33.8	-3.36	6.52	23.92	10.42	20.02
Brecon Beacons	3.08	5.3*	-2.22	1.40	1.68		

Source: BE Group analysis, 2020

2.77 The preferred approach adopted was the Model One (past take-up) approach. Consequently, it was estimated that the demand for employment land in Mid Wales to 2040 is 62.5 ha (including buffer and including Brecon Beacons National Park areas within Mid Wales). This figure is made up of a need for 33.8 ha in Powys, 23.4 ha in Ceredigion and 5.3 ha in the Brecon Beacons.

Stage Two – Action Plan

2.78 This stage focused on the interventions necessary to stimulate the regional commercial property market and bring forward an appropriate range of employment sites and premises to meet the needs of the regional economy and, in particular, new, innovative and growth-oriented business sectors. Additionally, the Action Plan provided direction on addressing the key market factors identified in the Stage One report that included:

- *The socio-economic challenges contributing to significant projected depopulation of the region.*
- *The endemic commercial market failure due to the significant viability challenge and constraint in bringing commercial sites and premises forward for business occupation.*
- *The need for investment to bring the existing stock of commercial premises up to modern standards and the challenge of achieving this given the fragmented and largely private sector ownership of leased property.*

- *The limited supply of sites in the market, particularly in areas of existing high demand.*
- *The need to provide an appropriate mix of commercial premises to meet business requirements and facilitate future economic growth.*
- *The need for appropriate employment sites and premises for emerging growth sectors.*

2.79 The Action Plan identified a number of recommended actions for local employment sites as well as strategic and sectoral interventions. Recommended actions for local employment sites included continuing to promote plots for private sector development, engaging with landholders, site servicing and infrastructure provision as well as improving the general appearance of sites through landscaping.

2.80 In terms of strategic interventions, the key priority employment sites that were identified are shown in the table below.

Table 5 – Strategic Intervention Sites

Priority	Site
Powys	
1	Llanidloes Road, Newtown
2	Offa's Dyke Business Park Extension, Welshpool
3	Mid Wales Sustainable Technology Park (potentially also could be located in Ceredigion)
4	Land adj. Gwernyfed Avenue, Three Cocks
5	Abermule Business Park, Abermule
6	Heart of Wales Business Park, Llandrindod Wells
Ceredigion	
1	Aberystwyth Innovation & Enterprise Centre, Aberystwyth
2	Horeb Business Park, Llandysul
3	Parc Teifi Cardigan
4	Aberystwyth candidate sites: Llanbardarn Fawr Campus Penglais & Frongoch Farm Wern Phillip Farm
Brecon Beacons NP	
1	Cwrt y Gollen
2	Brecon Beacons Enterprise Park, Brecon

Source: Stage 2 report, 2021

2.81 The following list sets out the sectors targeted with interventions as well as the associated objective of the intervention:

- *High Value Manufacturing - To support and enhance the existing manufacturing strengths and ensure sector can take advantage of emerging opportunities*

- *Food and Beverage - To broaden and enhance this sectoral strength of Mid Wales.*
- *Tourism and Hospitality - To broaden the tourism and hospitality offer in Mid Wales.*
- *Sustainable Technologies - To support and develop this industry and ensure that the benefits are retained within Mid Wales*
- *Defence and Security - To support the industry, including its current strengths and emerging opportunities*
- *Skills - To ensure that the labour force of today and in coming years has appropriate skills to meet local business needs.*
- *Energy - To increase capacity and resilience of energy supply in Mid Wales*
- *Infrastructure - To deliver sufficient infrastructure to support targeted growth in business development*

Stage 3 – Business Case

2.82 Stage three involves the scoping of an **Outline Business Case** for a Mid Wales Property Infrastructure Investment Fund. The document put forward strategic, economic, commercial, financial and management cases.

2.83 The strategic case proposed a strategic portfolio programme of direct public investment proposed to secure the delivery of essential employment property and infrastructure. The programme was designed to meet the demand, outlined in Stage One, for approximately 12,000 sqm of speculative property between 2020 and 2025, and an additional 13,000 sqm in the subsequent five-year period to 2030. The estimated public investment needed was around £20.5 million in the first five years and £17.1 million in the second period, excluding land purchase costs. Specific investments are outlined for different locations and property types in the table below.

Table 6 – Potential Public Sector Investment in Employment Space

	2020-2025	2025-2030
Aberystwyth		
B1(b) R&D Space	£8.0m	£8.0m
B1(c) Light Industry	£3.5m	
Llandysul		
B2 Food Units	£3.0m	-
Newtown		
B1(c) / B2 Industrial	£3.5m	£3.5m
Welshpool		
Land/Site Prep	£2.5m	
B1(c) / B2 Industrial	-	£5.6m
	£20.5m	**£17.1m**

Source: Stage 3 report, 2021

2.84 The Economic Case stated that the delivery of approximately 12,000 sqm of new property development between 2020 and 2025 could generate around 276 new jobs and contribute £7.7 million of economic value per year (or £77 million over a typical ten-year duration) to the Mid Wales region. Based on an initial investment fund of £20.5 million, this represents a gross Benefit Cost Ratio (BCR) of 3.7:1.

A Vision for Growing Mid Wales - Strategic Economic Plan & Growth Deal Road Map (2020)

2.85 This document, mainly written prior to the Covid-19 Pandemic, was produced by Growing Mid Wales and is divided into two sections. The first section sets out the economic strategy for Mid Wales which will drive the overall approach to economic improvement for the region and will be used to maximise the widest range of funding opportunities available. The second section of the document sets out the approach to bring forward a Growth Deal with Welsh and UK Governments, leading to a Heads of Terms by the autumn of 2020. The document was developed in partnership with representatives of both Governments to ensure the approach is robust, proportional and realistic.

2.86 Within the strategy, the document makes the following comments regarding employment land, *'The employment sites and premises market in Mid Wales differs from adjacent regions. Most of the demand is from businesses already established in the region. There are significant geographic variations with sub-market areas such as Aberystwyth, the Severn Valley and Brecon experiencing higher demand and an identified gap in serviced sites. This compares to more remote rural locations, some of which have seen little or no development take place over recent years. There is a* *recognised lack of availability and investment in modern and technical employment premises across the region with low levels of speculative development and issues of commercial viability in provision. Market failure drives an estimated viability gap of ~60%, with further detailed work ongoing to establish a case for regional investment.'*

2.87 The strategy details eight strategic growth priorities which include Agriculture, Food and Drink, Applied Research and Innovation, Strengthened Tourism Offer, Energy, Supporting Enterprise, Digital, Transport and Skills and Employment.

2.88 Within the 'Supporting Enterprise' priority, Growing Mid Wales state they want to enable business growth and in order to achieve this objective, the following needs to happen:

- *Strategic Business Innovation Sites: invest in a small number of high-quality employment sites and centres of excellence in target sectors (eg. agri-tech, high value manufacturing, food innovation & low carbon).*
- *Mid Wales Business Growth Incubation Network: build on existing provision to deliver high quality shared business accommodation targeting start-ups and micro enterprises providing business support, professional services, networking, training, gigabit digital connectivity, flexible terms, co-location etc.*
- *Develop and implement a Mid Wales Employment Sites & Premises Action Plan that would deliver the following outputs;*
    - *A regional portfolio of good quality business incubation units and grow on space for start-up and micro enterprises*
    - *An advanced build programme of good quality commercial property for SMEs*
    - *Allocation and servicing of next generation employment sites*
    - *Commercial property refurbishment / energy efficiency renewable energy financial incentive scheme*
    - *Accelerated Property Infrastructure Fund*

2.89 The second section outlines the intended roadmap to bring forward a Growth Deal for Mid Wales. It also states that the Growth Deal proposals consist of three inter-connected and mutually dependent Programmes:

- ***Broadening our Economy**: Developing new opportunities from our assets – focusing on high value and growth supporting opportunities*

- ***Strengthening our Economy**: Supporting our existing industries and workforce to become more resilient through capacity building and creating the right conditions for future growth*
- ***Connecting our Economy**: Improving digital and connectivity within, across and outside the region to ensure the region is attractive to work, live and play.*

Mid Wales Regional Economic Framework

2.90 This document developed by Welsh Government in collaboration with stakeholders across the region and will help support a more regionally-focused model of economic development. The Framework gives a high level assessment of where Mid Wales is currently and the agreed vision for Mid Wales to:

- *"be more enterprising and distinctive region*
- *deliver economic growth driven by innovation, skills and connectivity*
- *create more productive jobs supporting prosperous and bilingual communities"*

2.91 The region's eight economic priorities include Agriculture, Food and Drink, Applied Research and Innovation, Strengthened Tourism Offer, Energy, Supporting Enterprise, Digital, Transport and Skills and Employment.

Local

Powys County Council Economic Development Strategy (2016)

2.92 The Economic Development Strategy was developed in order to help achieve the Council's vision for the future as well as improve Powys' economy. The document forms part of the Council's Regeneration Strategy, with 'The Economy' being one of the strategy's nine key themes.

2.93 The strategy described a re-calibration of the Council's current regeneration towards economic development to encourage a more thriving economy with a suitable range of jobs for Powys' citizens. The four objectives of this strategy are:

- Grow Powys' strategic business sectors
- Attract new business
- Increase visitors and visitor spend
- Increase Powys' economically active population.

2.94 Additionally, specific ideas emerged from discussions within the Council, with eleven ideas being settled upon, including:

- *"Digitally enabled Powys - working to enable the facilitation of superfast broadband solutions and better mobile coverage for our businesses and communities*
- *Working with Welsh Government (WG) and partners to actively market Powys as a place to live and to move your business and deliver an infrastructure to promote Powys – actively pursuing all opportunities to engage and encourage WG to market sectors important to Powys and to lobby for better infrastructure. Work with partners (e.g. Grow Mid Wales with Ceredigion, Marches Local Enterprise Partnership etc.)*
- *Pursue investment funding from central UK and Wales government through MPs - engineering through our Westminster MPs opportunities for central government funding for developing our existing economy, inward investment and better infrastructure.*
- *Exploiting our long borders – taking better advantage of our long borders, encourage business and people to move to Powys and also work with our neighbours in both England and Wales on common issues.*
- *Continuous marketing campaign - coordinating and pursuing all opportunities for exposure of Powys. Encouraging back young people who have left for further/higher education.*
- *Marketing Powys as an events and festivals destination – pursuing marketing campaigns to encourage event organisers and visitors to Powys. Exploit opportunities to promote the Welsh culture and language to give visitors a unique experience.*
- *Marketing Powys as a destination for outdoor activities – pursuing marketing campaigns to encourage visitors to Powys to try a whole range of outdoor activities – linking in with Visit Wales' annual campaigns which encourage event organisers and visitors to Powys (Year of Adventure in 2016 and Myths & Legends in 2017 etc.).*
- *Skilful workforce – encouraging and facilitating the skilling of our youngsters for those sectors that will make a difference to Powys particularly for innovation, technology and enterprise. Also encouraging our existing workforce to make it more resilient in the face of economic change.*
- *Major development exploitation protocol – develop a Major Development Exploitation Protocol across the council to maximise the potential from*

significant investment projects that can benefit Powys to create jobs, grow associated business, increase our apprentices, boost our housing market, encourage tourism and train our youngsters in order to be able to offer a relevant workforce.

- *Powys Business Advocates network - hosting a network of influential business people in Powys in order to harness their efforts to bring business to Powys (business brings business) and to help grow our existing business from micro to small and beyond.*
- *Marketing Powys as a place to do business and invest - promote Powys as a place for growing business, attracting the best companies and supporting enterprise through excellent business support services and strong supporting infrastructure."*

Powys Adopted Local Development Plan (2018)

2.95 The Powys Local Development Plan was adopted by Powys County Council on the April 17th 2018 for the 2011-2026 period and sets out the vision for future development in the Plan area.

2.96 Strategic Policy SP2 made provision for 45 hectares of employment land, comprised of 39 hectares of new B1, B2 and B8 employment development and 6 hectares of employment land within mixed use sites, allocated in accordance with policies E1 and E3. Details of the employment and mixed-use allocations are included in Tables 7 and 8 below.

Table 7 – Employment Proposals on Allocated Employment Sites (Powys Adopted LDP)

Site Name	Location	Size of Employment Development Area (ha.)	Category	Site Allocation Ref. No.
Ystradgynlais				
Woodlands Business Park	Ystradgynlais	2,31	High Quality	P58 EA1
		2.31		
Central Powys				
Wyeside Enterprise Park	Builth Wells	1.2	High Quality	P08 EA1 / P08 EC1
Heart of Wales Business Park	Llandrindod Wells	3.9	Prestige	P28 EA1
Broadaxe Business Park	Presteigne	2.4	Local	P51 EA1
Brynberth Enterprise Park	Rhayader	3.7	Local	P52 EA1
		11.2		
Severn Valley & North				
Parc Busnes Derwen Fawr	Lllanidloes	1.2	High Quality	P35 EA1
Parc Hafren	Lllanidloes	1.7	Local	P35 EA2 / P35 EC1
Llanidloes Road	Newtown	2	High Quality	P48 EA1
Abermule Business Park	Abermule	2.6	High Quality/Local	P02 EA1
Church Stoke	Church Stoke	1.28	Local	P12 EA1
Buttington Cross Enterprise Park	Welshpool	1.5	Prestige	P57 EC1
Buttington Quarry	Trewern	6	Local	P59 EA1
Offa's Dyke Business Park	Welshpool	7.3	Prestige	P60 EC1
Four Crosses	Four Crosses	0.5	Local	P18 EA1
		24.08		
Machynlleth				
Treowain Enterprise Park	Machynlleth	1.7	High Quality	P42 EA1
		1.7		
Total		**39.29**		

Source: Powys Adopted LDP (2018)

Table 8 – Mixed Use Proposals on Allocated Employment Sites (Powys Adopted LDP)

Site Name	Location	Size of Employment Development Area (ha.)	Category	Site Allocation Ref. No.
Central Powys				
Gypsy Castle Lane	Hay-on-Wye	2.4	Mixed Use	P21 MUA1
Land adj. Gernyfed Avenue	Three Cocks	3.4	Mixed Use	P53 MUA1
Total		**5.8**		

Source: Powys Adopted LDP (2018)

Powys County Council Employment Needs Assessment (2012)

2.97 Powys County Council commissioned an Economic Needs Assessment in August 2011 (completed October 2012) in order to inform the Adopted Local Development Plan. The contents of this assessment formed part of the evidence base and rationale for employment site allocations and Adopted LDP strategy and policy.

2.98 At the time of the Employment Needs Assessment the baseline position in the Powys Unitary Development Plan (UDP) (2001-2016), in terms of total employment land allocated was 75.14 ha. This was comprised of 33.8 ha identified as key employment locations, 20.7 ha allocated as general sites to give support to other settlements and finally, the UDP also allocated Local Employment Sites which provided a further 20.64 ha of employment land.

2.99 The review found that 64.31 ha remained undeveloped, suggesting a take up off 10.83 ha during the period 2001-2011, equivalent to approximately 1 ha per annum. Table 9 breaks down the remaining allocation by proposed category:

Table 9 – Remaining Allocation by Proposed Category

Category	Land Remaining (ha)
Prestige	13.87
High Quality	15.62
Local	23.37
Neighbourhood	2.55
TOTAL	55.41

Source: Powys Employment Needs Assessment (2012)

2.100 This supply compared with an estimated gross requirement of 40-56 hectares over the 15 year LDP plan period, indicating a surplus of 6-22 hectares. The requirement was arrived at after taking into account the economic outlook projected at the time as well as wider evidence on historic patterns of take up and the development market context. The primary driver of this requirement was the anticipated need to replace and upgrade the existing supply of premises in order to tackle issues of dilapidation and the need to deliver the required type and quality of premises for modern business occupiers. This made up 21-29 hectares of the requirement.

2.101 The assessment also looked into supply spatially (replicated in Table 10 below), finding that with the exception of the Central area, supply broadly matched demand. From this, it was recommended that the Central area (Llandrindod Wells to Builth Wells) might have some potential for the de-allocation of sites while investment to encourage the regeneration of existing employment sites across Powys was also recommended. *This is reassessed in the following chapters of this 2024 assessment*.

Table 10 – Indicative Sub-Area Requirements

Sub-Area		Current Employment Share	Core Requirement (ha)	Total Including Flexibility Allowance (ha)	Supply (ha)
Machynlleth	Office	5%	0.3 - 0.4	0.4 - 0.6	
	Industrial	2%	0.5 - 0.7	0.6 - 0.9	
	Total		**0.8 - 1.1**	**1 - 1.5**	**1.5**
Severn Valley & North	Office	54%	3.2 - 4.5	4.3 - 6.0	
	Industrial	70%	16.7 - 23.5	22.3 - 31.3	
	Total		**19.9 - 28.0**	**26.6 - 37.3**	**32**
Central	Office	33%	1.9 - 2.7	2.6 - 3.7	
	Industrial	22%	5.3 - 7.4	7.0 - 9.8	
	Total		**7.2 - 10.1**	**9.6 - 13.5**	**25**
Ystradgynlais	Office	8%	0.5 - 0.7	0.6 - 0.9	
	Industrial	6%	1.4 - 2.0	1.9 - 2.7	
	Total		**1.9 - 2.7**	**2.5 - 3.6**	**3.7**

Source: Powys Employment Needs Assessment (2012)

Powys County Council Employment Needs Assessment Addendum (2015)

2.102 Following consultation on the Deposit Draft LDP, it identified that there was a need to review and update various documents within the LDP evidence base, including the Powys Employment Needs Assessment, as an Addendum.

2.103 The Addendum took into account the relevant changes in the national and local economy, tested the robustness of the original Assessment's findings using the latest household and population projections whilst addressing a variety of issues raised in the Deposit LDP consultation period.

2.104 The Addendum broadly confirmed the findings of the original assessment, deeming that it contained sufficient flexibility to accommodate any peaks, unexpected demands or shifts in sectoral activities that may take place during the LDP period to 2026. The document reiterated that *'the challenge for economic development in Powys remains not in the supply of allocated land for employment purposes, but in bringing forward sites and delivering development. Policies to encourage mixed-use to enable such development were therefore recommended in the original Assessment are considered to remain valid.'*

Powys Public Service Board – Well-Being Assessment (2022)

2.105 This document is a comprehensive study of the well-being of Powys' communities, conducted by a partnership of public sector organisations. The assessment has been used to inform the development of the local Well-Being Plan. The document delved into the Social, Economic, Cultural and Community and Environmental aspects of well-being through an analysis of data gathered and the outputs derived from engagement with stakeholders.

Powys Town Investment Plans – Consultation Draft Action Plans (2023)

2.106 These documents articulate a vision and priorities for the future of each of Powys's Towns in order to help attract and shape investment and support vitality. Eight towns are involved in the study including Llanidloes, Rhayader, Builth Wells, Llanwrtyd Wells, Ystradgynlais, Montgomery, Llanfyllin and Talgarth. The initiative is currently at a stage where five Consultation Draft Action Plans have been released.

2.107 There is a prevailing theme throughout the County's towns of high occupancy but a lack of appropriate premises for businesses to start-up and grow. This is driven by the 'viability gap' of commercial development projects with development costs outweighing potential income generated by development. This fundamental issue is reported by local commercial agents as a key reason for the general absence of speculative development in the area. The poor qualitative condition, including energy efficiency and performance of some existing employment floorspace is another reported issue.

2.108 Generally, industrial demand is for small to mid-sized units, including 200-500 sqm units and 1,000-2,000 sqm units. Larger requirements are rarer but consultations highlighted demand for units of 5,000-10,000 sqm in Rhayader at the time. Meanwhile, the office market is more limited yet changing workplace trends have raised demand for more flexible innovation workspace. Here demand is focused on small units of approximately 200 sqm.

2.109 Rhayader was allocated 3.7 ha of new employment land for the period 2011-2026 in the Powys Adopted Local Development Plan. However, consultations highlighted that the land, allocated to the south and east of the Brynberth Enterprise Park was still available at the time of writing, with agents indicating a lack of market demand in this location compared to available land/sites elsewhere.

2.110 Ystradgynlais is defined as a major employment hub in Powys with large amounts of industrial stock across the five main employment sites. Units vary in age and size with large, newer units available at the Woodlands Business Park whilst smaller units, workshops and a small number of large units are available in the industrial estates. There is significant demand reported here for industrial units, again mainly for smaller units.

2.111 The Town Centre Investment Plan for Ystradgynlais notes the plans for a Global Centre of Rail Excellence (GCRE) facility to be built. While consultees saw the economic growth opportunities created by the GCRE investment to be significant, there were concerns about the pressures the investment could add to the supply and availability of sites and premises. Consequently, the need for a new tertiary business park in the Ystradgynlais area has been identified by the GCRE to fully capitalise on the economic opportunities created**.**

Powys LDP Review Report (2022)

2.112 The review of the LDP was prepared in order to ensure the Adopted LDP, and its supporting evidence base, continues to provide a sound and effective basis for making planning decisions. The key findings of the report are summarised as follows:

- The LDP's Key Issues and Considerations, Vision and Objectives will need to be reconsidered to incorporate well-being objectives, placemaking and National Sustainable Placemaking Outcomes
- The LDP's Growth Strategy will need to be reconsidered in order to address issues with housing delivery and to reflect evidence around the future need of the plan area. The distribution of that growth across the LDP area, through the Spatial Strategy, will, therefore, also need to be reconsidered.
- Changes will be needed to the detailed policies and proposals of the

LDP to reflect the re-consideration of the strategy and to reflect updated national planning policy and guidance, and relevant evidence.

- The Adopted LDP's evidence base will need to be updated in line with the latest requirements of national planning policy and guidance.
- The Adopted LDP's Sustainability Appraisal, including Strategic Environmental Assessment, and Habitat Regulations Assessment, together with other impact assessments, will need to be reviewed, with consideration given to an Integrated Sustainability Appraisal.
- The LPA will need to work collaboratively with other LPAs within the Mid Wales region and in support of the Strategic Development Plan process.

2.113 Consequently, it was found that the Adopted LDP will need to be revised through a Full Revision, rather than a Short Form Revision. It was determined that the Replacement LDP will need to be prepared for the period 2022-2037.

2.114 The LDP review was undertaken two-thirds of the way through the Plan period and found that the spatial delivery of employment land generally aligned with the spatial distribution of growth identified within the Adopted LDP. The report found this as the percentage of employment land growth planned for each of the tiers in the settlement hierarchy broadly aligned with the percentage of employment land permitted since the LDP's adoption.

2.115 In terms of employment allocations, the minimum employment requirement was estimated to be 30 hectares for the Plan period (2011 – 2026), equivalent to a take up of 2 hectares per annum. Since the LDP's adoption (17th April 2018) to 31st March 2021, a total of 6.11 hectares of employment land was permitted on allocated employment sites. The review comments that, *'Whilst the 6.11 hectares appears to demonstrate that the LDP is delivering, detailed analysis shows that the 6.11 hectares is made up of a relatively small number (six) of large planning applications.'*

2.116 The review is cognisant of the emphasis the Welsh Government's Future Wales (February 2021) document places on the development of the foundational economy and therefore it anticipates that the Replacement LDP will include economic development policies relating to the foundational economy.

3.0 SOCIO-ECONOMIC PROFILE

Introduction

3.1 This section brings together several data sources including Census, Business Register and Employment Survey (BRES) and Office of National Statistics (ONS) data to create a profile of the employment market of Powys. It helps to consider the size of the economy, dominant business sectors and what types of businesses are present within the County. At the time of writing, some data results from the 2021 Census had been released and are included where available, though more detailed data (e.g. commuting information) has yet to be released.

3.2 Much of the county-wide level data that is available includes the Bannau Brycheiniog / Brecon Beacons National Park (BBNP) area that lies within Powys County. For the purposes of the socio-economic analysis of the Powys local authority area population, it is useful to exclude the BBNP population and the data below presents the Powys population excluding the BBNP population, unless otherwise stated.

Demographic Assessment

Population

3.3 According to ONS Population Estimates, Powys local authority area had a total of 109,012 residents at the time of the 2021 Census, with Table 11 providing a comparison to Powys County (including BBNP) and Wales. The proportion of the population of working age, 16-64 years old, in Powys was 56.6 percent, significantly below the Welsh average, due to a higher proportion of 65+ year olds in Powys.

Table 11 – Total Population (2021 Census)

Area	Total Population	Population aged 16-64	Proportion of 16-64 year olds (%)
Powys Local Planning Authority Area	109,012	61,769	56.6
Powys County (inc. BBNP)	133,188	75,445	56.6
Wales	3,107,491	1,897,366	61.1
United Kingdom	67,081,234	41,845,027	62.4

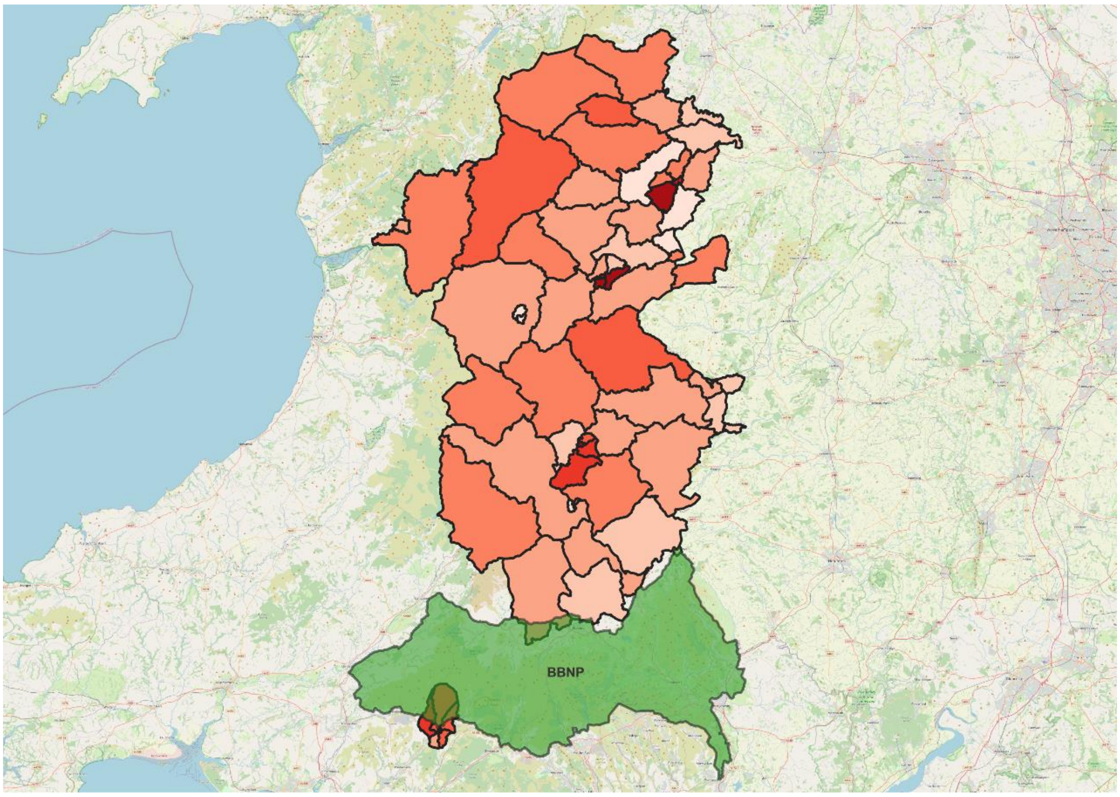
Source: NOMIS, 2021 Census

Deprivation

3.4 The Welsh Indices of Multiple Deprivation (WIMD) were updated in 2019. Figure 2 below illustrates the level of deprivation in each of the 64 Lower Super Output Areas

(LSOA's) that make up Powys Local Planning Authority area. The figure shows that there is substantial diversity in deprivation across Powys, but that the majority (47 of 64, or 73.4 percent) of LSOA's were less deprived than the average in Wales.

Figure 2 – Welsh Index of Multiple Deprivation by Decile for Powys LPA area (excluding BBNP), 2019



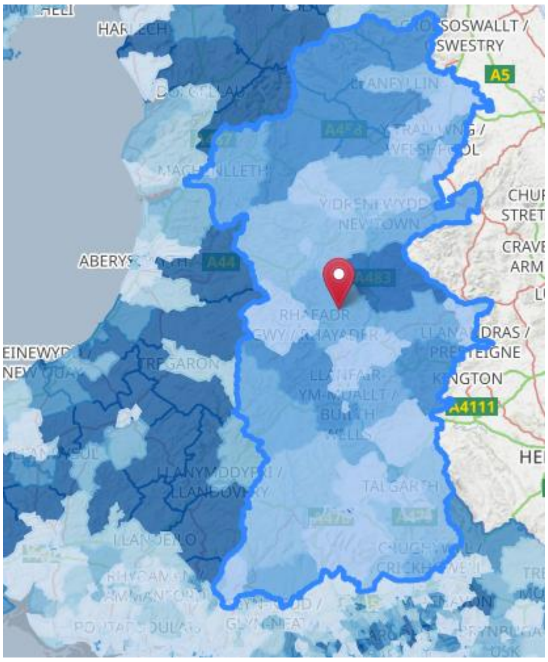
Source: Welsh Indices of Multiple Deprivation, 2023

3.5 Only one LSOA in Powys was in the top 10 percent most deprived LSOA's in Wales, this being Ystradgynlais 1. This is located in the centre of the town of Ystradgynlais, in the south-west of the County.

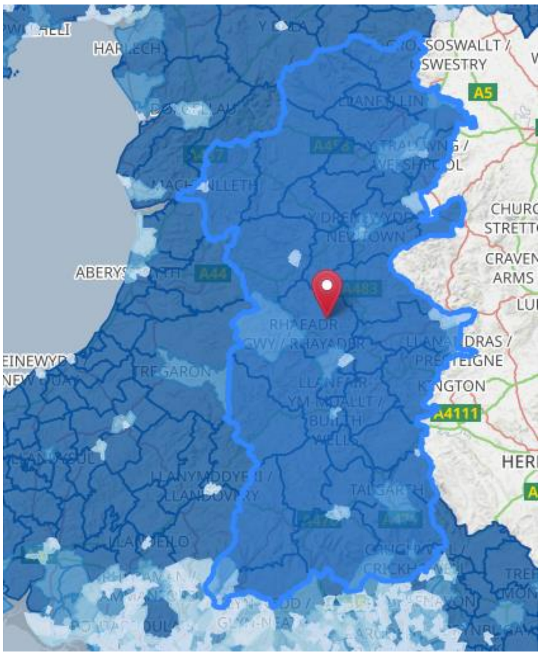
3.6 Although none of the Powys LSOA's were in the top 10 percent least deprived, six, or 9.4 percent, were in the top 20 percent of least deprived areas in Wales, including parts of Newtown and Welshpool.

3.7 However, while overall there was a relatively low level of deprivation in Powys, on the overall WIMD, this index can be broken down into its constituent measures. On this basis, there is more widespread deprivation on the measures of access to services and housing, as seen in the figures below.

Figure 3 Indices of Deprivation for Access to Services and Housing for County of Powys



Housing



Access to Services

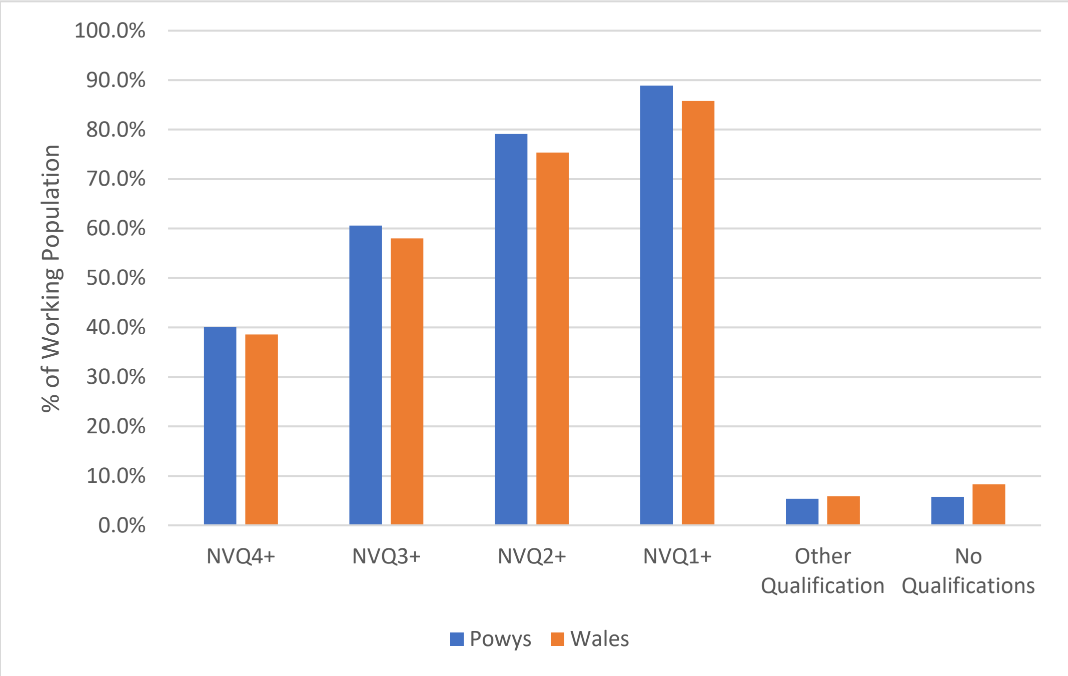
Source: Welsh Indices of Multiple Deprivation, via DataMapWales, 2023

** darker colours indicate more deprived areas*

Qualifications

3.8 Figure 4 below shows the National Vocational Qualifications (NVQ) level attained by the working age population of Powys (including BBNP area) in 2021. It can be seen that the levels of NVQ1-4 qualifications in Powys sit higher than the national average. This positively shows a strong workforce within the county. In addition, there is a lower proportion of individuals with no qualifications in Powys (5.8 percent) compared to Wales (8.3 percent), another indication that Powys is above average in terms of resident population education.

Figure 4 – Qualifications Across County of Powys, 2021



Source: ONS Annual Population Survey

Earnings

3.9 Table 12 shows that the gross median weekly earnings of the workers in Powys (including BBNP area), when measured by place of work, was £594.30, £5.40 lower than the national average. When measuring the gross median weekly pay by place of residence, Powys's average of £627.90, slightly lower than the Welsh average of £636.10. Growth over the past 12 months has been higher in Powys than for the national average on both the place of work and residents' earnings measures.

Table 12 – Average Weekly Earnings, 2023

Area	Gross Median Weekly Pay, £ (Analysis by place of work)	Gross Median Weekly Pay, £ (Analysis by place of residence)
Powys	594.30	627.90
Wales	599.70	636.10

Source: Nomis, 2024

Employment Growth

Economic Activity

3.10 The table below summarises the economic activity levels of the County of Powys (including BBNP area), based on the ONS Annual Population Survey. The economically active level and the unemployment rate in Powys in 2022/23 was similar to the Welsh averages.

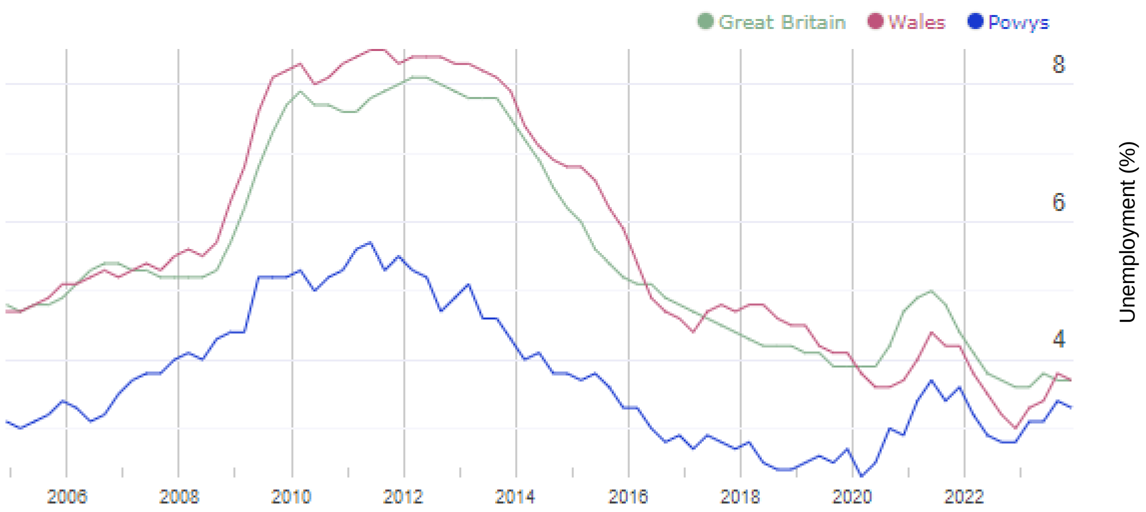
Table 13 – Economic Activity, Apr 2022 – Mar 2023

Area	Economically Active	Unemployment Rate
Powys	75.7%	3.1%
Wales	75.5%	3.3%

Source: Annual Population Survey, 2023

3.11 As seen in the time series graph (Figure 5), the level of unemployment in Powys has generally tracked lower than the Welsh average. Overall, the unemployment rate in Powys has been very low in recent years, through saw a slight rise through 2023 (though still low overall). With ongoing uncertain economic conditions and inflation pressures, there is the potential for further modest rises in unemployment.

Figure 5 – County of Powys (including BBNP area) Unemployment Rates 2003-2023



Source: Nomis, 2024

Sectoral Employment

3.12 BRES data provides details on the number of jobs within differing industry sectors within Powys. The table below shows the employment numbers in each sector in Powys County, in comparison to Wales.

Table 14 – Employment by Sector, 2022

Industry	Employment			
	Powys County		Wales	
	Number	Percent	Number	Percent
Agriculture, forestry & fishing	9,000	15.6	38,000	2.8
Mining, quarrying & utilities	600	1.0	22,000	1.6
Manufacturing	6,000	10.4	140,000	10.4
Construction	2,500	4.3	68,000	5.1
Motor trades	1,000	1.7	26,000	1.9
Wholesale	2,000	3.5	30,000	2.2
Retail	5,000	8.6	121,000	9.0
Transport & storage (inc. postal)	2,250	3.9	57,000	4.2
Accommodation & food services	5,000	8.6	117,000	8.7
Information & communication	900	1.6	30,000	2.2
Financial & insurance	2,500	4.3	38,000	2.8
Property	600	1.0	20,000	1.5
Professional, scientific & technical	3,000	5.2	68,000	5.1
Business administration & support services	2,500	4.3	88,000	6.5
Public administration & defence	3,000	5.2	104,000	7.7
Education	3,500	6.1	116,000	8.6
Health	6,000	10.4	198,000	14.7
Arts, entertainment, recreation & other services	2,500	4.3	63,000	4.7
Total	**57,850**	**100.0**	**1,344,000**	**100.0**

Source: BRES, 2024

3.13 The figures in Table 14 show that the agriculture, forestry and fishing sector is the largest employment sector in the County in 2022, providing some 9,000 jobs or 15.6 percent of the total workforce. Manufacturing and health each provided about 6,000 jobs in Powys (inc. BBNP). The proportional employment in the County in agriculture was significantly higher than that for Wales (2.8 percent) and the manufacturing proportion matched the Welsh average.

3.14 Private sectors which are typically found within offices comprise:

- Information and communication
- Financial and Insurance
- Property
- Professional, scientific and technical

- Business Administration and support services.

3.15 These typically office-based sectors accounted for a combined total of 16.4 percent in the County, or 9,500 jobs, compared with 18.2 percent for Wales. Welsh averages will be skewed by larger centres such as Cardiff and Newport.

3.16 Business administration represents a significantly smaller role in Powys County compared to Wales as a whole, accounting for 4.3 percent of employment, compared to 6.5 percent.

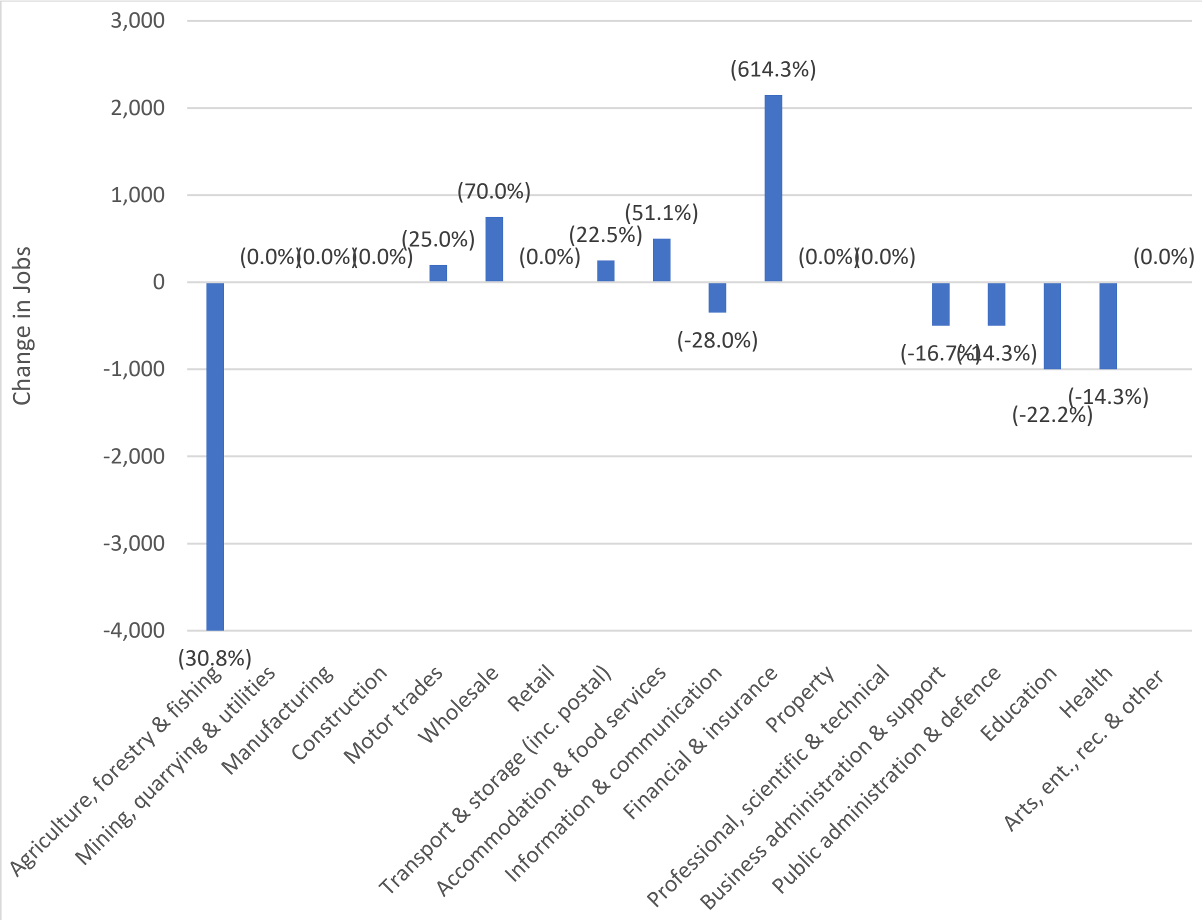
Growth and Decline of Employment Sectors, 2017-2022

3.17 As of 2022, within Powys County there were a total of 57,850 jobs across the 18 different sectors. Overall, between 2017-2022, the total number of jobs across the County decreased by 3,500, equivalent to a 5.7 percent decrease. Figure 5 breaks down the change in the number of jobs by sector. It should be noted that for smaller areas, such as a local authority area, the BRES information has a significant level of uncertainty and rounding in the numbers and thus changes of individual sectors from year to year will also have uncertainty. This is due to the BRES data being based on a nation-wide survey, which is then modelled to disaggregate to smaller areas.

3.18 Changes in estimated employment varied significantly between the sectors. As can be seen in Figure 6, the decline in the overall employment levels has been driven by the agricultural sector, which has been estimated to have declined by about 4,000 jobs. Other sectors estimated to have significantly declined between 2017 and 2022 are education and health.

3.19 The financial and insurance sector also saw a substantial increase in estimated employment, from 350 in 2017 to 2,500 jobs in 2022. However, there is significant uncertainty in this growth, with the annual BRES data between 2015 and 2021 estimating employment in this sector at about 350-450 jobs in each year, before the 2022 estimate of 2,150, with it unclear within Powys where such growth may have occurred. Therefore, caution should be taken when using this figure and monitoring of future BRES data should be undertaken to cross-check this data point. Other office-based sectors saw stable estimated job levels or slight declines between 2017 and 2022.

Figure 6 – Change in Employment by Sector, 2017-2022*



Source: BRES, 2024

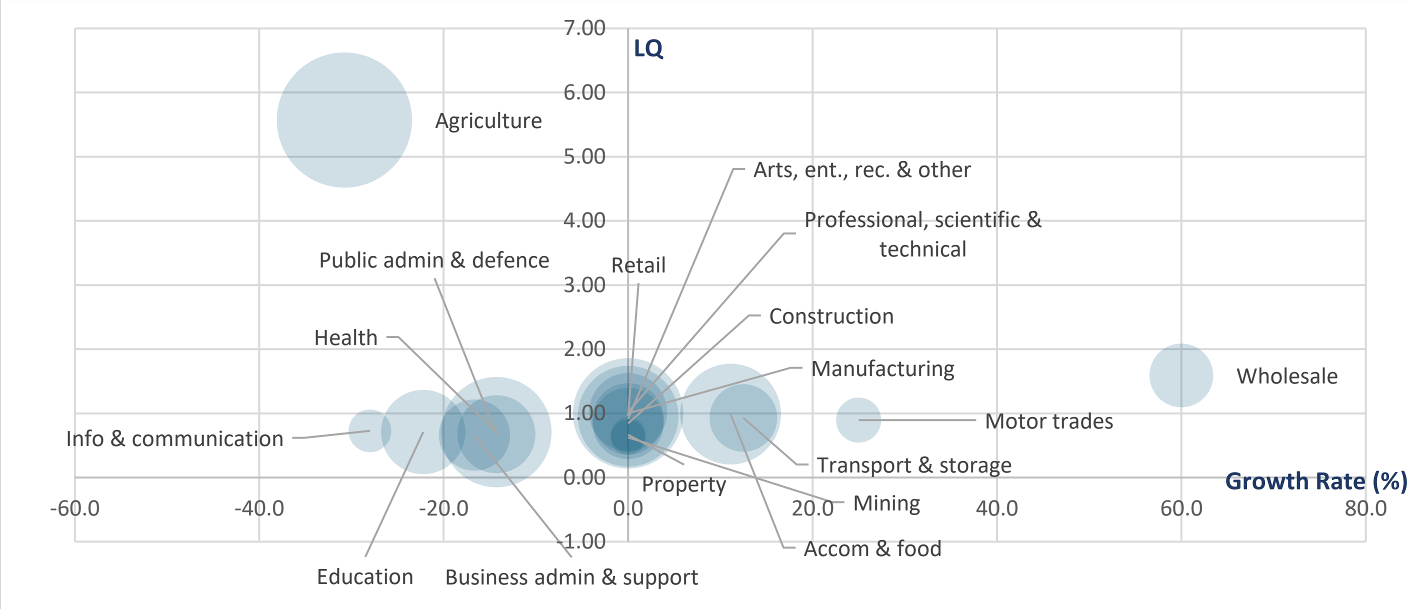
**Number in brackets is percentage change of jobs*

3.20 Overall, six of the 18 sectors saw a decline in employment between 2017-2022 and five saw increases. The five increasing sectors were finance and insurance, wholesale, accommodation and food services, transport and storage and motor trades.

Location Quotients

3.21 Location Quotients (LQ) are a measure of an area's specialisms within the local economy. Figure 6 displays these along with both the size of the sector in 2022 (size of the bubble) and its growth through employment numbers over the time period of 2017-2022.

Figure 7 – Location Quotients vs Employment vs Growth, 2017-2021



Source: BE Group analysis of BRES, 2024

** excludes finance and insurance sector due to its growth rate of 614% skewing the graph.*

3.22 Location Quotients are displayed on the vertical axis (y axis), describing the proportion of employment within a sector in Powys County relative to Wales in 2022. It is a measure of an area's specialisms i.e., if a certain sector is more prevalent in the area than in the country as a whole. A score of 1.0 shows a sector performing at the same level as seen in Wales, and a score of 2.0 means that the proportion of jobs in that sector in the area is twice that of Wales.

3.23 The sectors situated at the top of the diagram (i.e., at the top of the vertical axis) show the sectors which have a high degree of localised specialisation, compared to Wales. Agriculture had the highest level of specialism in Powys County (LQ=5.6). Other sectors with an LQ above 1.5 are wholesale (1.6) and finance and insurance (1.5).

Business Types

Number and Size of Businesses

3.24 ONS data identifies that as of 2023 there were 8,670 VAT registered businesses operating in Powys (including BBNP). ONS Business Count data is not available at an LSOA level and therefore the exclusion of the BBNP area from the data for this section is not possible.

3.25 92.6 percent of businesses in the County of Powys employed less than ten people (micro businesses), 3.4 percentage points more than the Welsh average. All other size bands account for a relatively smaller proportion of businesses in Powys than recorded in Wales.

Table 15 – UK Business Counts (Enterprises), 2023

	Micro (0 to 9)		**Small (10 to 49)**		**Medium-sized (50 to 249)**		**Large (250+)**		**Total**
	Number	*%*	*Number*	*%*	*Number*	*%*	*Number*	*%*	*Number*
Powys	8,030	92.6	560	6.5	75	0.9	10	0.1	8,670
Wales	95,625	89.2	9,690	9.0	1,525	1.4	340	0.3	107,180

Source: ONS, 2024
** numbers may not add up due to rounding*

Business Change by Sector

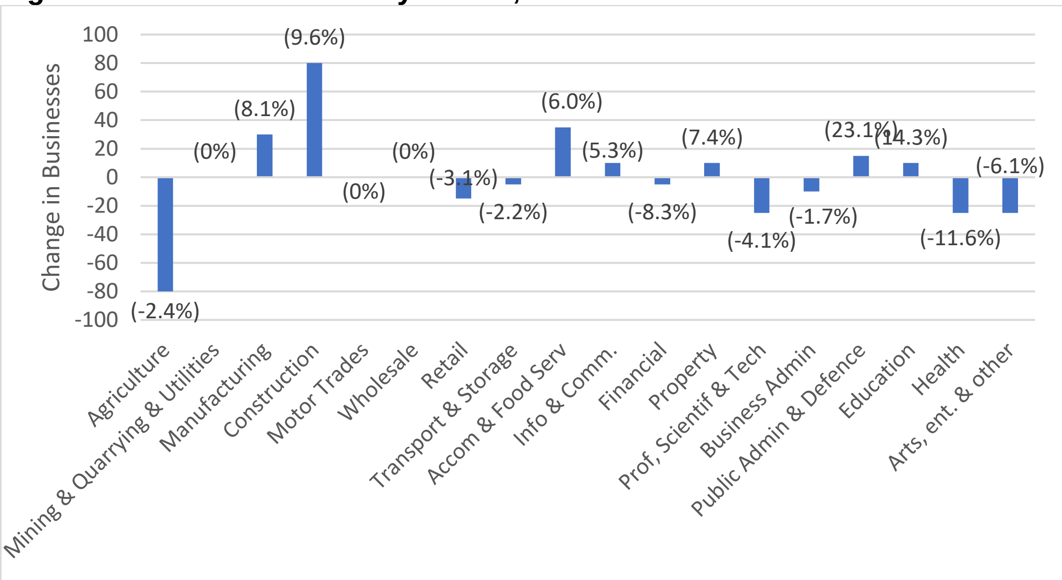
3.26 In Powys, the total number of registered businesses remained relatively stable, decreasing slightly from 8,680 to 8,670 between 2018-2023.

3.27 Seven of the 18 sectors saw an increase in the number of businesses between 2018-2023. The construction sector saw the largest absolute rise in the number of businesses, 80, equivalent to a 9.6 percent increase. Other sectors seeing notable growth in business numbers include accommodation and food services (+35 enterprises) and manufacturing (+30). By comparison, across all of Wales there was a net change of only +5 enterprises in the manufacturing sector, suggesting that the County of Powys is outperforming other areas in Wales in manufacturing.

3.28 The sectors with the largest net losses in enterprises between 2018 and 2023 in the County were agriculture (-80 enterprises), professional, scientific and technical (-25), health (-25) and arts, entertainment and other services (-25). The large loss of agricultural firms is consistent with the losses in overall employment in this sector.

3.29 Collectively, office-based sectors saw a small decline in business numbers of 20 businesses, equivalent to a 1.3 percent decline. This was not uniform, with information and communications and property seeing modest enterprise growth, offset by the other office-based sectors.

Figure 8 – Business Count by Sector, 2018-2023



Source: Business Counts, 2024

**Number in brackets is percentage change of businesses gained/lost*

3.30 Some additional points worth noting include:

- The agriculture sector saw a decrease in jobs and enterprises in recent years, though remains a key sector for the County and the area of most significant specialism of employment. Further support to stabilise employment and enterprise numbers in this sector will be important for the ongoing health of the County's economy.
- Manufacturing continues to be a sector of importance in the County of Powys, being the equal second largest employment sector and the number of enterprises growing by 8.1 percent over the last five years despite constrained availability of premises (see later in this report).
- Enterprises in the construction sector increased by 9.1 percent between 2018 and 2023, although employment remained stable (between 2017 and 2022).
- The wholesale sector saw considerable employment growth (+750 jobs), though has seen stable enterprise numbers, suggesting that the existing businesses are expanding their workforce.
- Sectors with significant public sector employment (Public administration and defence, education and health) saw significant losses in employment across the board, totalling, 2,500 jobs, though stable numbers of enterprises across these sectors, reflecting the consolidation of employment in the public sector in recent years.

Commuting Patterns

3.31 The latest data available for statistics on commuting in Powys (including BBNP) and Wales are seen in Table 16 below. 2023 statistics will somewhat reflect the 'new normal' with workers returning to the office, now the Covid-19 pandemic restrictions are no longer in place.

3.32 The 2023 data shows that 85.3 percent of Powys's resident population was also employed in the County. This shows a significant level of containment of employment within the County, reflective of its wide geography and the distance to larger employment nodes. The below figures are based on the 2011 Census commuting patterns, adjusted and updated using data from the Annual Population Survey (UK Wide) and the annual Welsh Labour Force Survey. Therefore, the data is an estimate based on surveys and thus subject to a margin of error, particularly for smaller labour markets.

Table 16 – County of Powys Commuting, 2023

Area	Out-Commuters (No.)	In-Commuters (No.)	Live and Work in Area (No.)	Percentage who Live and Work in area as a Percentage of the Total Employed, percent
Powys (inc. BBNP)	8,700	12,100	50,300	85.3
Mid Wales	12,300	16,700	82,400	87.0
Wales	81,800	31,600	1,383,200	94.4

Source: Welsh Government, 2024

3.33 A significant proportion of out-commuting from Powys was to England, and specifically the West Midlands. In total, it is estimated that 4,400 workers commuted out of Powys to outside of Wales in 2023, 93.2 percent of which go to the West Midlands. This compares to 4,300 workers who commute to elsewhere in Wales.

3.34 In terms of in-commuting, the main importer of labour into Powys was the West Midlands at 5,100 workers. This was followed by 2,700 workers from South West Wales. In total, 12,100 commuters came into Powys for work, whilst 8,700 out-commuted, giving a net negative flow of about 3,400 workers out of the County on average in 2023.

4.0 PROPERTY MARKET ASSESSMENT

4.1 This chapter provides an overview of the commercial property market for Powys. The report draws on information gathered from a variety of market reports produced by national agents, specific dialogue with local property agents and other stakeholders as well as a considered reflection on emerging trends and prospects.

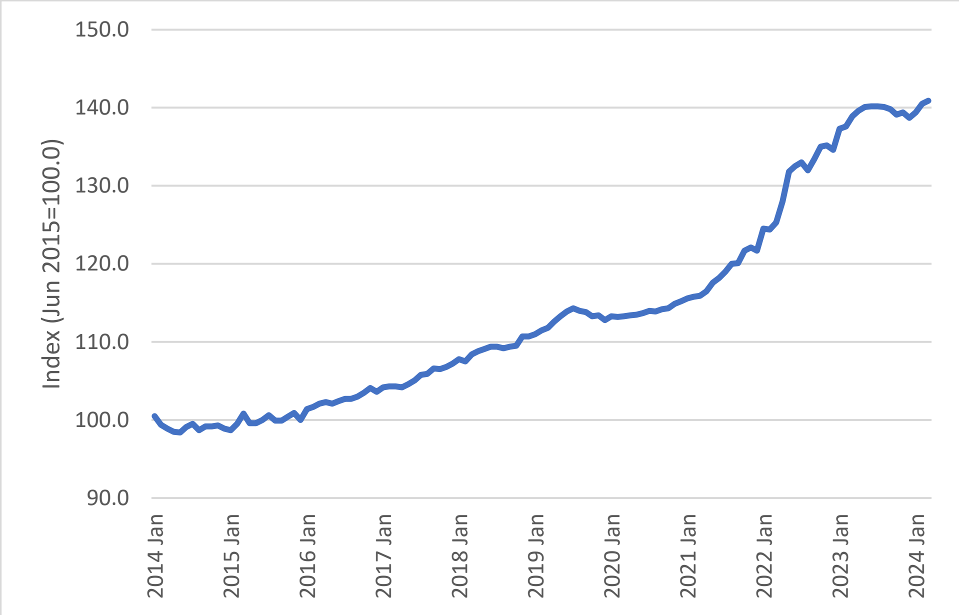
Economic Context and Market Drivers

4.2 The UK economy has been through a series of tumultuous changes in recent years. First there were signs of recovery from the global financial crisis of 2008 before commercial confidence was unsettled again following the decision to leave the EU in 2016. The global economy was again in crisis due to the impact of the Covid-19 pandemic with prospects for recovery further impacted by the war in Ukraine and ensuing energy crisis. The ensuing rise in the cost of living was compounded further by the interim fiscal review put forward by the short-lived Truss/Kwartang Premiership and Chancellorship.

4.3 Inflation in the UK reached a 40-year high of 11.1% in November 2022 and remained in double digits until April 2023, though has seen significant falls since and the June 2024 level is now a more moderate 2.0%. The increase in inflation saw significant rises in the official base rate between 2020 and 2023, though has remained steady in recent months and the July 2024 level remains at 5.25%. It is expected that the next move in the base rate will be downwards, though unlikely to come close to the very low levels seen throughout the 2010's. Therefore, borrowing costs for consumers and businesses will continue to be more significant than in those very low interest rate years.

4.4 This has implications for the costs of development for employment schemes. The construction price index tracks the changes in construction costs in the UK over time and is illustrated in the graph below. It reflects broader price changes in the economy through 2022, with a stabilisation in recent months, though no significant decline in prices. Therefore, developers are still facing significant costs for construction projects and in more price-sensitive market (such as smaller communities or employment markets), there is likely to be considerable on-going viability constraints.

Figure 9 – Construction Output Price Index



Source: ONS, 2024

Property Market Context – UK and Regional Trends

4.5 Across the UK the **industrial and logistics property market** was experiencing record levels of demand with the surge in on-line retailing coming out of the Covid-19 pandemic whilst there were more negative impacts on other market sectors such as offices, retail and leisure.

4.6 2020 to 2022 saw substantial growth in distribution and logistics warehouse space take-up throughout the UK, peaking at over 3.7m sqm in 2022. However, as global economies contracted in 2023 and the pandemic-fuelled demand for warehouse space subsided, demand for floorspace also fell through 2023 and early 2024. CBRE reports that Q1 2024 take up of logistics space in the UK was approximately 420,000 sqm, which was 31% below the five-year average for the quarter (CBRE's UK Logistics Q1 2024 Market Summary).

4.7 A more positive picture is emerging in the market in Wales, with take up in the first half of 2024 at over 1.0m sqft (95,500 sqm), which is 69% above the same level in 2023 (Knight Frank's Logic: Wales Q2 2024). The focus of growth is in Newport. Knight Frank also report that manufacturers are taking a larger share of the large unit market, taking 46% of space in 2024, compared to 33% in 2023. This positive demand has had implications for vacancy rates, reducing from 16.6% in Q1 2024 to 12.2% in Q2.

4.8 In terms of the **UK Office Market**, this was clearly subdued during the early stages of the Covid pandemic with the switch to home-working but general signs are that the sector was slowly recovering. Occupiers continue to be highly selective, however, in terms of locations and quality of space. Flexibility of office space both in terms of operating fit-out to support hybrid working and ability to flex space as needs change over time is vital with large numbers of unwanted spaces being returned to the open market. Generally, office transactions remain below the pre-pandemic levels and have taken a further hit more recently with concerns over the global economy and moves to contain operating costs.

4.9 Cardiff, of course, dominates the Wales office market with some 25,800sqm transacted in 2023 according to research by Savills (Market in Minutes: Cardiff Occupational Office Data), which was down from a very high level in 2022. However, take-up in Q1 2024 was 45% higher than for Q1 2023 and 24% above the five-year average. Savills report that secondary stock represented 96% of take-up in Q1 2024, reflecting the lack of new build office in the market. Half of the take-up was from the public sector. Grade A to prime office rents remain robust with headline rents holding up at around £23 - £25/sqft (Savills).

Powys Industrial Market

4.10 The industrial market across Wales has remained relatively buoyant in recent years with key focal points related to strategic road network and centres of population/labour. Dominant market areas, therefore, include Newport and Cardiff fringes around the M4, the Heads of the Valleys strategic corridor, Swansea Bay/Port Talbot and Deeside in North Wales, both with Enterprise Zone designations.

4.11 In Powys, demand is very much focused around the Newtown/Welshpool A483 corridor reflecting the strong road connections and proximity to the wider regional markets across the borders. Interest is especially strong for 250 – 300 sqm units with potential for outdoor storage space.

4.12 Beyond this area, demand is very localised across the wider rural area and clustered around key settlements. As with other parts of Wales, demand tends to concentrate on smaller workshop units which fall under the Business Rate value threshold of £12,000 rateable value which are typically 100 – 150 sqm units.

4.13 Supply constraints are prevalent in both unit sizes across Powys which is increasingly pushing demand enquires further out of the region.

Industrial Transactions

4.14 The table below details the transactions (leases and occupational sales) which have occurred over the last 10 years in Powys for industrial premises. The Powys transactions exclude those with the BBNP Area.

Table 17: Powys Industrial Transactions, 2014-2023 (excluding BBNP area)

Industrial		Size (sqm)								
		0-100	**101-200**	**201-500**	**501-1,000**	**1,001-5,000**	**5,001-10,000**	**10,000+**	**Unknown**	**Total**
2023	Floorspace (sqm)	398	649	1,336	~	8,308	~	~	0	**10,691**
	Total Properties	7	5	4	~	3	~	~	0	**19**
2022	Floorspace (sqm)	139	286	856	725	4,738	~	~	0	**6,743**
	Total Properties	2	2	3	1	3	~	~	0	**11**
2021	Floorspace (sqm)	141	136	1,505	2,504	13,921	5,816	~	0	**24,024**
	Total Properties	4	1	5	3	4	1	~	0	**18**
2020	Floorspace (sqm)	~	253	2,003	~	~	~	13,843	0	**16,098**
	Total Properties	~	2	5	~	~	~	1	0	**8**
2019	Floorspace (sqm)	72	423	2,543	2,552	2,678	~	~	~	**8,268**
	Total Properties	1	3	7	3	2	~	~	1	**17**
2018	Floorspace (sqm)	175	~	653	1,545	8,764	~	~	~	**11,137**
	Total Properties	3	~	2	2	5	~	~	1	**13**
2017	Floorspace (sqm)	487	470	1,641	2,155	4,889	6,800	~	~	**16,442**
	Total Properties	8	3	6	3	2	1	~	2	**25**
2016	Floorspace (sqm)	47	467	2,085	1,164	6,442	~	~	~	**10,205**
	Total Properties	1	3	6	2	4	~	~	2	**18**
2015	Floorspace (sqm)	539	297	1,977	1,262	10,102	8,162	~	0	**22,339**
	Total Properties	8	2	6	2	3	1	~	0	**22**
2014	Floorspace (sqm)	472	881	2,290	764	12,354	~	~	~	**16,760**
	Total Properties	7	6	6	1	5	~	~	2	**27**
Total	**Floorspace (sqm)**	**2,470**	**3,862**	**16,889**	**12,671**	**72,196**	**20,778**	**13,843**	**0**	**142,709**
	Total Properties	**41**	**27**	**50**	**17**	**31**	**3**	**1**	**8**	**178**

Source: Radius Data Exchange, 2024

4.15 178 industrial deals were completed during the period 2014-2023 with a total floorspace of 142,709 sqm transacted. 2014 saw the highest number of transactions completed with 27 deals occurring, comprising 16,760 sqm of floorspace. However, surprisingly, the most floorspace was transacted in 2021 when 24,024 sqm changed hands across 18 deals, reflecting some mid to larger deals in this year as properties became available. Within this total was the largest freehold transaction (and fourth largest overall) of the decade which saw the 5,816 sqm Highbay Warehouse in Llandrindod Wells purchased by the Kiernan Group for £1,800,000, a price that also represented the decade's highest.

4.16 The most transactions were for properties between the sizes 201–500 sqm, accounting for over a quarter of all properties transacted. However, importantly, about a fifth of deals were above 1,000 sqm in Powys, which reflects a significant percentage of transactions and demonstrates that this demand segment would need to be addressed in further employment land provision. Four deals over 5,000 sqm is also significant and planning for further employment land and premises would need to include capacity to adequately meet this market, with a unit of about 5,000 sqm needing 1-1.5ha of land depending on development ratios, car parking requirements, etc.

4.17 119 deals were leasehold, representing 67 percent of the decade's transactions. Good quality secondary stock in 2023 was achieving rents of about £7.5-8.5/sqft (£80-91/sqm). From the available data, it appears that there has been only modest rental growth over the last decade, though appearing to be more consistent in 2023. However, discussions with commercial agents suggest that modern, good quality floorspace could achieve about £92/sqm (£8.5/sqft) and more basic/older accommodation would achieve rents about £5 - £6/sqft.

4.18 59 deals were freehold, representing 33 percent of the decade's transactions. 57 deals stated the price achieved with an average price of approximately £386,000. 49 deals stated pricing and sizing information; here the average price achieved was £656/sqm (£60.9/sqft).

Industrial Investment Sales

4.19 19 industrial investment sales were observed over the past decade, comprising 31,752 sqm of floorspace. All deals recorded pricing information with an average price of £620,550 being achieved. The highest price was £2,000,000 which was paid in 2022 for a 5,805 sqm building on Henfaes Lane, Welshpool. In terms of yields, only two were recorded, the lowest of which was 8.33 percent while the other came in at 11.78 percent.

4.20 Recorded investment deals in Powys for industrial units since 2019 are listed below. This level suggests reasonable investor interest in the region during a time of economic uncertainty.

Table 18 – Powys Industrial Investment Deals

Address	Size (sqm)	Date	Achieved Price (£)	Purchaser
Trawsfford Hall Units, Trawsfford Road, Ystradgynlais	N/A	27/07/2023	401,000	Not disclosed
U1326 From Access Road to Cambrian House To Junction With Private Road To Railway Terrace, Builth Road, Builth Wells	174	22/03/2023	140,000	Tai Llechrhyd Ltd
Unit 11, Woodlands Business Park, Ystradgynlais	2,170	20/02/2023	1,135,000	MMR Holdings Ltd
Unit 38, Mochdre Industrial Estate, Newtown	1,986	31/05/2022	754,374	Three Sixty UK Holdings Ltd
Unit 8a, Dyffryn Industrial Estate, Newtown	188	20/05/2022	369,000	Perthy Properties (Vr) Ltd
Technocover Ltd Unit C, Henfaes Lane , Welshpool	5,805	03/01/2022	2,000,000	Not disclosed
Plot 1 Unit 5, Four Crosses Business Park, Llanymynech	N/A	25/03/2021	115,000	Northern Industrial Battery Services Limited
Unit 1, Ddole Road Industrial Estate, Llandrindod Wells, Llandrindod Wells	1,252	28/03/2019	250,000	Gwynedd Council
Unit 21a, Mochdre Industrial Estate, Newtown	448	07/03/2019	141,500	Not disclosed

Source: Radius Data Exchange, 2024

Powys Office Market

4.21 The regional office market in Powys is similarly polarised around the primary settlements to meet very localised demand. Particular interest exists for small office suites with flexible/short-term agreements which creates significant management challenges for many office property investors/landlords.

4.22 There could be potential for public sector support to help broker a package deal through an over-arching head-lease agreement to provide security to landlords and sub-let through licence arrangements to individual occupiers. Evidence elsewhere often shows whilst occupiers are initially cautious to commit to long lease terms, similar flexible managed workspaces tend to command robust occupancy levels and retention of occupiers prepared to pay more for the inherent flexibility and safeguards.

4.23 Similar issues are being faced with the Pryce Jones building in Newtown which is seeing lot of interest for small office/business spaces but the floorplate layout of the building is more difficult and costly to reconfigure. The building is currently around 30% vacant with some 25,000 sqft of accommodation to let across two floors and asking rents down to £2/sqft.

Office Transactions

4.24 The following table provides a breakdown of the office leasehold and occupier sale transactions for office space in Powys over the last decade.

Table 19 - Powys Office Transactions, 2014-2023 (excluding BBNP area)

Office		Size (sqm)						
		0-100	**101-200**	**201-500**	**501-1,000**	**1,001+**	**Unknown**	**Total**
2023	Floorspace (sqm)	71	~	308	~	~	0	**379**
	Total Properties	1	~	1	~	~	0	**2**
2022	Floorspace (sqm)	~	198	~	~	~	0	**198**
	Total Properties	~	1	~	~	~	0	**1**
2021	Floorspace (sqm)	122	~	267	~	~	0	**389**
	Total Properties	2	~	1	~	~	0	**3**
2020	Floorspace (sqm)	190	297	~	~	~	0	**487**
	Total Properties	3	2	~	~	~	0	**5**
2019	Floorspace (sqm)	65	~	227	890	~	0	**1,182**
	Total Properties	1	~	1	1	~	0	**3**
2018	Floorspace (sqm)	206	~	519	1,619	~	0	**2,338**
	Total Properties	4	~	2	2	~	0	**8**
2017	Floorspace (sqm)	199	~	223	~	~	~	**422**
	Total Properties	3	~	1	~	~	2	**6**
2016	Floorspace (sqm)	71	126	274	~	~	0	**471**
	Total Properties	1	1	1	~	~	0	**3**
2015	Floorspace (sqm)	28	~	~	~	~	~	**28**
	Total Properties	1	~	~	~	~	1	**2**
2014	Floorspace (sqm)	263	202	451	~	~	0	**915**
	Total Properties	4	2	1	~	~	0	**7**
Total	**Floorspace (sqm)**	**1,215**	**823**	**2,269**	**2,509**	**0**	**0**	**6,816**
	Total Properties	**20**	**6**	**8**	**3**	**0**	**3**	**40**

Source: Radius Data Exchange, 2024

4.25 The number of office deals transacted over this period is significantly lower than industrial deals. A total of 40 deals were transacted between 2014 and 2023 with a total floorspace of 6,816 sqm across the County. Therefore, at only four transactions per annum over the last decade, the volume of office stock transacted in the area is very small.

4.26 2018 saw the peak in terms of deals and floorspace transacted with 2,338 sqm across eight deals. Total floorspace transacted steadily declined after this peak (2019-2023) including pre-pandemic and pandemic times to a low in 2022 of one recorded deal at 198 sqm.

4.27 Smaller offices were the most in demand in Powys by a considerable distance with 20 deals of 0-100 sqm occurring over the decade, accounting for 50 percent of the total. Offices less than 500 sqm accounted for 84 percent of deals. No deals were recorded for floorspaces over 1,000 sqm and only three in the 500-1,000 sqm range.

4.28 34 deals were on a leasehold basis with 24 stating the level of rent achieved. On average £86/sqm (£7.95/sqft) was achieved with the highest rent being £153/sqm (£14.20/sqft) which was paid for a 20 sqm office at 35A High Street in Welshpool. The average office lease length was six years.

4.29 Six of the decade’s 40 deals were freehold, accounting for 15 percent of the total. The highest price disclosed was £500,000 which was paid by K Tonkin SIPP for the Criggion Radio Station building in 2017.

Office Investment Sales

4.30 14 office investment sales were recorded over the past decade, comprising 16,744 sqm. An average price of £333,900 was achieved across the 13 deals with pricing information. The highest price was £750,000 which was paid in 2016 by the Potter Group Limited for the Royal Welsh Warehouse, a 7,479 sqm in Newtown. This deal achieved a Net Initial Yield of 11.31 percent which is comparable to the only other deal quoting the yield information which saw the Crescent Chambers in Llandrindod Wells achieve a Net Initial Yield of 11 percent.

4.31 The table below lists the office investment deals completed since 2019 and shows most of the recent interest is in the main centres of Llandrindod Wells, Newtown and Welshpool. It also shows that there has been some investor interest in the pandemic period.

Table 20 – Powys Office Investment Deals

Address	Size (sqm)	Date	Achieved Price (£)	Purchaser
The Spa Centre, Station Crescent, Llandrindod Wells	693	20/09/2023	355,000	Not disclosed
Crescent Chambers, South Crescent, Llandrindod Wells	274	18/01/2023	125,000	Not disclosed
41 Broad Street, Welshpool	396	10/02/2022	150,000	Not disclosed
St David's Business Centre, New Church Street, Newtown	2,307	07/12/2021	N/A	Not disclosed
11c, Broad Street, Welshpool	1,969	13/09/2021	110,000	Mojo 2 Limited
Burgedin Lock Cottage, Arddleen, Llanymynech	N/A	26/05/2021	311,000	Not disclosed
The Lindens, Spa Road, Llandrindod Wells	751	25/05/2021	215,000	Not disclosed
Temple Chambers, South Crescent, Llandrindod Wells	608	10/02/2021	215,000	Llandrindod Wells Town Council
1, Station Road, Knighton	182	29/09/2020	161,000	Hafren Veterinary Group Limited
Bank House, 11 West Street, Builth Wells	N/A	22/09/2020	306,000	Not disclosed

Source: Radius Data Exchange, 2024

Market Rents

4.32 The general market rental tone for industrial space is around £8.50/sqft for good quality, modern floorspace with poorer quality space falling to £5 - £6/sqft.

4.33 Office rents across Powys are around £11/sqft for quality space dropping to around £5-£8/sqft for smaller town centre units above local shops. This contrasts with prime office rents in areas such as central Cardiff or Bristol in the order of £25-35/sqft making new build office development in Powys largely unviable.

Market information by Town

4.34 The following section provides a summary of the commercial property market by town in Powys. This reflects the spatial and economic functionality differences of each area. The commercial market areas could be summarised as:

- **A483 Spine North** – this is the key economic node for Powys. There is a broader range of unit size demand than elsewhere in the County, including interest for 1,000-2,000 sqm. There are considerable supply constraints, leading to some overflow demand being taken up in smaller areas.
- **Central Powys** – this is a more localised market, with lower churn of employment units, though some long-term occupiers. There are some rural/agricultural sector links, including farming supplies, machinery, etc., especially in Builth Wells. Office interest is modest.
- **Rural West** – some clear rural economy links, although importantly there are other functions in these nodes, based upon their links to other centres (Machynlleth's link to Ceredigion; Llanidloes' link to Newtown). Quality stock has been taken up where available.
- **Border Areas** – the nature of the employment markets in these areas is dependent on their links to wider markets. Where links are strong (e.g. Three Cocks, Hay-on-Wye) there are some outward facing businesses. However, where towns are more remote (e.g. Knighton, Presteigne) the employment market is more localised, serving the town's residential population and rural areas.
- **South of BBNP (Ystradgynlais)** – Ystradgynlais has more of a link southwards to Swansea and the Valleys, than it does to other areas in Powys. While having a reasonable quantity of employment unit stock, the quality of stock is generally basic, especially for workshops, and would benefit from better quality industrial workshops being available for this market.

4.35 Further detail on the commercial market areas, including the composition of the employment land markets within the main settlements are provided in the table below.

Table 21 – Commercial Market Areas by Town

Market Area	Town	Comments
A483 Spine North	Welshpool	Key industrial nodes within and around Welshpool include Henfaes Lane Industrial Estate and Severn Farm Industrial Estate to the east of the main settlement of Welshpool and Offa's Dyke Business Park and Buttington Cross Enterprise Park to the north. All nodes have good access to the A483, though not necessarily direct access. Henfaes Lane and Severn Farm Industrial Estates effectively form one contiguous node of employment uses, which is a mix of building supplies, general manufacturing, auto servicing. Buildings are generally older and low-ceiling industrial premises, though there is a small amount of office units (e.g. serviced offices) within this node. This node is serving a local and district market and provides affordable premises for the market. Expansion of this node to the east would be restricted by flooding constraints. Buttington Cross Enterprise Park comprises a small number of mid-size manufacturing units on larger, individual plots, with highway services and retail at the gateway. The manufacturing occupiers are important district level uses in good-quality units. At the intersection of the A483 and A458, this is an important employment node, though now built out. A canal at the western edge limits opportunities for expansion. Offa's Dyke Business Park is a new estate comprising new-build mid-size manufacturing operators. Interest in this site has been strong, reflecting good demand for B2 uses in this corridor and very limited alternatives for development sites or modern premises. The estate has been a WG-led project and has attracted occupiers such as Invertek Drives and YASA. Land is largely occupied now, though there could be greenfield opportunities for expansion (subject to planning) around the site. The Welshpool town centre has a small office market, comprising above ground floor units and office buildings such as Donalog House (WG-owned on Severn Rd). There are significant vacancies within the office market, with low demand for such uses.
	Newtown	Newtown is a key employment location benefitting from its location on the north/south A483 and connecting to western areas. Industrial areas are predominantly located in the east and south of the settlement of Newtown, with good access to the strategic road network. Newtown's commercial property market has been constrained by a lack of available stock and developable land. Dyffryn Enterprise Park is an older industrial estate, well located at the gateway to Newtown and proximate to the junction with the A483. While abutting Pool Rd, most units do not have good visibility to Pool Rd, with planting shielding the units and the frontages of the buildings facing away from Pool Rd. The units are generally low-ceiling B2 units serving a local market.

Market Area	Town	Comments
		St Giles Technology Park is an office park opposite Dyffryn Enterprise Park providing moderate grade office units. While named as a technology park, the occupiers are generally standard office users. Vastre Industrial Estate is an older estate off Kerry Rd. The completion of the Newtown Bypass has improved access for this estate, with the junction of Kerry Rd and the Bypass about 0.5km from the estate entrance. The buildings are generally of a basic to moderate quality and with low ceilings. Mochdre Enterprise Park is a large, sprawling industrial estate in the south-west of Newtown, with Mochdre Ln/Heol Ashley forming the spine of this node. The estate provides small to large industrial units, generally of a moderate quality. The estate is home to several long-term Powys businesses and key manufacturers, as well as smaller workshops and trade counters. Sloped greenfield areas surrounding the estate means that further expansions are unlikely. Abermule, a small village to the north of Newtown, has seen recent development of industrial units (Abermule Business Park), as it takes an overflow role for the provision of employment units that cannot be accommodated within Newtown. These units have been attractive to the market, being close to the A483 and within the Newtown catchment.
	Four Crosses	Four Crosses is in the far north of the County, with the majority of the settlement to the east of the A483 corridor. While the settlement is on the A483 and close to the Wales-England border, the employment node does not have visibility from the A-road and is adjacent to residential uses. Employment uses are on both sides of the B4393, centrally located within Four Crosses. The southern side comprises warehouse/depot uses. The northern side is a mix of older and newer premises, with Northern Industrial Battery Services occupying several units. Some non-B-class employment uses are located in this node, including medical services and retail. There is a disparate mix of uses within this employment node, without a clear market sector. A more prominent/visible site at Four Crosses would likely be able to attract businesses that service Wrexham/Flintshire/Cheshire.
Central Powys	Llandrindod Wells	The Llandrindod Wells commercial property market is more self-contained than Newtown or Welshpool and does not have the breadth of industrial uses of these other primary towns, particularly larger occupiers.

Market Area	Town	Comments
		Ddole Road Industrial Estate is the main cluster of industrial units, on the north outskirts of the town, but, importantly with reasonable access to the A483. Some recent development has occurred in this area to complete the estate. Heart of Wales Business Park is a good quality office park in the north of Llandrindod Wells. As well as core office uses, it has some complementary civic uses. This is a WG-owned estate and has had some long-term vacant development plots that have not come forward due to the muted demand for offices in Central Powys and significant viability gaps.
	Builth Wells	Builth Wells forms a key node for the rural and agriculture industry in the southern half of Powys and represents a link between Powys and BBNP. Several occupiers of employment units are related to the rural industry, reflecting its importance as a rural services node, including food manufacturing, machinery services and farming suppliers. The Wyeside Enterprise Park is a good quality business node, though is relatively quiet. Some development plots remain available.
	Rhayader	Rhayader is on the intersection of two A-roads (A44 and A470) connecting Powys and Ceredigion. Rhayader’s industrial nodes are of a relatively basic to moderate quality and serving a localised market. However, it is noted that several occupiers are long-term businesses in the area, suggesting a stable market. The Brynberth Enterprise Park is a WG-developed estate, with some further development plots. Despite being available for several years, these plots have not come forward. Brynberth Enterprise Park is a relatively quiet park, though containing key employers of the town. The market for units in this area is generally for smaller manufacturers.
Rural West	Machynlleth	Machynlleth has more of a functional economic relationship with Ceredigion, including Aberystwyth, than with other centres in Powys. There appear to be broader market opportunities in Machynlleth, though transaction volumes remain very low and the focus remains on small units. Treowain Enterprise Park provides a mix of depot and manufacturing uses in the east of the town. The units are a mix of moderate quality, medium and smaller units, with the WG recently building small industrial units, though are not yet occupied. A vacant employment allocation adjacent to the estate could provide for expansion of the Enterprise Park, though has not been forthcoming. Dyfi Eco Park in the north of the town is a mix of office and industrial uses, which is attracting a range of small occupiers and microbusinesses.

Market Area	Town	Comments
	Llanidloes	Llanidloes is a small town in west Powys on the A470 between Newtown and Aberystwyth. It appears to be taking some overflow demand from Newtown, with units predominantly occupied by manufacturing uses and some storage. Parc Hafren in the south of the town appears to be performing well, anchored by a coach depot. There is capacity to expand this estate and there is a current application for the extension of the coach depot. This estate could continue to provide an overflow function for Newtown. Parc Busnes Derwen Fawr in the north of the Llanidloes is a WG-developed estate with good-quality hybrid office/workshop units in a relatively low-density development. The units are suitable for start-up and small businesses.
Border Areas	Three Cocks	Three Cocks in the south-east of Powys benefits from being on the A438 connecting to BBNP and Herefordshire. While a small residential settlement, its employment node is servicing a wider, rural area. The Three Cocks Industrial Estate has a strong rural economy and storage focus, reflecting its main market opportunities. The Javel Industrial Estate is a broader mix of disparate uses without an obvious market cluster, including oil depot, car dealership and small workshops. Both industrial estates benefit from being on the A438 and having visibility from passing traffic.
	Hay-on-Wye	Hay-on-Wye is at the Wales-England border as is also partly within BBNP and partly within Powys. Its border location, particularly connectivity with Hereford, means that it has wider market opportunities, linking with research, medical and food and beverage opportunities in the wider area. AndersonBrecon Ltd, is a major pharmaceuticals manufacturer with a significant facility in Hay-on-Wye. Otherwise Hay has very limited industrial units (Green Field Industrial Estate in BBNP) and other than AndersonBrecon Ltd is not fully taking advantage of the wider area's opportunities for B-class employment.
	Knighton	Knighton is on the Wales-England border and is relatively distant from significant urban areas in either country. As such its market for employment uses is very localised, serving Knighton and the surrounding rural community.

Market Area	Town	Comments
		Knighton Enterprise Park is a small business node of good quality industrial and hybrid units off the A4113, with occupiers including auto servicing and rural/pet supplies. Potentially this site could expand to the west. A truck depot is in a standalone location further east on the A4113, which has further undeveloped land within the same ownership to the north.
	Presteigne	Presteigne is not on the A-road network and is also remote from larger urban centres, limiting its market for employment units. However, led by the WG-owned Broadaxe Business Park, Presteigne has seen some recent employment development and take-up of units. Broadaxe Business Park contains modern, good quality industrial units, with approvals in 2023 for further units. Recent occupiers are in the construction sector, including suppliers and builders. Presteigne Industrial Estate is to the north of Broadaxe Business Park and has a mix of moderate to good quality units, including a mix of built forms (brick, metal cladding, timber cladding). Units are small industrial and office/workshop hybrid uses. There are shipping containers on some sites that are being used for storage, suggesting that some businesses are making do with temporary/low cost measures, rather than having adequate permanent storage solutions. Once again, the market is very localised, with indigenous businesses and services providing for the local population (e.g. MOT services, building supplies, furnishings, cleaning, etc.)
South of BBNP	Ystradgynlais	Ystradgynlais is located to the south of BBNP, separated from the rest of Powys. It has more of a market relationship with Swansea and the Valleys than the main areas of Powys. The town is within a comfortable commuting distance to Swansea. Woodlands Business Park is a good quality estate developed by WG, comprising a mix of office and industrial units. It is in a leafy setting. Some development plots have remained vacant for many years and some occupiers are non-B-class businesses, suggesting that demand for further office or industrial units in this area is relatively modest. Gurnos Industrial Estate is a small node with moderate quality premises, well positioned near the A4067/A4068 roundabout (though not really visible from the roundabout). Its main market is industrial occupiers servicing the local residential community (e.g. auto services, locksmith, furnishings), though its largest occupier, Jabro Games, would be serving a wider market. Ystradgynlais Workshops and Business Centre and Ynyscedywn Enterprise Park and located alongside each other and appear to be meeting similar market needs, providing small, low-cost units for microbusinesses. Unit quality is basic to moderate, though the Ynyscedywn Enterprise Park has a more attractive amenity.

Market Area	Town	Comments
		Cae'r-bont Enterprise Park also has units of a basic quality, located in the north of Ystradgynlais along the A4067 (leading into BBNP). Once again the market is for local industrial needs.
Other	Church Stoke	Church Stoke is at the intersection of the A489 and A490, within the influences of both Welshpool and Shrewsbury. Its employment uses are dominated by the Montgomery Natural Spring Water Company, which has a bottling facility south of the A489 and alongside a Co-op. There are vacant employment allocations adjacent to the water company. Market opportunities are likely to be for expansion uses of the water company or localised SME uses. Larger uses are likely to gravitate to the larger centres.

Source: BE Group analysis, 2024

Summary

4.36 The regional and national economies are experiencing significant headwinds, which is impacting on business confidence. Increasing energy, labour and supply costs, due to the pandemic, energy crisis and political uncertainties have impacted businesses' operations and appetite to invest. However, the impacts have not been uniform across the economy. Industrial and warehouse demand was strong in 2021 and 2022 across Wales and the UK, primarily driven by e-commerce. This slowed in 2023, though Wales has registered good levels of take-up on the first half of 2024. The office market was significantly more negatively impacted by the pandemic, but saw a recovery in 2023 and key Welsh markets (Cardiff, Newport) have performed well in the first half of 2024. The increasing importance on premises with quality and flexibility remains a strong trend in the office market.

4.37 The employment land market in Powys has been driven for many years by the industrial and warehousing sector, primarily through small and medium business demand. Interest is for units 200-500 sqm (and generally in the lower part of that range), with Newtown and Welshpool the main focuses of market interest. In smaller markets, the unit size demand is generally smaller (100-200 sqm). Quality unit stock is taken up very quickly and development plots in good areas are also taken up quickly for mid-size units (c. 1,000 sqm).

4.38 The office market is a smaller volume market, dominated by transactions of small units (<100 sqm). However, there has been some notable investor interest in recent years within the County. Rents for office space are very modest and discourage developer investment in new stock.

4.39 Spatially, the Powys market has some localised differences, reflecting the connectivity to larger areas, local population size and economic interactions with the surrounding rural communities.

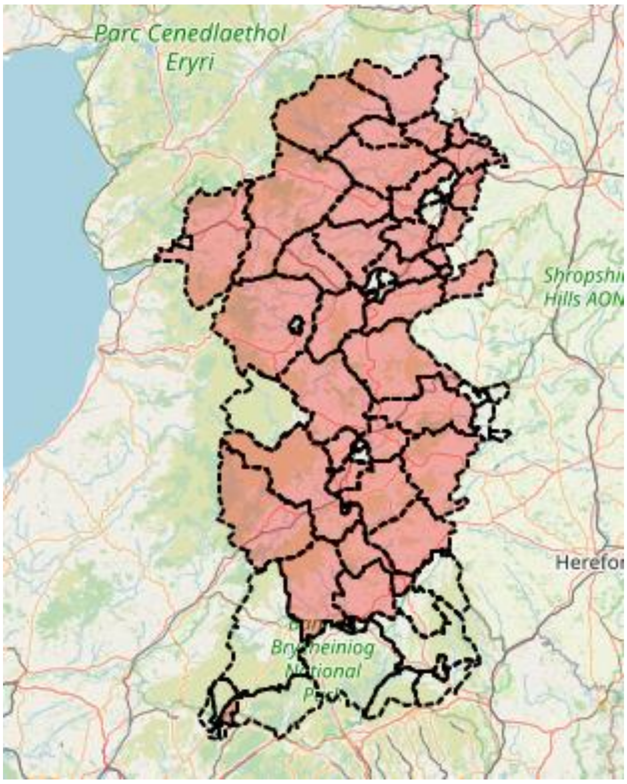
5.0 RURAL ECONOMY

5.1 The rural economy of Powys has been assessed to understand its composition and sectors. The rural economy is more than just agriculture, it is a multi-faceted, disparate mix of businesses also encompassing manufacturing, processing, tourism, retail and services. Furthermore, spatially the rural sector in Powys is not uniform, with significant difference throughout the County.

5.2 In analysing the rural economy, this study has looked at employment, business and residential data available at the fine-grain level (lower or middle super output areas; LSOAs/MSOAs). However, even within these smaller geographies, there can be differences in settlements and activity. This analysis has referred to the UK Government's Rural Urban Classification and looked at the geographies that have been classified as Village, Hamlet and Isolated Dwellings. These classifications are for statistical data gathering and analysis purposes and do not match the classifications used in the Powys LDP. The map below illustrates the LSOAs in the County of Powys (excluding BBNP) that have this classification. It is evident that this comprises the large majority of the area within the County and most of the LSOAs. This area represents an approximation of the rural economy area within Powys. However, it is only an approximation, with the rural economy having interrelations with the larger settlements within Powys (and beyond), such as for services – repairs, maintenance, supplies, professional services – and these relationships are critical to the overall economy of the County.

5.3 However, this chapter focuses on the rural areas and their composition and sectors.

Figure 10 – LSOAs that are Village, Hamlet and Isolated Dwellings



Sources: Nomis, using ONS data; Rural Urban Classification

Resident Population

5.4 The population of the LSOAs defined by the Government Statistical Service's Rural Urban Classification as Villages, Hamlets and Isolated Dwellings was some 61,900 persons as at the time of the 2021 Census. This represents about 57% of the total County population. Therefore, while defined as villages and hamlets, clearly there is significant dispersed population throughout these LSOAs, with populations in rural and semi-rural locations at fringes of the towns, as well as more isolated pockets of populations.

5.5 As seen in the analysis of the indices of deprivation in the Chapter 3.0 (see Figure 3), while overall there was only limited deprivation when assessing the WIMD, when looking at the housing and access to services index, there was considerably higher levels of deprivation in Powys, predominantly in the rural areas.

5.6 The ONS produce median house price data down to MSOA level, of which there are 15 in Powys (excluding four that are fully or predominantly in BBNP area). Of these, nine would be mostly with rural areas and the remaining six mainly comprising larger settlement areas. The average of the median house sale prices in rural Powys in the year ending March 2023 was £263,450, compared to the average of median prices in the larger settlements of £196,460 for the same period. Therefore, there is a premium for housing in rural areas, with the median some 34 percent above MSOAs representing larger settlements.

5.7 While this is a wealth benefit for those owning houses, it represents a significantly higher hurdle to enter the property market in rural areas in Powys than in the larger settlements.

5.8 The DWP's data on universal credit claimants is also available at a fine grain level and shows that within Powys, the MSOA's with the highest percentage of claimants are within Ystradgynlais, Newtown and Welshpool, with generally lower claimant levels in rural areas.

Employment

5.9 The table below provides a list of the sectoral employment within the rural LSOAs, based on BRES information. The table also provides an estimate of the percentage of the full County's employment in each sector. The BRES data does not include agricultural sector employment, which clearly is a key element of rural areas. However, it shows the mix of employment outside of farming. The data is provided to 2-digit SIC code levels, which provides details of the mix of employment types. At this small grain geographic and sectoral level, the data is rounded, recognising the uncertainty of the surveying data and excludes farm agriculture employment, clearly a significant element of the employment mix in a rural economy. However, it informs the analysis in highlighting key areas of strength of other employment types outside of agriculture in these rural LSOAs.

5.10 Overall, some 13,200 jobs were located within the LSOAs described as Village, Hamlet and Isolated Dwellings in 2022. This is some 23 percent of the total employment in Powys, a significant proportion of the total employment, given it is outside the key urban settlements. However, significantly lower than the proportion of the resident population that is within these LSOAs (57 percent). This is to be expected as the population gravitates towards the main centres for employment and services.

Table 22 – Employment by Sector – Rural Economy, 2022

Sector	Job Numbers (2022)	Percentage of Powys Employment
01 : Crop and animal production, hunting and related service activities *(BRES figures exclude farm agriculture at this level)*	175	Not included due to farm agriculture excluded from the LSOA level figures
02 : Forestry and logging	190	54%
03 : Fishing and aquaculture	0	0%
05 : Mining of coal and lignite	0	-
06 : Extraction of crude petroleum and natural gas	0	-
07 : Mining of metal ores	0	-
08 : Other mining and quarrying	190	95%
09 : Mining support service activities	0	-
10 : Manufacture of food products	570	46%
11 : Manufacture of beverages	120	34%
12 : Manufacture of tobacco products	0	-
13 : Manufacture of textiles	10	10%
14 : Manufacture of wearing apparel	0	0%
15 : Manufacture of leather and related products	0	-
16 : Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	195	39%
17 : Manufacture of paper and paper products	0	0%
18 : Printing and reproduction of recorded media	20	20%
19 : Manufacture of coke and refined petroleum products	0	-
20 : Manufacture of chemicals and chemical products	10	29%
21 : Manufacture of basic pharmaceutical products and pharmaceutical preparations	0	-
22 : Manufacture of rubber and plastic products	20	11%
23 : Manufacture of other non-metallic mineral products	80	53%
24 : Manufacture of basic metals	60	24%
25 : Manufacture of fabricated metal products, except machinery and equipment	290	32%
26 : Manufacture of computer, electronic and optical products	40	8%
27 : Manufacture of electrical equipment	300	50%
28 : Manufacture of machinery and equipment n.e.c.	20	5%
29 : Manufacture of motor vehicles, trailers and semi-trailers	110	63%
30 : Manufacture of other transport equipment	40	53%
31 : Manufacture of furniture	10	8%
32 : Other manufacturing	10	3%

Sector	Job Numbers (2022)	Percentage of Powys Employment
33 : Repair and installation of machinery and equipment	65	37%
35 : Electricity, gas, steam and air conditioning supply	5	5%
36 : Water collection, treatment and supply	10	10%
37 : Sewerage	10	20%
38 : Waste collection, treatment and disposal activities; materials recovery	10	13%
39 : Remediation activities and other waste management services. This division includes the provision of remediation services, i.e. the cleanup of contaminated buildings and sites, soil, surface or ground water.	10	7%
41 : Construction of buildings	375	47%
42 : Civil engineering	380	63%
43 : Specialised construction activities	610	49%
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	320	32%
46 : Wholesale trade, except of motor vehicles and motorcycles	525	26%
47 : Retail trade, except of motor vehicles and motorcycles	800	16%
49 : Land transport and transport via pipelines	865	49%
50 : Water transport	0	0%
51 : Air transport	10	13%
52 : Warehousing and support activities for transportation	10	4%
53 : Postal and courier activities	20	6%
55 : Accommodation	850	49%
56 : Food and beverage service activities	610	20%
58 : Publishing activities	0	0%
59 : Motion picture, video and television programme production, sound recording and music publishing activities	30	24%
60 : Programming and broadcasting activities	20	100%
61 : Telecommunications	0	0%
62 : Computer programming, consultancy and related activities	160	46%
63 : Information service activities	10	33%
64 : Financial service activities, except insurance and pension funding	0	0%
65 : Insurance, reinsurance and pension funding, except compulsory social security	0	-
66 : Activities auxiliary to financial services and insurance activities	10	4%
68 : Real estate activities	145	24%
69 : Legal and accounting activities	65	7%
70 : Activities of head offices; management consultancy activities	855	68%
71 : Architectural and engineering activities; technical testing and analysis	80	18%
72 : Scientific research and development	0	0%

Sector	Job Numbers (2022)	Percentage of Powys Employment
73 : Advertising and market research	0	0%
74 : Other professional, scientific and technical activities	70	31%
75 : Veterinary activities	70	28%
77 : Rental and leasing activities	80	13%
78 : Employment activities	280	93%
79 : Travel agency, tour operator and other reservation service and related activities	140	62%
80 : Security and investigation activities	0	0%
81 : Services to buildings and landscape activities	330	41%
82 : Office administrative, office support and other business support activities	170	21%
84 : Public administration and defence; compulsory social security	105	4%
85 : Education	1,255	36%
86 : Human health activities	280	11%
87 : Residential care activities	400	27%
88 : Social work activities without accommodation	200	11%
90 : Creative, arts and entertainment activities	40	27%
91 : Libraries, archives, museums and other cultural activities	40	11%
92 : Gambling and betting activities	0	0%
93 : Sports activities and amusement and recreation activities	220	22%
94 : Activities of membership organisations	70	12%
95 : Repair of computers and personal and household goods	0	0%
96 : Other personal service activities	125	28%
97 : Activities of households as employers of domestic personnel	0	-
98 : Undifferentiated goods- and services-producing activities of private households for own use	0	-
99 : Activities of extraterritorial organisations and bodies	0	-
Total	13,195	23%

Source: Nomis using ONS data, 2024

** where percentage is shown as '-', there is no recorded employment in the County in that sector*

5.11 The employment mix within these rural LSOAs has significant diversity. The largest sectors are mostly services for the local resident and visitor populations – education, accommodation, land transport, food and beverage, human health and retail trade. These generally do not or only have limited requirements for B-class employment land. However, they form the bulk of the foundational economy and demonstrate that the rural economy is significantly skewed towards these sectors, from an employment perspective. However, an example of a strong subsector that provides B-class employment would be the activities of head offices, management consultancy activities, which was estimated to provide some 855 jobs in 2022.

5.12 Manufacturing employment in the rural LSOAs is relatively narrow, focussed on food manufacturing, electrical products, fabricated metal and wood and wood products. There are clear links between the primary sectors and some of these manufacturing sectors (food and wood products).

5.13 Specialised construction activities, construction and civil engineering employment are significant employers in the rural LSOAs. Importantly, a substantial percentage of Powys's employment in these sectors (47-63%, compared to 23% of total employment) are located within the rural areas, reflective of the large land needs for storage of plant and equipment and the disparate locations of engineering projects.

5.14 The rural LSOAs also provide a significant proportion of the County's employment in sectors related to the tourism industry – accommodation (49%), food and beverage services (20%) and travel agency, tour operator and reservation services (62%) – reflecting that the features of the area that bring visitors to the area are the ability to connect to rural area and the natural beauty.

5.15 It is also apparent from the data that there is the presence of office-based sectors within the rural LSOAs across a range of office sectors, particularly for management consultancy, but also several other sectors to a smaller degree.

Service Centres for the Rural Population

5.16 The table below summarises the functions of some of the key centres that provide services for the rural population. Some of these centres are within the LSOAs defined as Villages, Hamlets and Isolated Residents, though not all. However, they provide service functions to this rural community. The town centres of these nodes would provide services for the surrounding residential and business communities. The table below provides information on the current and potential functions of employment nodes within these centres.

Table 23 – Key Centres Servicing Rural Economy

Centre	Function	Potential Opportunities
Machynlleth	Treowain Enterprise Park has some building suppliers, farm supplier and machinery services. The rural visitor economy is serviced by a mobile home supplier. Dyfi Eco Park has a renewable energy provider, mountain bike hire and Forest Wales. Example Businesses: CCF, Salop Leisure, Travis Perkins, Brodyr Evans Bros, Forest Wales, Dulas, Atherton Bikes	Potential sectoral specialisms, building on sustainable technology (linked to CAT) or food & beverage production. Potential to link with R&D at Aberystwyth. Further opportunities to service the rural tourism sector through suppliers or maintenance.
Llanidloes	Parc Hafren has a coach depot that services leisure markets. Parc Derwen Fawr has two artisan food producers/retailers and an energy consultancy service. Example Businesses: Rural Foodies, Andy's Bread, EnergyMGT, Celtic Travel	Potential to provide for some of Newtown's overflow needs. Opportunity to investigate further artisan food opportunities, including collaboration/co-operative options. Parc Hafren performing solidly and opportunity to expand this node with candidate site.
Rhayader	The East Street Industrial Estate has a small number of SMEs that would have relationships with the rural sector, including auto servicing that specialises in four-wheel drives and a renewables energy installer. It also contains a museum of the local area and a theatre. Rhayader Industrial Estate includes a animal and livestock vet and health provider, building supplier, machinery component manufacturer, metalworker. Example Businesses: Rhayader Renewables, Rhayader Four Wheel Drive, Gofannon Forge, RBS, CCF, Rhayader Animal Health.	Has some long-term occupiers (e.g. Compact Orbital Gears) but unclear what its employment position is. Not needed for an overflow role for Llandrindod Wells. WG allocation – lack of demand to bring this forward. Rhayader has a reasonable array of rural services in its employment areas. Opportunities for further occupiers servicing this sector are likely to be ad hoc.
Builth Wells	Builth Wells has important rural assets including Royal Welsh Showground and the Livestock Market. Irfon Enterprise Park's two largest occupiers are a vet and farm supplier. Example Businesses: Hay and Brecon Farmers, Builth Wells Veterinary Practice, Royal Welsh Showground, Builth Wells Livestock Market.	Rural connector between BBNP and Mid Wales. Rural economy hub – e.g. workshops for servicing machinery, suppliers, etc. and links to Royal Welsh Showground or Livestock Market to attract more permanent business presence. Link to visitor market. Appears to be underrepresented by rural-facing businesses compared to some of the other centres, especially when considering the showground and market assets in Builth Wells.
Three Cocks	Three Cocks has a good range of rural-facing businesses, including machinery servicing, suppliers, Land Rover dealership, fuel suppliers, adventure sports centre	Already established node of rural economy uses (machinery, supplies). Unlikely to expand, though should continue to support, given its location on A483 servicing BBNP and southern Powys.

Centre	Function	Potential Opportunities
	Example Businesses: Rees Agri Equipment, AE Evans and Daughters Coal Merchants, Bowketts Farm Supplies, Land Rover, Black Mountain Adventure	

Source: BE Group inspections and analysis, 2023

Summary

5.17 The rural economy is a substantial part of the of overall economy of Powys. It provides an array of services and facilities and breadth of employment opportunities. While the largest employment sectors within the rural LSOAs are predominantly focused on the foundational economy (e.g. education, health, accommodation, retail), there are also significant employment sectors more closely related to B-class employment uses, such as land transport, construction and manufacturing.

5.18 As seen above, the employment nodes servicing the rural sector include a diverse range of businesses, not just serving the agricultural sector, but also tourism, leisure, food production and energy. Further planning for employment nodes should take into account potential needs of businesses serving the rural sector. For example, machinery supplies and vehicle storage would require larger plots with significant hardstand and outdoor storage areas; farm suppliers would require larger units; maintenance services would require workshop units; food production would require clean workshop space, with potential for customer-facing spaces; consultancies would require office space.

6.0 EMPLOYMENT LAND ASSESSMENT

6.1 This chapter provides a review of the employment proposals allocated in the Adopted Local Development Plan on employment sites (Policy E1) and mixed-use employment sites (Policy E3).

6.2 These sites have been reviewed as to the appropriateness and potential for ongoing B-class employment uses for Powys. They have been critiqued and scored on a range of aspects that would be relevant to the sites' market attractiveness for employment uses.

6.3 Comment has also been provided on any existing permissions or current applications for the employment sites.

6.4 The realistically available area is a figure that excludes areas with environmental, flooding and other constraints.

6.5 This assessment is undertaken in Table 24 overleaf. A recommendation is provided in the table as to whether each site should be safeguarded or allocated for employment in the RLDP. The Welsh Government guidance is that employment allocations should not be rolled forward from previous LDP without evidence of their deliverability within the coming plan period.

6.6 Existing employment area safeguarded in the LDP (Policy E4) have been assessed for their on-going appropriateness for employment uses (Table 27). This includes scoring of sites against a consistent set of criteria.

6.7 Candidate sites put forward by submitters have also been assessed for their potential to provide further supply of land over the coming planning period (Table 28).

Table 24 – Employment Sites in Powys Adopted Local Development Plan (2011-2026)

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
P58 EA1	Woodland Business Park (Ystradgynlais)	Vacant land is located at the end of an industrial park. Sites are serviced and flat. The buildings are of good quality with a mixture of office and industrial uses. The site is located close to the town centre. **Landholders:** The National Assembly for Wales		Part B - 22/1854/FUL - The extension and alteration of an existing light commercial unit, to include new off-road parking provision. Status – Approved 13/03/2023 This was submitted by BMW Off Road Skills	Land has been available for several years without coming forward. However, as the land is within the business park and controlled by WG, it remains suitable to continue to allocate the land for employment.	**The site should be retained for employment purposes**. Potential for a mix of B-class units	2.31	1.28 ha (B1, B2 and B8) (Part A 0.53 + Part B 0.17 + Part C 0.58 ha)	Yes
P08 EA1/ P08 EC1	Wyeside Enterprise Park (Builth Wells)	The site is a serviced site with an existing access road adjacent to an existing industrial park comprising both office and industrial uses. The site is a reclaimed quarry site that has been prepared for development. Only employment land site available in Builth Wells. **Landholders:** The National Assembly for Wales	• River Wye Nutrient Neutrality • Site is on the edge of Flood Plain • Flood Zone 2 - Surface Water and Small Watercourses	No current planning applications	Plot C1 is currently in use for Smarts Transport's Builth Wells Depot. Although nothing has been built on the land, the land is now in B8 usage and has consequently been taken out of the realistically available figure.	**The site should be retained for employment use.** Potential for a mix of B-class units	1.2	0.49 ha (B2 and B8) Part of site already developed	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
P28 EA1	Heart of Wales Business Park (Llandrindod Wells)	The land is located adjacent to the A483 within an existing business park. The existing units are currently occupied by Minton's Good Food and Marches Business Group. Good amenity business park. **Landholders:** The National Assembly for Wales Unknown	• Mains Sewer cuts through the site restricting development area • River Wye Nutrient Neutrality • Trees on site • Flood Zone 2 and 3 - Surface Water and Small Watercourses	No current planning applications	Land has been available for several years without coming forward. However, as the land is within the business park and controlled by WG, it remains suitable to continue to allocate the land for employment.	**The site should be retained for employment use.** Potential for a mix of B1, B2 and B8.	3.9	3.23 (Part A 1.59 ha + Part B 1.64 ha) (B1, B2 and B8)	Yes
P51 EA1	Broadaxe Business Park (Presteigne)	The site is located five minutes away from the town centre directly off the B4355. All but a couple of small plots have been fully developed. **Landholders:** The National Assembly for Wales	• River Wye Nutrient Neutrality • Flood Zone 3 – Rivers and Sea	21/2306/FUL - Radnor Hills have full planning permission for the erection of two steel framed industrial buildings, each with a floor area of 463 sqm and associated infrastructure. This is on the top half of the site (0.29 ha). Status – Approved 27/07/2023 21/0702/FUL - Erection of a new workshop unit and	Broadaxe Business Park is a good quality employment node and while in a small market, it would be expected that the remaining plot would be taken up in due course.	**Site to be retained as existing employment area**	2.40	0.23 (0.52 – 0.29 ha = 0.23 ha) (B1, B2 and B8)	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
				all associated works. Status – Approved 02/11/2021. No work has began.					
P52 EA1	Brynberth Business Park (Rhayader)	No new developments on the site and no sign of any future construction occurring. The two sites in question are grassland and they have some sloped areas. It is located on the back of an enterprise park/ Industrial estate comprising basic quality units. **Landholders:** The National Assembly for Wales (2.1 ha); Unknown registration (1.6 ha)	• Flood Zone 3 – Rivers and Sea • Flood Zone 3 - Surface Water and Small Watercourses • River Wye Nutrient Neutrality • Sloped • Backlands site	No current planning applications	While there has been no interest for many years, alternative uses for the sites, which appear to require access through the existing business park, would be limited. Therefore, an employment use may remain the most appropriate outcome for these sites. A quantity of 3.7 ha appears to be substantial compared to local demand and while could be used to accommodate some specialised land-consumptive uses, is likely to be a long-term proposition.	**Retain for employment use** Likely to be a long-term prospect for B2 and B8	3.7	3.7 (B2 and B8)	Yes, though should continue to monitor prospects and opportunities for alternative uses. Potentially only the WG land could remain as an allocation
P35 EA1	Parc Busnes Derwen Fawr (Llanidloes)	The remaining vacant area on this site is serviced and ready for development. This site is located off A470 adjacent to office units built in 2007. The site is flat and serviced, suitable for future development. The surrounding buildings	• Registered Historic Landscape • Trees on site	No current planning applications	Two units are currently vacant on this park (one office and one warehouse) suggesting new development is currently unlikely. The development plot is within the existing park and appropriate for employment uses. While approvals are for B1 uses on the business park,	**The site should be retained for employment purposes.**	1.2	0.45 (B1)	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
		are in good quality. It would be suitable for future B1 use. **Landholders:** The National Assembly for Wales			consideration should be given to low impact, high quality workshops as well, which is more likely to be consistent with local demand.				
P35 EA2 / P35 EC1	Parc Hafren (Llanidloes)	Two small undeveloped plots. One likely too small and narrow to develop and the other is the remaining land at the rear of Hafren Furnishers and likely to be for their expansion needs rather than available to the wider market. **Landholders:** Hafren Furnishers Limited Celtic Travel (Llanidloes) Limited	• Size/shape • Prominence • Trees on site	23/0941/FUL - Erection of new maintenance building & MOT test facility at existing bus depot including change of use of land (east boundary) to extended associated curtilage. Applied – 20/06/2023. Status – Pending consideration.	The narrow, small plot is unlikely to be developable for employment uses.	**Developed areas to be retained as existing employment areas** There is 0.17 ha available but the access and size of the piece of land dictates that this would not be widely developable and would only represent expansion land for Hafren Furnishers	1.7	0 (B2 and B8)	Yes
P48 EA1	Llanidloes Road (Newtown)	This site is a vacant standalone area of land opposite an existing industrial estate. Neath Port Talbot College is located to the east of the site and owns this site. It is currently being used as grazing land.	• Flood Zone 3 – Rivers and Sea • Flood Zone 3 – Surface Water and Small Watercourses	No current planning applications	Represents expansion land for the college and employment opportunities that can be linked to the college, such as R&D uses, advanced manufacturing centre, etc.	**Retain for employment use, though likely that not all of site would used for B-class employment, with wider opportunities linked with the college.**	2.0 Site area could be enlarged if flood risk is addressed	2.0 (B1, B2 and B8)	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
		There are residential buildings to the north on the other side of a railway line. **Landholders:** Neath Port Talbot Further Education Corporation							
P02 EA1	Abermule Business Park (Abermule)	The site has been developed recently for a recycling bulking facility and two rows of business units. The recycling facility is awaiting a permit to begin operations while one row of units is occupied by CMD Makefast, a marine manufacturer. The remaining erected row is made up of six units, none of which appear in use. Site C, that has approval for the development of business units, is serviced but vacant with no construction having occurred there. **Landholders:** Powys County Council	• Flood Zone 2 - Rivers and Sea • Flood Zone 3 – Surface Water and Small Watercourses	P/2018/0587 - Hybrid application comprising of a full application for a proposed recycling bulking facility and associated works and an outline application for the erection of business units (B1/B2/B8) and all associated works. Status – Approved and mostly developed	It is understood that the remaining plot, site C, has been sold and will be developed in accordance with approvals.	**Retain for employment use**	2.6	0.52 (B1, B2, B8)	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
P12 EA1	Church Stoke (Church Stoke)	This site is owned by Delfin Investment Ltd. They also own the land to the south of the allocation. Montgomery Waters occupy a large modern unit to the south of the allocation. They have a carpark that is located within the site to the east. The vacant land to the west is slightly sloped. The buildings to the east of the allocation comprise of a Co-op and garden centre. The other units in this area are all industrial. **Landholders:** Delfin Investments Ltd	• The site lies within the Yr Ystog character area of the Vale of Montgomery registered historic landscape • Some sloping • Access/layout	No current planning applications	The sloping nature of some of the site may limit development opportunities. However, there remain development options to expand this node, providing for some localised demand and demand generated A489. Noted that adjacent sites have been brought forward as candidate areas for employment.	**Retain for employment use** Potentially can provide expansion land for Montgomery Waters, otherwise suitable for a range of B-class uses but demand is likely limited	1.28	0.64 ha (B2 and B8)	Yes
P57 EC1	Buttington Cross Enterprise Park (Welshpool)	This site is now fully developed. On the east there is a new Tuffins petrol garage/store and two new industrial units.		No current planning applications	No expansion opportunities likely.	**Site to be retained as existing employment area**	1.5	0	Yes
P59 EA1	Buttington Quarry	The east of this site has been developed into a new housing estate and primary	• Footpath • Past use as a quarry brings rise to	20/0445/REM - Section 73 application to vary condition 1	This site represents a longer-term option for Powys. As the largest individual site in the County,	**Retain for employment use**	6.0	6.0 (B1, B2 and B8)	Yes, though would need to work with landholders to

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
	(Trewern)	school. Land to the east remains the same – vacant land. There is no evidence of employment uses at the site. **Landholders:** Unknown	potential contamination issues • Heavily sloped • Flood Zone 3 - Surface Water and Small Watercourses • Expansion is dependent on new access • The site is adjacent to a geological SSSI so future design must be sympathetic to this	attached to planning permission P/2014/1318 to extend the time limit for extraction of material to 31st May 2025. Status – Approved 23/07/2020 20/0575/REM - Section 73 application to vary condition 1 of permission P/2015/0439 in relation to an extension of time. Status – Approved 24/09/2020	it is important that the site can be delivered. Opportunities are for a mix of B-class employment uses, though dependent on regeneration of site. Can provide for mid and larger units if required.				explore delivery options, including infrastructure requirements and masterplanning.
P60 EC1	Offa's Dyke Business Park (Welshpool)	Two vacant plots on a site with significant recent development. The business park is well located on the A458 and contains regionally important businesses including YASA, Zip Clip, Invertek Drives, Dynacast and Charlies Stores. **Landholders:** Dynancast (UK) Limited	• Footpath • Site close to Flood Plain • Site of Special Scientific Interest (SSSI) • Special Area of Conservation • Sloped site (part)	No current planning applications 21/1738/FUL - Erection of an industrial unit with associated roadway, landscaping and parking. Status – Application Withdrawn 01/02/2022	Readily developable site, seeing recent significant development. Continue to encourage B2/B8 units at this site and consider options for expansion opportunities outside of the existing allocation area.	**Developed areas to be retained as existing employment areas** **Retain for employment use**	7.3	1.11 Plot C4 0.57ha Plot C9 0.54ha (B1, B2 and B8)	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
		The Welsh Ministers Roger Samuel Jones (Mines and Minerals)		21/1716/FUL - Industrial unit with associated roadway, landscaping and parking. Status – Application Withdrawn 01/02/2022					
P18 EA1	Four Crosses (Four Crosses)	The remaining area of this site is owned by Riverside Holdings Ltd. The site is located adjacent to industrial units and already has an existing entrance to the land. It is likely the remaining area will be used for NIBS' expansion purposes. **Landholders:** Riverside Holdings Ltd	• Trees on site	No current planning applications	Suitable for development, though small nature of remaining site would limit market opportunities. NIBS, as the existing largest occupier have expanded over time and appear most likely option to take this land.	**Retain for employment uses**	0.5	0.21 ha (B2 and B8)	Yes
P42 EA1	Treowain Enterprise Park (Machynlleth)	This site is separate but located next to an office business park. It is grassland currently in use for grazing. The land has a private occupier. The site is relatively flat.	• Site is located within setting of Plas Machynlleth a registered historic park and garden		Two industrial units have been built on part of the site in recent years. Further uses are likely to be small scale industrial units.	**Retain for employment use**	1.7	1.26 ha (B2 and B8)	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
		Landholders: Julian Charles Dugdale Fenwick							
Mixed-use Sites									
P21 MUA1	Gypsy Castle Land (Hay-on-Wye)	This mixed-use allocation is located adjacent to a housing estate. There are other business parks around comprising office and industrial buildings suggesting there is a market for such uses in the area. The land is in good quality, it is in a good location at the edge of the town centre off a busy road (B4350). **Landholders:** Jeffrey Llewelyn Davies	• River Wye Nutrient Neutrality • Registered Historic Landscape • Highways new junction with the county class II road will be required along with the stopping up for vehicular use of sections of the existing Gypsy Castle Lane • Surface water flooding issue - improvements required	No current planning applications Previous interest in residential care home and live/work units.	Potential to provide good quality small units to meet local and surrounding needs, including exploring opportunities for R&D needs linked with Herefordshire.	**Retain for employment use** Potential uses likely to be small to mid B2 and B8 uses, with supporting B1.	2.4	2.4 (B2 and B8) 4.21 ha total	Yes
P53 MUA1	Land adj. Gwernyfed Avenue (Three Cocks)	This site is located just off the A438. The site has an allocation for employment and housing. The employment part has been built and is	• River Wye Nutrient Neutrality • Registered Historic Landscape	P/2016/0786 - Reserved Matters application for 39 dwellings, 9 commercial units, and associated infrastructure	Employment uses built out	**Site to be retained as existing employment area**	3.4	0	Yes

Site Ref.	Site Name (Settlement)	Site Description	Constraints	Intended Development Planning Permissions / Candidate Site Submissions	Comments	Recommendations	Site Size, ha - Baseline	Site Size, ha – Realistically Available for B1/B2/B8 Use (Anticipated Land Use – B1/B2/B8)	Should the site be safeguarded or allocated for employment uses?
		partially occupied. The remaining land is to be developed for housing with water works are currently underway.		following outline consent P/2016/0786. Status – Powys website says pending consideration however site inspection found the 9 commercial units standing and some occupied.					

Sources: Adopted Local Development Plan, planning applications, BE Group assessment, 2024

6.8 Table 25 below summarises the employment allocation sites that have some realistically developable employment land. **The total realistic supply of employment land in Powys is 23.52 ha, comprised of 21.12 ha of employment sites and 2.40 ha of Mixed-Use Sites (employment component only)**. This realistic supply on allocated sites does not necessarily mean that there is an extant employment use planning permission on the site. Vacant allocated land with extant planning permission totals 8.16ha. Allocations without planning permission will have to be reconsidered for inclusion in the Replacement LDP.

Table 25 – Powys Adopted LDP Employment Allocations with Realistically Developable Land

Site Ref.	Site Name	Area (Ha)	Type of Employment Site	Realistic Supply for B-Class Uses (Ha)	Supply with Planning Permission (2024) (ha)
Employment Sites					
P58 EA1	Woodland Business Park, Ystradgynlais	2.31	B1, B2, B8	1.28	1.28
P08 EA1/ P08 EC1	Wyeside Enterprise Park, Builth Wells	1.2	B2, B8	0.49	0.49
P28 EA1	Heart of Wales Business Park, Llandrindod Wells	3.9	B1, B2, B8	3.23	3.23
P51 EA1	Broadaxe Business Park, Presteigne	2.4	B1, B2, B8	0.23	0.23
P52 EA1	Brynberth Business Park, Rhayader	3.7	B2, B8	3.7	0
P35 EA1	Parc Busnes Derwen Fawr, Llanidloes	1.2	B1	0.45	0.45
P35 EA2 / P35 EC1	Parc Hafren, Llanidloes	1.7	B2, B8	0	0
P48 EA1	Llanidloes Road, Newtown	2	B1, B2, B8	2	0
P02 EA1	Abermule Business Park, Abermule	2.6	B1, B2, B8	0.52	0.52
P12 EA1	Church Stoke, Church Stoke	1.28	B2, B8	0.64	0.64
P57 EC1	Buttington Cross Enterprise Park, Welshpool	1.5		0	0
P59 EA1	Buttington Quarry, Trewern	6	B1, B2, B8	6	0
P60 EC1	Offa's Dyke Business Park, Welshpool	7.3	B1, B2, B8	1.11	1.11
P18 EA1	Four Crosses, Four Crosses	0.5	B2, B8	0.21	0.21
P42 EA1	Treowain Enterprise Park, Machynlleth	1.7	B2, B8	1.26	0
Mixed-Use Sites – Employment Component					
P21 MUA1	Gypsy Castle Land, Hay-on-Wye	2.4	B2, B8	2.4	0
P53 MUA1	Land adj. Gwernyfed Avenue, Three Cocks	3.4		0	0
Totals		**45.09**		**23.52**	**8.16**

Sources: Adopted Local Development Plan, planning applications, BE Group assessment, 2024

6.9 The only site remaining of significant size is Buttington Quarry, 6.0 ha, making up a quarter of the land available. This is a heavily constrained site, that will likely only contain lower order employment uses. The lack of significant land sizes (>5 ha) that are readily developable is an important shortcoming of the supply of employment land in Powys. Most sites have only small quantities of realistically available employment land, which would limit options for development of these sites and would be less attractive to developers, which are likely to prefer larger sites for more comprehensive development schemes.

Site Grading

6.10 All Adopted LDP employment allocations with available land have been graded using a standard scoring system (see Appendix 1) to objectively grade the suitability of each site for employment uses. Those sites with no realistically available land are not included. Results are provided in Appendix 2 and summarised below.

Table 26 – Existing Employment Safeguarding Areas - Sites Scoring

Site Ref.	Site Name	Realistic Supply for B-Class Uses (Ha)	Total Score, Max 100
Employment Sites			
P58 EA1	Woodland Business Park, Ystradgynlais	1.28	61
P08 EA1/ P08 EC1	Wyeside Enterprise Park, Builth Wells	0.49	59
P28 EA1	Heart of Wales Business Park, Llandrindod Wells	3.23	71
P51 EA1	Broadaxe Business Park, Presteigne	0.23	69
P52 EA1	Brynberth Business Park, Rhayader	3.7	47
P35 EA1	Parc Busnes Derwen Fawr, Llanidloes	0.45	65
P48 EA1	Llanidloes Road, Newtown	2	68
P02 EA1	Abermule Business Park, Abermule	0.52	79
P12 EA1	Church Stoke, Church Stoke	0.64	49
P59 EA1	Buttington Quarry, Trewern	6	30
P60 EC1	Offa's Dyke Business Park, Welshpool	1.11	71
P18 EA1	Four Crosses, Four Crosses	0.21	56
P42 EA1	Treowain Enterprise Park, Machynlleth	1.26	66
Mixed-Use Sites – Employment Component			
P21 MUA1	Gypsy Castle Land, Hay-on-Wye	2.4	55
Totals		**23.52**	**-**

Source: BE Group, 2024

6.11 The highest scoring site is Abermule Business Park, reflecting its strong positioning on the A483 between Welshpool and Newtown, the quality of the development on the surrounding business park and the fact that it is serviced and has planning already place. The next highest scoring sites were the Heart of Wales Business Park and Offa’s Dyke Business Park. Both allocations are located within good quality estates and are well located, however they both have a number of constraints to overcome. It is noted that Abermule Business Park and Offa’s Dyke Business Park are both reaching capacity and thus further sites are required of a similar quality and location (i.e. within the A483 Spine North commercial market area) to provide for the next phase of growth.

Existing Employment Areas

6.12 This section reviews the existing employment areas in Powys for their on-going appropriateness for employment uses. The analysis of these sites has considered factors such as condition of premises, vacant premises, market attractiveness and location.

6.13 The table overleaf provides a summary of each existing employment safeguarding area in Powys. The table includes site scoring for each area, based on similar scoring that was undertaken for the employment sites, but also incorporating an assessment of the existing premises and external areas. Each site is scored out of 90. This is a means of assessing and comparing the sites, through a grading of several qualitative factors.

6.14 The analysis includes a recommendation as to whether the area should continue to be safeguarded for employment uses in the RLDP.

Table 27 – Existing Employment Safeguarding Areas – Assessment Summaries

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
P08 ES1	Irfon Enterprise Park (Builth Wells and Llanelwedd)	Estate visible from the A483 made up of three buildings. Hay and Brecon Farmers and Builth Wells Veterinary Practice both occupy buildings and share the same access point. The remaining building was formerly a DPD depot which has recently closed and is now occupied by multiple small occupiers in including JM Details (Car Body Shop) and Pampered Paws (Pet Groomer). Multiple occupiers now sharing the premises, parking and access has become more constrained. Safeguarded employment site in Adopted LDP (Policy E4)	54	**Continue to safeguard site for employment**
P08 ES2	Wyeside Enterprise Park (Builth Wells and Llanelwedd)	Moderate quality industrial and office units sitting on the A481 with wide roads and adequate on-site parking. A key occupier is, meat wholesaler, The Burger Manufacturing Company who own Unit 1 and 3 on the park, as well a small piece of spare land (0.2 ha). Crown Plastic Mouldings occupied Unit 4 on the site previously however they have been attempting to let out this space since February 2022. Demand on the Enterprise Park suffers due to the lack of visibility from the A-road and the fact that the A-road it is positioned on is not a major route. Employment sites P08 EA1 and P08 EC1 are within Wyeside Enterprise Park Safeguarded employment site in Adopted LDP (Policy E4)	51	**Continue to safeguard site for employment**
P24 ES1	Knighton Enterprise Park (Knighton)	Modern industrial estate made up of three units, sitting on the A4113 and servicing a local market. Occupiers include CCF, Brixton Pottery and a car mechanic. Potential expansion areas to west and north (outside of safeguarded site area). Safeguarded employment site in Adopted LDP (Policy E4)	57	**Continue to safeguard site for employment**
P28 ES1	Ddole Road Industrial Estate (Llandrindod Wells)	Well-occupied estate with a mixture of offices and industrial units. Most sites have off-street parking, however there is the presence of on-street parking that can obstruct flows of traffic. Located approximately 0.3 km away from an A483 junction, the site is strongly located, yet it lacks prominence. The estate is home to the offices of a number of non-profit organisations, hydrogen car manufacturer, Riversimple and a Countrywide Freight Group depot. Marches Business Group have a large footprint on the estate occupying units 23 and 24, a showroom unit and a recently built warehouse. 20/1594/FUL - Proposed Warehouse/Storage Building and associated works. 700 sqm B8 unit has been constructed as an extension to Marches Business Group's footprint on the estate. Safeguarded employment site in Adopted LDP (Policy E4)	62	**Continue to safeguard site for employment**

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
P28 ES2	Heart of Wales Business Park (Llandrindod Wells)	Good quality business park that is home to Mintons Good Food and Marches Business Group along with a hub of civic uses including a fire station, police station and magistrate's court. WG-owned and developed site, though remaining plots (employment land allocation P28 EA1) have been undeveloped for several years, with no apparent demand for similar uses in this location No planning applications Employment land allocation P28 EA1 is located within Heart of Wales Business Park. Safeguarded employment site in Adopted LDP (Policy E4)	81	**Continue to safeguard site for employment**
P42 ES1	Dyfi Eco Park (Machynlleth)	Sitting strategically on the outskirts of Machynlleth with good access to the A487 and the railway station, Dyfi Eco Park contains a number of office buildings along with some industrial uses. Businesses here include Dulas, who deliver renewable energy solutions, Organic Textile Company, Atherton Bikes and National Rail. Access to the estate will soon be improved as the New Dyfi Bridge will help alleviate the flooding problems plaguing the current bridge. No planning applications Safeguarded employment site in Adopted LDP (Policy E4)	62	**Continue to safeguard site for employment**
P42 ES2	Treowain Enterprise Park (Machynlleth)	Industrial estate with units of mixed quality. Storage services can be found there along with a Royal Mail delivery office. Non-B-class uses are prevalent with CCF and Travis Perkins taking up large units. The fact that the estate is located near the centre of Machynlleth leaves it vulnerable to congestion while the road used to access the estate from the A489 is narrow and prone to on-street parking. 21/1702/FUL - One and half storey industrial unit with associated roadway, landscaping and parking 21/1663/FUL - Erection of 2No. Semi-detached industrial units. Welsh Government recently built two rows of net-zero industrial units, comprising three units in total. The semi-detached unit is made up of two 230 sqm units while the detached unit is 525 sqm in total. Both buildings have been constructed. . Employment allocation P42 EA1 is adjacent to the Enterprise Park. Safeguarded employment site in Adopted LDP (Policy E4)	58	**Continue to safeguard site for employment**
P48 ES1	Dyffryn Enterprise Park (Newtown)	Older industrial estate that has access to, and is visible from, Pool Road in Newtown and sits very close to a junction onto the Newtown Bypass. Notable occupiers include CMD Makefast and Charlies Stores. The estate has a good provision of on-site parking, leaving roads clear and free of congestion. No planning applications within the allocation but an outline planning application for B1/B8 units immediately to the east of the estate was rejected March 2023. Safeguarded employment site in Adopted LDP (Policy E4)	61	**Continue to safeguard site for employment**

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
P48 ES2	Mochdre Enterprise Park (Newtown)	Important industrial estate in the region with access to the Newtown Bypass. The estate contains a number of important manufacturers such as Nidec (Automation) and Cell Path (Lab Equipment supplier) while Border Holdings UK Ltd occupy the largest building on the estate. The estate is also home to a number of trade counter and motor repair shops as well as a few small office buildings. No planning applications within the application Vacant plots include a small plot adjacent to Unit 33 and plots adjacent to Border Holdings' unit. Immediately outside the allocation there is a planning application, 23/0577/FUL, for a change of use from agricultural land in order to erect an innovation and assembly centre by Reeco Automation, who own the adjacent building, approved. Safeguarded employment site in Adopted LDP (Policy E4)	67	**Continue to safeguard site for employment**
P48 ES3	Vastre Enterprise Park (Newtown)	Older industrial estate with a mixture of unit sizes including larger units occupied by DPD and Pear Stairs, Boys and Boden owned staircase manufacturer and smaller workshop units occupied by local businesses. The estate has good access to Pool Road and also a junction to the Newtown Bypass but the estate is not prominent in terms of visibility. An industrial unit and office unit are advertised online here as vacant while the site inspection found some workshops that did not appear to be in active use. No planning applications One vacant sloped plot of land on the entrance to the park. Safeguarded employment site in Adopted LDP (Policy E4)	52	**Continue to safeguard site for employment**
P48 ES4	St Giles Technology Park (Newtown)	Moderate quality office estate situated on Pool Road home to Nidec's global headquarters and a number of smaller offices occupied by the likes of NFU Mutual (insurance company) and WR Partners (accountants). No planning applications Safeguarded employment site in Adopted LDP (Policy E4)	48	**Continue to safeguard site for employment**
P35 ES1	Parc Hafren (Llanidloes)	Small industrial estate with direct access onto the A470. The main occupiers are coach provider Celtic Travel and Parc Hafren Furnishers. 23/0941/FUL - Erection of new maintenance building & MOT test facility at existing bus depot including change of use of land (east boundary) to extended associated curtilage. Approved Employment allocations P35 EA2 and P35 EC1 **are** within Parc Hafren though these small plots of land have limited development potential. Safeguarded employment site in Adopted LDP (Policy E4)	52	**Continue to safeguard site for employment**

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
P35 ES2	Parc Busnes Derwen Fawr (Llanidloes)	This business park opened in 2007 and contains B1 uses. The buildings are of good quality with notable occupiers including Siemens Gamesa and Deutsche Windtechnik, both operating in the renewable energy industry. However, site appears quiet and further demand for the development plots appears to be muted. Employment allocation P35 EA1 is within the business park area. Safeguarded employment site in Adopted LDP (Policy E4)	61	**Continue to safeguard site for employment**
P51 ES1	Presteigne Industrial Estate (Presteigne)	Located on the B4355, this business park is some distance away from a major A-road but being centrally located within Presteigne, it performs a local function. Insufficient on-site parking here, sees the roads obstructed by road parking. Notable occupiers include drilling contractor WB + AD Morgan and health manufacturer Winncare as well as a number of non-B-class uses. No planning applications Safeguarded employment site in Adopted LDP (Policy E4)	51	**Continue to safeguard site for employment**
P51 ES2	Broadaxe Business Park (Presteigne)	Located on the B4355, this business park is some distance away from a major A-road but being centrally located within Presteigne, it performs a local function. This business park has seen a number of new developments in recent years, focused on the end of the estate. Occupiers include construction companies and building suppliers. 21/2306/FUL - Radnor Hills have full planning permission for the erection of two steel framed industrial buildings, each with a floor area of 463 sqm and associated infrastructure. This is on the top half of the site (0.29 ha). Status – Approved 27/07/2023 21/0702/FUL - Erection of a new workshop unit and all associated works. Status – Approved. P51 EA1 is an employment allocation within Broadaxe Business Park. Safeguarded employment site in Adopted LDP (Policy E4)	58	**Continue to safeguard site for employment**
P52 ES1	East Street Enterprise Park (Rhayader)	Basic quality units with two access points off the A44. One access point fits a single car and the main access is slightly wider but narrowed by on-street parking. Occupiers include building material suppliers and motor related uses. No current planning applications. Safeguarded employment site in Adopted LDP (Policy E4)	53	**Continue to safeguard site for employment**
P52 ES2	Brynberth Enterprise Park (Rhayader)	Basic quality units with access off the A44. Occupiers include Welsh Royal Crystal, Compact Orbital Gears, M Morgan Lloyd Funeral Directors and a CCF store. No current planning applications. P52 EA1 employment allocation is within Brynberth Enterprise Park. Safeguarded employment site in Adopted LDP (Policy E4)	65	**Continue to safeguard site for employment**

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
P53 ES1	Three Cocks Industrial Estate (Three Cocks)	Located on the A438 with visibility from the road. Occupiers provide agricultural equipment, car repairs and storage services. No current planning applications. Safeguarded employment site in Adopted LDP (Policy E4)	60	**Continue to safeguard site for employment**
P53 ES2	Javel Industrial Estate (Three Cocks)	Located on the A438 with visibility from the road. The oil depots of Certas Energy and Oil4Wales are located here along with a row of multi-let industrial units and a Land Rover Car Dealership. No current planning applications. Safeguarded employment site in Adopted LDP (Policy E4)	56	**Continue to safeguard site for employment**
P57 ES1	Severn Farm Enterprise Park (Welshpool)	A well-located estate in Welshpool sitting adjacent to the railway station with access to the A483. The stock here is mainly older and industrial, however a modern business centre, Severn Business Centre, is present offering smaller serviced offices. BSW Timber Solutions are a key occupier on the site with multiple locations on the park. Most sites have on-site parking but there is still the presence of road parking in places. No current planning applications. Safeguarded employment site in Adopted LDP (Policy E4)	62	**Continue to safeguard site for employment**
P57 ES2	Henfaes Lane (Welshpool)	Sitting immediately north of Severn Farm Enterprise Park, Henfaes Lane is also well located in terms of A483 and railway station access. The stock here is also older but generally in good condition. Like Severn Farm, the stock here is mainly industrial but there is a good quality serviced office building present, Glynton House, present. The Potter Group (waste management) is a key occupier with a large site that has been expanded and renovated over the years. No current planning applications. Safeguarded employment site in Adopted LDP (Policy E4)	63	**Continue to safeguard site for employment**
P57 ES3	Buttington Cross Enterprise Park (Welshpool)	Located a junction between the A483 and A458 this business park has strong links to Shrewsbury, Oswestry, Welshpool and Newtown. The estate has recently been built out with a Tuffins service station and a premises newly constructed for PYC, house builders. Important occupiers are located on the park, including Wipak and Morland. No current planning applications. Safeguarded employment site in Adopted LDP (Policy E4)	64	**Continue to safeguard site for employment**
P60 ES1	Offa's Dyke Business Park (Welshpool)	The business park is well located on the A458 near an intersection with the A483 and consequently, like Buttington Cross, this business park has strong links to Shrewsbury, Oswestry, Welshpool and Newtown. The location has attracted regionally important businesses including YASA (electric vehicle manufacturer) , Zip Clip (wire suspension manufacturer), Invertek Drives (Variable frequency drive manufacturer), Dynacast (Metal component manufacturer) and Charlies Stores (large independent retailer) who all occupy modern premises.	68	**Continue to safeguard site for employment**

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
		No current planning applications Employment allocation P60 EC1 is within Offa's Dyke Business Park. Safeguarded employment site in Adopted LDP (Policy E4)		
P32 ES1	Llanfyllin Industrial Estate (Llanfyllin)	This estate is located in a remote location, far from major routes and comprises one large manufacturing unit, in excess of 240,000 sqft (22,297 sqm), occupied by Marrill Group. Marrill Group have sites in Coventry and Gateshead but this site specialises in assembly solutions. The site was formerly a facility of stadco, US defence and national security aerospace contractors. No current planning applications Safeguarded employment site in Adopted LDP (Policy E4)	57	**Continue to safeguard site for employment**
P18 ES1	Four Crosses (Four Crosses)	This estate is located within the Four Crosses settlement area. It is located just off the B4393, less than 1 km from an A483 junction. A major occupier is Northern Industrial Battery Services who have a good quality premises which they have recently expanded. The surrounding uses are of more basic quality but the park is tidy and has adequate on-site parking. Employment allocation P18 EA1 is the remaining plot within Four Crosses. Safeguarded employment site in Adopted LDP (Policy E4)	52	**Continue to safeguard site for employment**
P58 ES1	Cae'r-bont Enterprise Park (Ystradgynlais)	This estate is located on the A4067 and has Norton's (construction company) as a key occupier. Aside from Norton's premises this estate is comprised of older, low quality light industrial/workshop premises. Safeguarded employment site in Adopted LDP (Policy E4)	48	**Continue to safeguard site for employment**
P58 ES2	Ynyscedwyn Industrial Estate (Ystradgynlais)	Located either side of the Ystradgynlais Workshops this industrial park has access to the A4067. This estate contains older stock and performs the function of providing affordable space for local occupiers. While the estate does not contain great quality stock, occupancy levels are high. No current planning applications Safeguarded employment site in Adopted LDP (Policy E4)	50	**Continue to safeguard site for employment**
P58 ES3	Ystradgynlais Workshops (Ystradgynlais)	Older industrial estate with access to the A4067. The estate provides small workshop premises, mainly 250-1,000 sqft (23-93 sqm) to local businesses. Like Ynyscedwyn Industrial Estate, the units are well occupied despite being of low quality. Access and parking on this site could potentially be chaotic.	45	**Continue to safeguard site for employment. Encourage**

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
		No current planning applications Safeguarded employment site in Adopted LDP (Policy E4)		**refurbishment of units.**
P58 ES4	Gurnos Industrial Estate (Ystradgynlais)	Estate comprising three rows of multi-let industrial units. The estate has access to the A4068 and is close to an intersection with the A4067. The estate is well-occupied with Jabro Games (games machine suppliers) and a motor repair centre being the key occupiers. No current planning applications Safeguarded employment site in Adopted LDP (Policy E4)	50	**Continue to safeguard site for employment**
P58 ES5	Woodlands Business Park (Ystradgynlais)	Good quality estate with a mixture of office and industrial uses. The is located near an A4068 and A4067 junction and close to the town centre. Current occupiers include three businesses in the motorcycle business while CME have recently taken up space for their plant hire and storage business. Part B - 22/1854/FUL - The extension and alteration of an existing light commercial unit, to include new off-road parking provision. Status – Approved 13/03/2023 This was submitted by BMW Off Road Skills 22/0957/FUL - Relocation of an existing business due to new domestic development on current site. Business is to include storage, plant hire, office and transport. Status – Approved 07/11/22 Employment allocation P58 EA1 is the remaining plot within Woodlands Business Park at the end of the estate. Safeguarded employment site in Adopted LDP (Policy E4)	64	**Continue to safeguard site for employment**
	Abermule Business Park (Abermule)	Recently this site has been developed for a recycling bulking facility and two rows of business units. Creating a new employment area. The recycling facility is awaiting a permit to begin operations while one row of units is occupied by CMD Makefast, a marine manufacturer. The remaining erected row is made up of six units, none of which appear in use. This area appears to be taking some of the overflow demand from Newtown. P/2018/0587 - Hybrid application comprising of a full application for a proposed recycling bulking facility and associated works and an outline application for the erection of business units (B1/B2/B8) and all associated works. Status – Approved Full site is employment allocation P02 EA1. Recommend to safeguard build employment areas in RLDP.	69	**Add site to safeguarded list**

Site Ref	Site (Settlement)	Comments	Site Scoring, Max 90	ELR Recommendation for the RLDP
	Land adj. Gwernyfed Avenue (Three Cocks)	This site was allocated in the LDP for mixed use development. An approval was granted for the construction of 9 commercial units and 39 dwellings. The employment has been developed, creating a new employment area. Located just off the A438, the site contains 9 newly constructed good quality industrial units. All units are not yet fully occupied but current occupiers include JC Griffths and Son (Agricultural engineers), Tailored Imports (Import specialists) and SGG Project Management (Construction company).	60	**Add site to safeguarded list**

Sources: Powys CC, BE Group 2024

6.15 Heart of Wales Business Park scored the highest of all premises, with a score of 81. It scored highly across all areas in particular in terms of its access to public transport and its scope for expansion.

6.16 **Importantly, at this time, it is not recommended that any existing employment node is deallocated/not safeguarded for employment in the emerging RLDP.** The existing employment areas appear to provide good or adequate economic functions, either at a local or wider level, and renewal into other non-B-class employment uses would not be appropriate at this time.

Replacement LDP Candidate Sites Proposed for Employment Use

6.17 Powys County Council has provided a list of candidate sites that have been promoted by landholders to be considered for employment or mixed-use sites in the emerging RLDP. These sites have been critiqued by BE Group for the potential for development for employment uses within the lifetime of the RLDP. This critique is from a market and deliverability perspective, and it is recognised that several other factors would be considered in determining the final list of additional sites for employment, including flooding, ecology, transport, access, engineering works, etc.

Table 28 – Replacement LDP Candidate Sites Proposed for Employment Use

Candidate Site Ref.	Site Name	Site Description	Size for Employment (ha)	Proposed Uses	Market Comments	Should the site be further considered for employment?
184	Land adjacent to Kerry Roundabout, Newtown	Industrial/ commercial: B1, B2 and B8. Consideration given to A2 use for out of town services such as vets, etc similar to that at St Giles or Ludlow Eco Park. Some parts of the Candidate Site are sloping and be reserved for biodiversity enhancements. High profile site of significant scale provides potential for a range of uses in Newtown, which is currently a very constrained market.	18.4	Employment, Green Infrastructure / Open Space	Location at the Kerry Rd roundabout and the Newtown bypass provides an opportunity for a gateway site for Newtown, with potential to attract significant occupiers. Separation from main town is a limiting factor, though unlikely to deter potential occupiers. Water course and sloping of site likely to reduce overall yield (significantly less than 18.4 ha), though net area likely to be attractive to market.	Yes
241	Charlies Stores, Buttington	Extension of Offa's Dyke Business Park for additional warehousing Unit. Need to secure access to the site, either through another candidate site (site 366) or through the existing business park	3.75	Employment	Good site and reasonable extension area to Offa's Dyke BP, which is nearly complete and has proven popular for the market. Likely to require access from the north, which is another candidate site.	Yes, if northern site is also allocated.
299	Land to the north of Parc Hafren Industrial Estate, Llanidloes, SY18 6RB	Erection of up to 20,000sqm commercial unit floorspace (Use Class B1, B2, and B8) and ancillary uses, with associated infrastructure.	4.53	Employment	Reasonable site, though scale of site is large for Llanidloes. Appropriate site for extension of Parc Hafren. Perhaps a staged approach to development of the site would be appropriate	Yes
304	Land adjoining Black Mountain Business Park, Three Cocks	Site proposed for employment uses, would be accessed from A4078, near junction with A438.	5.16	Employment	Reasonable extension site for Black Mountain Business Park, though likely to be a long-term take-up. Potential opportunities to meet further rural economy demand, enhancing current Three Cocks function.	Yes
317	Land at Four Crosses	Commercial development	1.2	Employment, Transport Infrastructure	Land as a potential expansion area of the employment node at Four Crosses. Flat site, potential	Yes

Candidate Site Ref.	Site Name	Site Description	Size for Employment (ha)	Proposed Uses	Market Comments	Should the site be further considered for employment?
					for some small employment units.	
354	Land West of Montgomeryshire Natural Spring Water Co Church Stoke	Employment Land	3.3	Employment	Potential for expansion of the existing node at Church Stoke, including part of the existing allocation and extending further. Some sloping on site and likely to be only moderate demand. Access likely to use existing point.	Yes
355	Land South of Montgomery Natural Spring Water, Church Stoke, Powys, SY15 6AR	Employment Land	3.7	Employment	Potential for expansion of the existing node at Church Stoke, Lacks prominence from the A489, with likely to use existing point. More likely to be extension opportunity for water company, rather than independent use.	Yes
366	North Field adjacent to Offa's Dyke Business Park	Extension to Offa's Dyke Business Park for high quality B1 and B8 use. The split between B1 and B8 use is indicative only. The final user (or developer) will make proposals within the planning application process.	5.38	Employment	Very good option for extension of Offa's Dyke Business Park. Should be brought forward in short term if possible to enable further employment growth in this node. This site would help to deliver site 241.	Yes, as a priority
385	Border Hardcore & Rockery Stone Co Ltd	Employment Land to include potential waste and renewable energy	16.39	Employment, Waste, Renewable Energy	Buttington Quarry site, which has an employment allocation already for part of site (6 ha). A site of about 6 ha appears appropriate for B-class employment for this site (likely to be staged), though PCC would need more certainty from the landholder as to its deliverability.	Yes
414	Land West of Brynygroes, Ystradgynlais	Employment Development comprising an indicative total of 17 commercial plots, set off existing haul road and newly reformed road junction,	0.75	Employment	Site to the west of A4067, it is sloped and partially tree-covered. Would need to demonstrate need for type of employment uses, given existing	Perhaps, need to demonstrate market

Candidate Site Ref.	Site Name	Site Description	Size for Employment (ha)	Proposed Uses	Market Comments	Should the site be further considered for employment?
		constructed under Planning Permission 20/1314			employment uses in Ystradgynlais appear to be underperforming.	demand and uses.
426	Land south / adj Brynberth Ind Estate, Rhayader	Erection of up to 8,000 sqm industrial/commercial floorspace (B1,B2,B8) and ancillary uses with associated infrastructure.	1.59	Employment	Employment allocation brought forward again. Suitable for employment uses as extension of existing node, though questionable demand.	Yes
Mixed-use Sites						
123	Coed Tylissa	B1, B2, C3 - Open to any residential or employment uses.	0.56	Open Market Housing, Affordable Housing, Employment	Low profile site. broader development likely to be residential-led, with any employment to serve micro-businesses. However, very questionable demand in this small area, away from key arterials.	Unlikely
124	Coed Tylissa (All)	Residential and Employment uses considered	1.3	Open Market Housing, Affordable Housing, Employment	Low profile site. broader development likely to be residential-led, with any employment to serve micro-businesses. However, very questionable demand in this small area, away from key arterials.	Unlikely
168	Site adjacent NPTC Newtown Campus, Llanidloes Road Newtown Powys SY16 4HU	Commercial/ industrial/ hotel	5.7	Employment, Health, Education and Social Care	Existing employment allocation, though likely to be developed for broader uses than just B-class employment. PCC should look to encourage B-class employment uses that improve/ enhance links with the college and R&D.	Yes
183	Land adjacent to Kerry Roundabout and Treowen, Newtown	Residential to northern parcel and commercial/ industrial/ retail/ tourism to southern parcel. The northern parcel is sloping so assume 60% developable.	8.5	Open Market Housing, Affordable Housing, Employment, Tourism, Green Infrastructure / Open Space, Retail, Renewable Energy, Biodiversity	Location at the Kerry Rd roundabout and the Newtown bypass provides an opportunity for a gateway site for Newtown, with potential to attract	Yes

Candidate Site Ref.	Site Name	Site Description	Size for Employment (ha)	Proposed Uses	Market Comments	Should the site be further considered for employment?
		Note space below does not allow for petrol filling station 500m2.			significant occupiers. Close to existing employment node, though some separation. Some sloping would reduce yield	
239	Land adj. Brecon Pharmaceuticals, Hay on Wye	The site proposes to include 2.4ha of employment land and 1.8ha of housing (49 dwellings), inclusive of open space.	4.21	Open Market Housing, Affordable Housing, Specialist Housing (including for older people and those with disabilities), Employment, Retail	Pharmaceutical site is a key employer in Powys. Opportunity to enhance Hay's role for employment should be pursued, though risk that site would be fully developed for residential. PCC should liaise with landholder to encourage maximum use of site for employment.	Yes
268	Llandrinio Grange Farm, Arddleen	The site is proposed as a mixed use development of open market housing and employment allocation	10.39	Open Market Housing, Employment	Site coming forward would be dependent on housing. If brought forward, should encourage small scale units with access to the A-road.	Perhaps, though dependent on residential / /mixed use considerations.
303	Bronllys Hall, Bronllys, Brecon, Powys. LD3 0LD.	Mixed-use site comprises a broad vary of existing buildings all of which are not listed. The parkland setting in which are buildings are located is regarded as a Registered Historic Garden and Park. The submission of this Candidate Site is to consider a	3.8	Open Market Housing, Affordable Housing, Employment, Green Infrastructure / Open Space, Health, Education and Social Care	Not being promoted for B-class employment	No
369	Land south of the A4811 & East of the A489, Newtown, Powys	Commercial development comprising of a mix of uses - potential mix includes petrol filling station (sui generis), restaurant with drive-thru facility (A3), hotel (C1) and public house (A3).	1.32	Employment, Tourism, Retail	Not being promoted for B-class employment	No
390	Land at Hill View	Mixed residential and commercial use	4.64	Open Market Housing, Employment	Would need to address access and congestion issues. Relatively low-profile site at Four Crosses, near to existing employment areas, though access likely to be from north, therefore functionally separate.	No

Candidate Site Ref.	Site Name	Site Description	Size for Employment (ha)	Proposed Uses	Market Comments	Should the site be further considered for employment?
					Likely to be only limited demand for units.	
419	Global Centre of Rail Excellence	A mixed-use site allocation to support development associated with the operation of the Global Centre of Rail Excellence (GCRE), within Powys County Council's jurisdiction. Specifically, this allocation seeks to establish the principle of the site allocation	599.27	Employment, Renewable Energy, Transport Infrastructure, Other	Very large site to be safeguarded for the GCRE	Yes, in line with GCRE developments
195	Land adjacent to Mochdre Industrial Estate, Newtown, Powys. SY16 4LE.	Mixed comprising commercial on land parcels 1 and 2, tourism (log cabins, pods, etc) or residential on parcel 3. Land parcel 3 is heavily wooded and the expectation is that the majority of trees will be retained with development within.	19.93	Open Market Housing, Affordable Housing, Employment, Tourism, Green Infrastructure / Open Space, Biodiversity	Site not appropriate for B-class employment, though potential for some commercial uses as part of tourism offer. Sloping and wooded site provide significant constraints.	No
308	Land Adjacent to Dolwgwenith and Tan Y Bryn, Bryn Du Road, Llanidloes, Powys. SY18 6YR.	Residential to area as defined by planning approval P/2017/0423 (4.1ha) with the remainder of the site fronting the bypass to be employment/ retail (1.06ha).	5.16	Open Market Housing, Affordable Housing, Employment, Green Infrastructure / Open Space	Land fronting A-road appropriate for a mix of commercial uses, though more likely to be A2/A3 or some trade counter uses than B-class employment. Potential for some clean workshops.	Yes, in line with approval.

Sources: Candidate site promoters, Powys CC, BE Group assessment, 2024

6.18 The candidate sites provide opportunities for further employment uses as appropriate to meet demand over the coming planning period. The following sites are considered appropriate for further consideration, given they have market attractiveness/opportunities for the Powys employment market. This provides a potential further 98ha (excluding the GCRE site) that could come forward for employment, though note that this is likely to be further reduced when net development yields of the sites are refined and further sifting of the sites based on other factors (e.g. sloping, ecology, etc.) are taken into account.

Table 29 – Candidate Sites to be Further Considered

Candidate Site Ref.	Site Name	Size for Employment (ha)	Should the site be further considered for employment?
184	Land adjacent to Kerry Roundabout, Newtown	18.4	Yes
241	Charlies Stores, Buttington	3.75	Yes, if northern site is also allocated.
299	Land to the north of Parc Hafren Industrial Estate, Llanidloes, SY18 6RB	4.53	Yes
304	Land adjoining Black Mountain Business Park, Three Cocks	5.16	Yes
317	Land at Four Crosses	1.2	Yes
354	Land West of Montgomeryshire Natural Spring Water Co Church Stoke	3.3	Yes
355	Land South of Montgomery Natural Spring Water, Church Stoke, Powys, SY15 6AR	3.7	Yes
366	North Field adjacent to Offa's Dyke Business Park	5.38	Yes, as a priority
385	Border Hardcore & Rockery Stone Co Ltd	16.39	Yes
414	Land West of Brynygroes, Ystradgynlais	0.75	Consider. Need to demonstrate market demand and uses.
426	Land south / adj Brynberth Ind Estate, Rhayader	1.59	Yes
Mixed-use Sites			
168	Site adjacent NPTC Newtown Campus, Llanidloes Road Newtown Powys SY16 4HU	5.7	Yes
183	Land adjacent to Kerry Roundabout and Treowen, Newtown	8.5	Yes
239	Land adj. Brecon Pharmaceuticals, Hay on Wye	4.21	Yes
419	Global Centre of Rail Excellence	599.27	Yes, in line with GCRE
308	Land Adjacent to Dolwgwenith and Tan Y Bryn, Bryn Du Road, Llanidloes, Powys. SY18 6YR.	5.16	Yes, in line with approval.
268	Llandrinio Grange Farm, Arddleen	10.39	Consider. Dependent on residential /mixed use considerations
Total (excluding GCRE)		**98.11**	

Sources: Candidate site promoters, Powys CC, BE Group assessment, 2024

7.0 EMPLOYMENT LAND FORECASTS

Introduction

7.1 The Welsh Planning Practice Guidance Note ‘Building an Economic Development Evidence Base to Support a Local Development Plan’ states that the assessment of future land needs should be determined by looking at both past trends and future forecasting methods, and highlights that these should include historic land take-up and future employment and population change. Neither approach provides a definitive answer, but they do provide an indication of growth patterns and directions. Trends and forecasts must also reflect market signals and they are considered in the context of the market overview undertaken as part of this study.

7.2 The two models are:

- <u>Practice Guidance Method 1: Past Building Completions</u>
  This reviews the actual take-up of employment land and premises in the County Borough over time. The method is not wholly reliable as there will be peaks and troughs and different time periods taken can also result in different outcomes. For example, a period of sustained growth may show a high average take-up, whereas looking over a recessionary period could well reflect low or even nil take-up. Furthermore, it relies on the veracity and extent of data collected over time.
- <u>Practice Guidance Method 2: Labour Demand Forecasting</u>
  This relies on the econometric forecasts which use a model that projects the likely jobs growth in different industry sectors. The jobs figures are then translated to land using a formula based on jobs to floorspace density, which in turn can be translated into the projected land need. This method uses **Oxford Economics forecasts**, which account for the most recent national and regional socio-economic and political changes and which could be seen as a baseline trajectory of employment. We have reviewed all sectors (growing and declining sectors) to assess changes in employment land and premises needs as well as growth sectors only.

  Employment forecasts and the resulting estimations of employment premises and land have several limitations. The forecasts are based on national and regional trends with some local adjustments for some industry sectors, which means, at a local level economic activity is not always accurately represented.

For example, any differences in the economic performance in recent years between Powys and the national averages, may not be adequately picked up within the forecasts. Also, merely translating jobs to land needs will not always reflect local property trends.

The econometric forecasts are useful in that they analyse each industry sector and, in conjunction with other market data, the forecasts can identify where sectors may be growing, or shrinking which in turn can inform land and property needs.

7.3 The Practice Guidance allows for alternative scenarios to be developed, where future growth rates are considered to be higher or lower than past trends. In Powys, it has been observed that land supply has constrained growth and thus there is an argument for adjusting the forecasts to reflect this past constraint.

7.4 This chapter also considers the labour supply (resident workforce) changes over the forecast period and their implications for employment land need. This is as an alternative forecasting method for context and to inform housing planning considerations.

7.5 The forecast period for the ELR is 2022-2037.

Practice Guidance Method One: Trends

7.6 Powys County Council collects and publishes data on employment land through its Annual Monitoring Reports, including annual data since adoption of the LDP in 2018. Data is published in the form of planning permissions. Further data is available from 2012 on planning permissions, as analysed in the Mid Wales Employment Sites Premises Needs assessment (Stage 1).

7.7 The Annual Monitoring Reports publish data on planning permissions, rather than building completions. This has limitations for this method, given not all permissions will come forward for completions. However, given the availability of the data, this provides an adequate proxy for this method.

Table 30 – Employment Land and Premises

	Allocated Land	
Monitoring Period	**Permitted Employment Land (ha)**	**Floorspace (sqm)**
2011/12 – 2017/18	Average 1.3 ha/yr	N/A
2018/19	4.297	B1/B2/B8 13,351 sqm
2019/20	0	0
2020/21	1.809	B1/B2/B8 5,048 sqm
2021/22	0.745	B2/B8 2,429 sqm
2022/23	2.761	B1/B2/B8 3,900 sqm
Total	**18.712**	**24,728**
Average	**1.6**	

Sources: Annual Monitoring Reports; Mid Wales Employment Sites Premises Needs Assessment (Stage 1)

7.8 Employment land and premises demand can be forecasted based on the assumption that the past trends would continue over the forecast period. Therefore, underlying this approach is that the future growth in Powys will be in line with past growth. If there are significant structural changes to the economy over the forecast period, this may not be the case, but provides a baseline indication of potential growth. The past decade has seen significant volatility in the market, which makes forecasting difficult. It has been observed more broadly in the economy that there has been a reduction in business confidence, which can flow through to investment choices in premises and development.

7.9 Importantly, for Powys there have been noticeable constraints in supply of employment land in the County, particularly in key markets such as Newtown and Welshpool. Therefore, it is reasonable to assume that had more employment land been available to the market, that past trends would have been higher than actually recorded. Therefore, adopting past rates for planning for employment land over the coming planning period may underestimate actual requirements in a less constrained market. As such, the application of this method below has assumed two scenarios, firstly based on the past average and secondly on a 25 percent uplift in the past average.

Table 31 – Employment Land Requirement based on Past Trends

Approach	2022-2037 Annual Average Employment Land (ha/yr)	2022-2037 Requirement (ha)	Buffer (=5 years' growth)	2022-2037 Total Requirement (ha)
Baseline Trend	1.6	24.0	8.0	32.0
Baseline Trend + 25% uplift to account for constrained market	2.0	30.0	10.0	40.0

Source: BE Group, 2024

7.10 The table above includes a buffer in the forecasts to allow for choice of sites and flexibility in the market. The buffer included in the calculations is equivalent to five years of take-up of employment land to provide a choice of sites by size, quality and location and to help ensure a continuum of supply beyond the end of the 2037 period. This also makes some allowance for the loss of employment land to non B-Class uses over the period.

7.11 This is broadly consistent with the recommended employment land forecast for Powys LPA area presented within the Mid Wales Region Employment Sites and Premises Needs and Action Plan documents (see review in Chapter 2.0), which forecast a requirement of 33.8 ha between 2019 and 2040.

Practice Guidance Method Two: Labour Demand Forecasting

7.12 This method is based on the Oxford Economics forecasts for Powys to 2037. These forecasts are econometric models based on available data at the time, including demographic, economic and population data. They break down national trends to local levels and thus are more limited in forecasting small areas that might have different economic and socio-economic characteristics to the national averages.

7.13 The forecasts have been purchased for the Powys local authority area only and exclude the area of BBNP. As such, they have an extra layer of calculation (and thus uncertainty) in the disaggregation of the national data to a local level.

7.14 The forecasts break down employment to the level of 19 industry sectors. Employment in some of these sectors is likely to be fully (or nearly all) within B-class employment workspaces, such as manufacturing, professional services and administration. Conversely, some sectors are all or almost all out of B-class land, such as agriculture, mining and accommodation and food services. However, many sectors are mixed, with a component of their employment likely to be in B-class employment workspaces, but also located within other spaces. For example, transport and storage would include employment on B8 warehousing land, but employment would also include self-employed hauliers and drivers that would not be based at a particular B-class site. Therefore, for each sector, an estimate has been made on the proportion of employment that is likely to be located within B-class employment spaces (and thus infer a demand for employment land). These estimates have been based on BE Group’s experience with other areas across Wales and England and have been accepted in Examinations in Public.

7.15 The following table is a summary of the Oxford Economics forecasts by five-year interval. It is noted that between 2022 and 2037, the forecast change in total employment is only 436 jobs (growth of 0.8 percent). However, the growth trajectory is not linear, with an anticipated peak in about 2029 of some 54,815 jobs, which is an increase of 1,600 over the 2022 figure. Therefore, the forecasts project a relatively rapid growth in employment in the near-term, followed by a gradual decline.

Table 32: Employment Forecast by Broad Sector

Sector	2022	2027	2032	2037	Change 2022-2037	Percent Change
Agriculture, forestry and fishing	7,651	7,886	7,768	7,561	-90	-1.2%
Mining and quarrying	194	175	145	116	-78	-40.2%
Manufacturing	6,760	6,336	5,685	5,062	-1,698	-25.1%
Electricity, gas, steam and air conditioning supply	55	53	51	48	-7	-12.7%
Water supply, sewerage, waste management and remediation activities	309	312	306	298	-11	-3.6%
Construction	2,932	2,983	3,032	3,041	109	3.7%
Wholesale and retail trade; repair of motor vehicles and motorcycles	7,125	7,419	7,462	7,457	332	4.7%
Transportation and storage	1,577	1,664	1,643	1,628	51	3.2%
Accommodation and food service activities	3,738	4,029	4,093	4,081	343	9.2%
Information and communication	852	921	952	972	120	14.1%
Financial and insurance activities	425	445	446	440	15	3.5%
Real estate activities	379	399	398	392	13	3.4%
Professional, scientific and technical activities	4,847	5,166	5,391	5,478	631	13.0%
Administrative and support service activities	2,141	2,242	2,362	2,425	284	13.3%
Public administration and defence; compulsory social security	2,743	2,690	2,581	2,432	-311	-11.3%
Education	3,029	3,022	2,994	2,921	-108	-3.6%
Human health and social work activities	5,286	5,508	5,691	5,762	476	9.0%
Arts, entertainment and recreation	2,034	2,161	2,262	2,319	285	14.0%
Other service activities	1,101	1,169	1,187	1,182	81	7.4%
Total	**53,179**	**54,578**	**54,449**	**53,615**	**436**	**0.8%**

Source: Oxford Economics, 2023

7.16 For the particular sectors, Oxford Economics projects the largest growth sectors to be professional, scientific and technical activities (+630 jobs), human health and social work (+480 jobs) and accommodation and food service (+340 jobs). While the professional and scientific activities are likely to be within B1 units, the majority of human health and accommodation and food services take place on non-B-class sites.

7.17 Some sectors are forecast to decline, most notably manufacturing (-1,700 jobs). This will have a substantial impact on forecast employment land and premises demand based on these forecasts, as manufacturing is a key B-class employment user and a negative change in employment infers a negative demand for land and premises (although this may not be the case in practise).

7.18 The Oxford Economics data also includes forecasts on GVA growth by sector over the forecast period. GVA (in constant 2019 £ values) is forecast to increase across all sectors apart from mining and quarrying, which is a small sector. Therefore, even though seven of the 19 sectors are forecast to decline in employment over the forecast period (and a further two with very modest growth), only one is forecast to have a decline in GVA in this period.

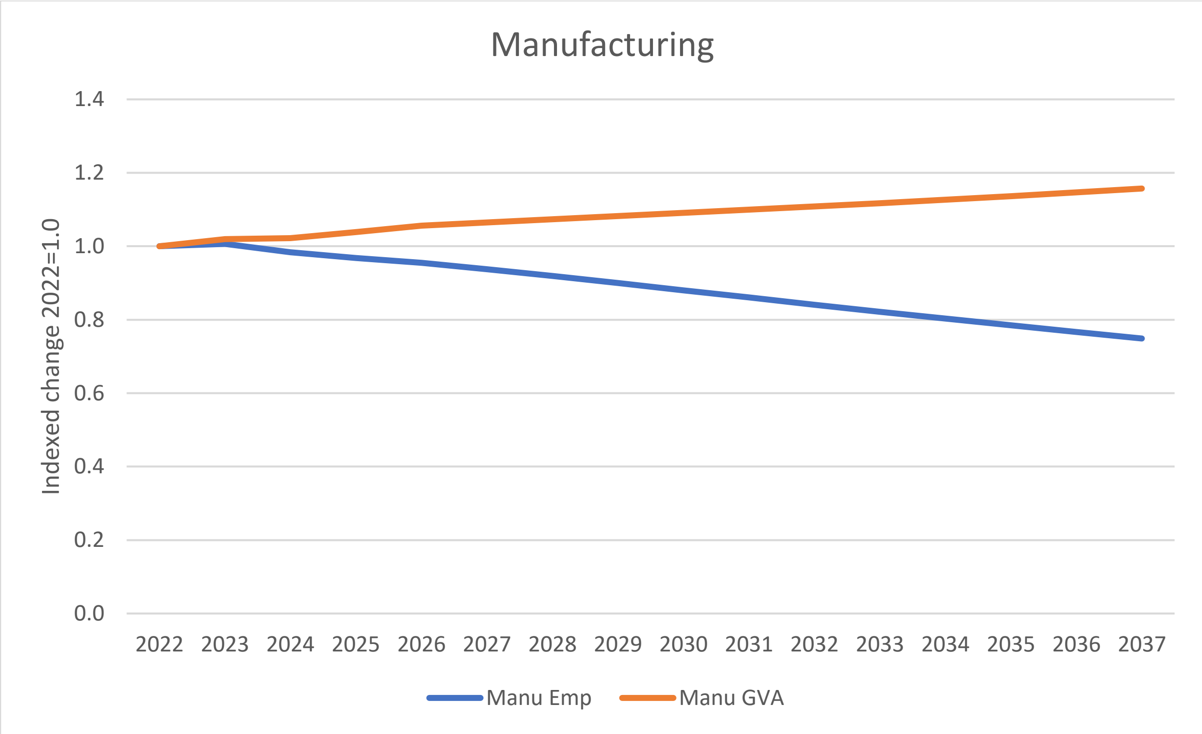
Table 33: GVA Change by Broad Sector (£M – 2019)

Sector	2022	2027	2032	2037	Change 2022-2037	Percent Change
Agriculture, forestry and fishing	140.0	151.0	159.0	167.0	27	19.3%
Mining and quarrying	6.6	5.2	4.5	3.9	-3	-40.6%
Manufacturing	270.6	288.3	299.9	313.2	43	15.7%
Electricity, gas, steam and air conditioning supply	14.5	16.2	18.1	20.3	6	40.0%
Water supply, sewerage, waste management and remediation activities	36.5	39.0	39.8	40.5	4	10.9%
Construction	91.1	97.6	99.9	101.9	11	11.9%
Wholesale and retail trade; repair of motor vehicles and motorcycles	151.0	163.8	174.3	184.3	33	22.1%
Transportation and storage	52.4	56.3	59.5	62.6	10	19.5%
Accommodation and food service activities	63.5	69.3	73.1	76.7	13	20.8%
Information and communication	35.0	40.5	46.9	54.1	19	54.8%
Financial and insurance activities	14.7	15.6	16.8	17.8	3	20.9%
Real estate activities	305.9	322.6	346.5	367.7	62	20.2%
Professional, scientific and technical activities	67.9	72.1	77.1	81.8	14	20.5%
Administrative and support service activities	105.1	117.2	127.3	138.0	33	31.3%
Public administration and defence; compulsory social security	156.7	158.5	161.8	164.7	8	5.1%
Education	111.2	112.3	113.7	114.7	4	3.2%
Human health and social work activities	225.3	232.2	245.0	255.8	31	13.5%
Arts, entertainment and recreation	16.7	18.5	19.5	20.4	4	22.1%
Other service activities	18.5	19.9	20.9	21.6	3	17.0%
Total	**1883.1**	**1996.0**	**2103.6**	**2207.0**	**324**	**17.2%**

Source: Oxford Economics, 2023

7.19 It is particularly pertinent to look at the manufacturing sector trends in GVA, compared to forecast employment changes. While employment is forecast to see substantial declines over the forecast period (-1,700 jobs, -25.1%), GVA is forecast to grow by £43M (15.7%). Indeed, manufacturing is forecast to experience the second highest GVA growth in Powys in this period, with only real estate activities forecast to see higher GVA growth. The comparison between GVA and jobs change in the manufacturing sector is illustrated in the following graph (both indexed to 1.0 at 2022).

Figure 11 – Manufacturing Employment and GVA Change (2022-37)



Source: Oxford Economics, 2023

7.20 Therefore, while the manufacturing sector is forecast to decline in employment, this does not infer that there would be a commensurate decline in output within the sector; rather the GVA forecast is for a growing manufacturing sector in Powys. This has implications for employment land requirements, as discussed later in the chapter.

7.21 The following table provides the forecasted change in employment floorspace demand generated by the changes in employment numbers from Oxford Economics. This analysis has reflected Welsh Practice Guidance and includes the following:

- Identify which industry sectors are likely to take up employment land, including the proportion of that sector's employment on B-class employment land (Table 34).
- Adopt appropriate employment densities to convert employment numbers to floorspace demand (see Table 35).

- Adopt a plot ratio to convert floorspace to employment land demand (see Table 35).

Table 34 – Labour Demand Forecast, 2022-2037

Broad Sector Groupings	Jobs, Split by Sector 2022-2037	Land Use	Weighting	Jobs, Split by Sector 2022-2037	*Jobs, by use, which Do Not Require B-Class Premises.* 2022-2037
Non B-Class Uses					
Agriculture, Forestry and Fishing	-90	Non B	-	-	*-90*
Mining and Quarrying	-78	Non B	-	-	*-78*
Accommodation and food service activities	342	Non B	-	-	*342*
Arts, entertainment and recreation	285	Non B	-	-	*285*
Total	**460**			**-**	***460***
B1 Mostly Office Uses					
Administrative and support service activities	284	B1	1	284	-
Information and Communication	120	B1	1	120	-
Professional, scientific and technical activities	631	B1	1	631	-
Real estate activities	13	B1	1	13	-
Financial and Insurance Activities	14	B1	1	14	-
Public administration and defence; compulsory social security	-311	B1	0.22	-68	*-243*
Human health and social work activities	477	B1	0.22	105	*372*
Education	-108	B1	0.22	-24	*-84*
Other service activities	81	B1	0.22	18	*63*
Total	**1,201**	**-**	**-**	**1,092**	***108***
B2/B8 Uses					
Manufacturing	-1,698	B2	1	-1,698	-
Utilities	-18	B2	0.26	-5	*-14*
Construction	110	B2	0.26	29	*81*
Transportation and storage	51	B8	0.48	24	*26*
Wholesale and retail trade; repair of motor vehicles and motorcycles	332	B8	0.1	33	*299*
Total	**-1,224**	**-**	**-**	**-1,617**	***393***

Source: BE Group analysis of Oxford Economics forecasts, 2023

7.22 The above table's analysis has found that there will be some 1,090 additional jobs in B1 office space in Powys in 2037, over 2022 levels. The analysis also has found that there will be some 1,620 fewer jobs in B2/B8 spaces in Powys by 2037, compared to 2022 levels.

7.23 Table 35 takes the total net jobs figures for B1 and B2/B8 uses identified above and converts them first into floorspace (sqm) by the rates per worker shown. These worker densities are presented as a range, representing potential different outcomes of workspaces in Powys. For offices, higher densities (i.e. less floorspace per worker) would be in call centre or city centre locations, with lower densities in locations where floorspace is not at a premium price or in workplaces that require some lower intensity spaces. Therefore, for Powys a mid- or low-density level is more likely, given its economic function. For industrial and warehousing the higher density workspaces will be manufacturing and lower densities will be for warehousing uses. The table then converts that floorspace into land (hectares) at 40 percent or 4,000 sqm/hectare coverage, i.e. dividing the floorspace by 4,000 sqm.

Table 35 – Floorspace and Land Requirement Forecasts

Offices (B1)	**Based on 1,090 additional workers, sqm**	**Plot Ratio at 40 percent Coverage, ha**
12 (sqm/job)	13,104	3.28
16 (sqm/job)	17,472	4.37
20 (sqm/job)	21,840	5.46
Industrial (B2/B8)	**Based on 1,620 fewer workers, sqm**	**Plot Ratio at 40 percent Coverage, ha**
50 (sqm/job)	-80,850	-20.21
67 (sqm/job)	-108,339	-27.08
85 (sqm/job)	-137,445	-34.36

Source: BE Group analysis, 2024

7.24 The projections for employment floorspace in Powys, based on the Oxford Economics forecasts, show that there is a positive demand for office floorspace, led by growth in the professional, scientific and technical activities sector. However, this is more than offset by a large negative demand for industrial and warehousing floorspace, driven by the decline in manufacturing employment.

7.25 It is important to note that this methodology assumes that there would be a constant density of workers per floorspace. This may not be the case over the forecast period as changes in operation (e.g. automation, efficiency improvements) may mean that the worker levels change but that the overall floorspace needs of an operation may not.

7.26 In declining employment sectors, such as manufacturing, it may not be the case that there will be a commensurate decline in floorspace requirements. The comparison of GVA and employment change outlined above corroborates this, where the manufacturing sector is forecast to increase in terms of output during a period of declining employment. It is also noted that industrial premises have seen more activity in property transaction levels over the last decade and the planning permissions have include a range of industrial schemes, which indicate that the local evidence for the Powys industrial market is more healthy than inferred by the employment forecasts.

7.27 For the office-based sectors, this approach assumes that all workers would be located in B1 office space. With changing workplace patterns precipitated by the pandemic but that will remain in place to an extent as Welsh Government policies support homeworking, not all of these workers are likely to be in B1 office space, with an increasing proportion working from home (partly or fully). Therefore, the employment land forecast for office-based sectors based on this method might be considered an upper level.

7.28 For each use, offices (B1) and industrial (B2/B8), three employment density levels (the amount of floorspace required for each job) are considered. Comments on these density options are provided:

Offices

- 12 sqm per worker – Would be applicable to a quite high-density service sector operation such as a call centre or city centre offices. This is considered too dense for Powys as a whole, though some individual premises may be at such levels.
- 16 sqm per worker – Mid-level density level, this is identified in Welsh Practice Guidance (para 6.5.1, page 39) as an average floorspace/worker rate for office uses in Wales. It reflects a mix of town centre and business park density levels.
- 20 sqm per worker – A comparably low employment density, reflective of more specialist facilities such as design studios, co-working and maker spaces.

Industrial

- 50 sqm per worker – This high density relates to B1 light industrial uses, which are evident throughout Powys, particularly in smaller settlements. However, it is not an appropriate level for mid to larger premises.
- 67 sqm per worker – Mid-level density level, this is identified in Welsh Practice Guidance (para 6.5.1, page 39) as an average floorspace/worker rate for industrial/warehouse uses in Wales. Allows for a mix of high-density light industrial and mid-density B2/B8 uses.

- 85 sqm per worker – This low-density level would be most applicable to the largest B8 logistics facilities, National and Regional Distribution Centres. While some individual premises may be operating a lower densities (including those with plant storage facilities), overall this is considered too low for Powys.

7.29 This analysis has adopted the mid-level densities for both offices and industrial as an average across the County.

7.30 Based on the above, the recommended land needs between 2022 and 2037 for Powys based on Method Two are:

- B1 Offices – 1,090 additional jobs at 16 sqm per worker and a 40 percent plot ratio = **4.4 ha**
- B2/B8 Industrial – 1,620 less jobs at 67 sqm per worker and a 40 percent plot ratio = **-27.1 ha**
- Total net need = **-22.7 ha**

7.31 Therefore, by assessing employment land using this approach, there is a significant negative requirement for employment land across Powys over the forecast period to 2037. While there is a positive requirement for office space, this is more than counteracted by the large calculated negative requirement for industrial space, primarily due to the forecast reduction in the manufacturing workforce of 1,700 between 2022 and 2037. However, as discussed earlier, a reduction in manufacturing jobs may not result in a commensurate reduction in demand for employment floorspace. This is because the reduction in employment may not be related to reducing output or demand; rather it may be due to increasing efficiencies or improved automation. Furthermore, if a business reduces employment, they may not immediately release the commensurate level of floorspace, either retaining it for stock/plant or for longer-term needs. As seen in property analysis chapter, the interest in industrial properties is robust. Therefore, it cannot be assumed that there will be reduced manufacturing floorspace and land that could be released for other employment uses or non-B-class uses.

7.32 Therefore, it is prudent to look at just the growth employment sectors to identify the scale of additional floorspace and land required to support the growing areas of the economy.

7.33 If just looking at growth sectors, Powys would have the following requirements.

- B1 Offices – 1,180 additional jobs at 16 sqm per worker and a 40 percent plot ratio = **4.7 ha**
- B2/B8 Industrial – 86 extra jobs at 67 sqm per worker and a 40 percent plot ratio = **1.4 ha**
- Total growth sector need = **6.1 ha.**

Labour Supply Method

7.34 The Oxford Economics forecasts also include forecasts for the resident employment within Powys (number of working residents in Powys). The resident employment is forecast to increase from 50,550 jobs to 51,190 jobs between 2022 and 2037. While this resident employment is not broken down by sector in the forecasts, if it is assumed that the sectoral breakdown is analogous to the working population, we can infer a potential employment land requirement based on this resident employment in the same manner as the Labour Supply Method.

7.35 The following table provides forecasts by sector of the residential employment, from BE Group's breakdown of total Oxford Economics figures.

Table 36: Resident Employment Forecast by Broad Sector

Sector	2022	2027	2032	2037	Change 2022-2037	Percent Change
Agriculture, forestry and fishing	7,272	7,470	7,391	7,218	-54	-0.7%
Mining and quarrying	184	166	138	111	-73	-39.7%
Manufacturing	6,425	6,002	5,409	4,832	-1,593	-24.8%
Electricity, gas, steam and air conditioning supply	53	51	48	46	-7	-13.2%
Water supply, sewerage, waste management and remediation activities	294	296	291	284	-10	-3.4%
Construction	2,787	2,825	2,884	2,904	117	4.2%
Wholesale and retail trade; repair of motor vehicles and motorcycles	6,772	7,027	7,100	7,119	347	5.1%
Transportation and storage	1,499	1,576	1,564	1,554	55	3.7%
Accommodation and food service activities	3,553	3,816	3,894	3,896	343	9.7%
Information and communication	810	872	906	928	118	14.6%
Financial and insurance activities	404	421	424	420	16	4.0%
Real estate activities	361	378	378	374	13	3.6%
Professional, scientific and technical activities	4,607	4,893	5,130	5,229	622	13.5%
Administrative and support service activities	2,035	2,123	2,248	2,315	280	13.8%
Public administration and defence; compulsory social security	2,608	2,548	2,456	2,322	-286	-11.0%
Education	2,879	2,863	2,849	2,789	-90	-3.1%
Human health and social work activities	5,024	5,217	5,415	5,501	477	9.5%
Arts, entertainment and recreation	1,933	2,047	2,152	2,214	281	14.5%
Other service activities	1,046	1,107	1,129	1,129	83	7.9%
Total	**50,549**	**51,700**	**51,806**	**51,185**	**636**	**1.3%**

Source: BE Group analysis of Oxford Economics data, 2023

7.36 Using these forecasts with the same approach as for Method Two, the forecast employment land for Powys based on the resident workforce growth would be:

Table 37 – Labour Supply – Floorspace and Land Requirement Forecasts

Offices (B1)	Based on 1,090 additional workers, sqm	Plot Ratio at 40 percent Coverage, ha
12 (sqm/job)	13,068	3.27
16 (sqm/job)	17,424	4.36
20 (sqm/job)	21,780	5.45
Industrial (B2/B8)	**Based on 1,510 fewer workers, sqm**	**Plot Ratio at 40 percent Coverage, ha**
50 (sqm/job)	-75,300	-18.83
67 (sqm/job)	-100,902	-25.23
85 (sqm/job)	-128,010	-32.00

Source: BE Group analysis, 2024

7.37 The office-based demand is essentially the same as for the Labour Supply model and the industrial demand is a slightly smaller negative figure. Based on mid-level densities, the recommended land needs between 2022 and 2037 for Powys based on Labour Supply are:

- B1 Offices – 1,090 additional jobs at 16 sqm per worker and a 40 percent plot ratio = **4.4 ha**
- B2/B8 Industrial – 1,510 less jobs at 67 sqm per worker and a 40 percent plot ratio = **-25.3 ha**
- Total net need = **-20.9 ha**

7.38 Using only growth sectors, this equates to:

- B1 Offices – 1,170 additional jobs at 16 sqm per worker and a 40 percent plot ratio = **4.7 ha**
- B2/B8 Industrial – 90 extra jobs at 67 sqm per worker and a 40 percent plot ratio = **1.5 ha**
- Total growth sector need = **6.2 ha.**

7.39 These levels are very similar to the Labour Demand method forecasts.

Comparing Methods

7.40 No forecasting method is perfect and appropriate to account for every scenario. Therefore, it is prudent to review the results of the forecasts and their appropriateness for Powys and the application in the RLDP.

7.41 The Method One approach is a simple extrapolation exercise of past growth rates over the forecast period. As outlined early in this chapter, it is reliant on the veracity of the data available and with planning permissions being the basis of the data gathered, there is some uncertainty in this approach. Furthermore, in a constrained market the past trends on employment land may be underrepresenting the true potential of the employment growth, therefore the adjusted level with an uplift in the level adopted going forward is more likely to better reflect an unconstrained market than the baseline approach.

7.42 The Method Two approach, looking at employment growth projections for the area, has resulted in a significantly lower forecast than the Method One results, particularly if looking at all sectors, rather than just growth sectors. It is recommended that the growth only approach is a more appropriate forecast than the net approach as it is not skewed by the significant negative manufacturing employment change.

7.43 However, even with the growth only approach, there is not a means to capture the manufacturing needs in the local market, which given current and recent transaction activity is of relevance to the market.

7.44 This limitation is also apparent for the Labour Supply approach, which is provided for comparison but is not generally considered one of the core approaches for employment land demand assessment.

7.45 The following table summarises the forecasts, including a comparison to the existing, realistic supply of employment land in Powys. This includes an allowance of a buffer equivalent to five-years of growth for each of the scenario options. This is to enable choice in the market and fluctuations in growth.

Table 38 – Land Forecast Models – Summary

Model	Land Supply, ha*	Land Need 2022-2037, ha	Flexibility Buffer (five years take-up rate) ha	Land Need Incl. flexibility buffer	Surplus/ Deficit, ha
Practice Guidance Method One: Past take up (@1.6 ha/yr)	23.52	B1 Office: 3.0 B2/B8: 21.0 Total: 24.0	B1 Office: 1.0 B2/B8: 7.0 Total: 8.0	B1 Office: 4.0 B2/B8: 28.0 Total: 32.0	-8.48
Practice Guidance Method One: Past take up + Additional allowance for constrained supply (@2.0 ha/yr)	23.52	B1 Office: 3.8 B2/B8: 26.2 Total: 30.0	B1 Office: 1.3 B2/B8: 8.7 Total: 10.0	B1 Office: 5.1 B2/B8: 34.9 Total: 40.0	-16.48
Practice Guidance Method Two: Labour Demand Forecasting	23.52	Net Change B1: 4.4 B2/B8: -27.1 Total: -22.7 Growth Only B1: 4.7 B2/B8: 1.4 Total: 6.1	Net Change B1: 1.5 B2/B8: - Total: 1.5 Growth Only B1: 1.6 B2/B8: 0.5 Total: 2.1	Net Change B1: 5.9 B2/B8: -27.1 Total: -21.2 Growth Only B1: 6.3 B2/B8: 1.9 Total: 8.2	Net Change 44.72 Growth Only 15.32
Labour Supply Forecasting	23.52	Net Change B1: 4.4 B2/B8: -25.3 Total: -20.9 Growth Only B1: 4.7 B2/B8: 1.5 Total: 6.2	Net Change B1: 1.5 B2/B8: - Total: 1.5 Growth Only B1: 1.6 B2/B8: 0.5 Total: 2.1	Net Change B1: 5.9 B2/B8: -25.3 Total: -19.4 Growth Only B1: 6.3 B2/B8: 2.0 Total: 8.3	Net Change 42.92 Growth Only 15.22

Source: BE Group's analysis, 2024
**Realistic land supply of allocated sites only, not including candidate sites.*

7.46 Therefore, including buffers, the Method One approach with the uplift to adjust for constraints in the market results in the highest land requirement of **40.0 ha** between 2022 and 2037.

7.47 The Method Two growth only approach results in a forecast requirement of **8.2 ha**. For the reasons discussed above, particularly the relationship with the manufacturing sector, it is considered that this is an underrepresentation of the likely growth and requirement for employment land in Powys.

7.48 **Therefore, the recommended requirement for employment land between 2022 and 2037 in Powys is 40.0 ha, including an allowance for a buffer.** Under this approach, there is expected to be a shortfall of some 32 ha of employment land based on the number of Adopted LDP employment land allocations that are available with planning permission (8.16ha).

8.0 RECOMMENDATIONS

8.1 The following section provides a suite of recommendations to guide employment land provision in Powys to 2037, including guiding policy development for the RLDP.

Recommendation 1: Employment Land Requirement to 2037 is 40.0 ha.

8.2 The employment land forecasting in Chapter 7.0 assessed the requirement from multiple approaches in accordance with Welsh Government guidance – from past trends and using employment forecasts. Furthermore, the past trends approach was modified to account for current and recent constraints in the market. The Method One past trends approach including this adjustment forecasts a requirement of 40.0 ha between 2022 and 2037, including allowance for a buffer to provide flexibility in the market equivalent to five years of growth. It is considered that this approach is the preferred trajectory for Powys.

Recommendation 2: Employment Land Allocations

8.3 This section outlines the recommendations for the employment land allocations in Powys, based on the analysis of the sites in Chapter 6.0.

8.4 The current available and developable land supply is 23.52 ha. This consists of 8.16 ha that is **available with planning permission and 15.36 ha that is** allocated in the Adopted LDP (2011-2026) but does not benefit from planning permission. The supply of land is dispersed throughout the County, with several sites being remaining development plots in existing employment nodes. Whilst some of this land has planning permission, most of the land does not and thus needs to be reconsidered for suitability in order for it to be included within the RLDP.

8.5 The Adopted LDP (2011-2026) employment land allocations are:

Table 39 – Recommendations for Adopted LDP (2011-2026) Employment Sites with Available Employment Land

Site Ref.	Site Name	Type of Employment Site	Net Area (Ha)	Available Land with Planning Permissions	Comments
P58 EA1	Woodland Business Park, Ystradgynlais	B1, B2, B8	1.28	1.28	While there is low demand at present for the remaining parcels, employment uses remain the most appropriate uses for the plots. PCC should liaise with WG about opportunities to bring these sites forward.
P08 EA1/ P08 EC1	Wyeside Enterprise Park, Builth Wells	B2, B8	0.49	0.49	Small site appropriate for SME units. In ownership of WG, which should be encouraged to bring forward to support the local and rural markets.
P28 EA1	Heart of Wales Business Park, Llandrindod Wells	B1, B2, B8	3.23	3.23	Long-term vacant sites within an office park. Unlikely to come forward unless in short term due to viability gap, though as it is within a business park an employment use remains most appropriate. Should consider broader employment options, including hybrid units and serviced offices.
P51 EA1	Broadaxe Business Park, Presteigne	B1, B2, B8	0.23	0.23	Small site that should be able to come forward without intervention.
P52 EA1	Brynberth Business Park, Rhayader	B2, B8	3.7	0	Low term vacant site, though its position within the existing estate means that employment uses remain the most appropriate outcome. Could consider rural economy or outdoor storage options.
P35 EA1	Parc Busnes Derwen Fawr, Llanidloes	B1	0.45	0.45	Likely to progress over the planning period, though take-up to be intermittent. WG could consider specialist food units.
P48 EA1	Llanidloes Road, Newtown	B1, B2, B8	2	0	College to lead on development of this site. Employment uses should be used to promote links with the College, such as R&D uses or advanced technologies centre.
P02 EA1	Abermule Business Park, Abermule	B1, B2, B8	0.52	0.52	Remaining site likely to be developed in short term.
P12 EA1	Church Stoke, Church Stoke	B2, B8	0.64	0.64	Work with landholder to encourage good quality small units for this site. Liaise with water company to understand expansion needs.
P59 EA1	Buttington Quarry, Trewern	B1, B2, B8	6	0	Masterplan required for this site, including programme of rehabilitation/ remediation post-quarrying. PCC to seek assurances from landholder as to developability of site for employment.
P60 EC1	Offa's Dyke Business Park, Welshpool	B1, B2, B8	1.11	1.11	Likely to be built out in short term.
P18 EA1	Four Crosses, Four Crosses	B2, B8	0.21	0.21	Remnant site in employment node. Leave to market.
P42 EA1	Treowain Enterprise Park, Machynlleth	B2, B8	1.26	0	Encourage landholder to bring forward for employment, including highlighting rural economy and sectoral opportunities in area.

Site Ref.	Site Name	Type of Employment Site	Net Area (Ha)	Available Land with Planning Permissions	Comments
P21 MUA1	Gypsy Castle Land, Hay-on-Wye	B2, B8	2.4	0	Likely to be residential led. PCC to ensure that employment also comes forward as part of development, potentially through conditioning approval.
Totals			**23.52**	**8.16**	

Sources: Adopted Local Development Plan, planning applications, BE Group assessment, 2024

8.6 This suite of sites is not sufficient to meet the forecast requirement for employment land to 2037 of 40.0 ha. Taking into consideration the 8.16 ha of available employment land with planning permissions, a further 32 ha needs to allocated for employment uses within the RLDP.

Recommendation 3: Distribution of the Employment Land Requirement

8.7 While it is important to ensure that there is sufficient quantity of employment land within Powys to support business growth, it is also important that this employment land is in the right places to meet market needs. Chapter 4.0 of this report looked at the spatial differences of commercial markets in Powys and defined five Commercial Market Areas within the Powys LPA area. These are listed in the table below, along with the distribution of the committed supply.

8.8 It is recommended that the Powys Replacement LDP directs new allocations to the Commercial Market Areas in accordance with the needs identified in Table 40.

Table 40 – Need Across Commercial Market Areas and Committed Supply

Commercial Market Area	Description of Need	Available land with planning permissions	Recommendation
A483 Spine North	Key economic node for Powys with a broad range of unit size demand. Considerable supply constraints at present, with a need for sites to be developable within a short timeframe.	1.84	Increase land supply
Central Powys	Localised market, with lower churn of employment units, though some long-term occupiers. There are some rural/agricultural sector links, including farming supplies, machinery, etc., especially in Builth Wells. Therefore, sites that can accommodate such uses, including for outdoor storage should be provided.	3.72	Consider distribution and location of any increase in land supply
Rural West	Clear rural economy links, although importantly there are other functions in these nodes, based upon their links to other centres (Machynlleth's link to Ceredigion; Llanidloes' link to Newtown). Sites for small units to be provided.	0.45	Increase land supply
Border Areas	The nature of the employment markets in these areas is dependent on their links to wider markets. Where links are strong (e.g. Three Cocks, Hay-on-Wye) there are some outward facing businesses. However, where towns are more remote (e.g. Knighton, Presteigne) the employment market is more localised, serving the town's residential population and rural areas. Need to ensure sufficient sites in each of the settlements to meet their needs.	0.23	Increase land supply
South of BBNP (Ystradgynlais)	Ystradgynlais has more of a link southwards to Swansea and the Valleys, than it does to other areas in Powys. While having a reasonable quantity of employment unit stock, the quality of stock is generally basic, especially for workshops, and would benefit from better quality industrial workshops being available for this market.	1.28	Increase land supply
Other (Church Stoke)		0.64	Maintain land supply
Total		**8.16**	

Source: BE Group, 2024

8.9 To ensure that the 40ha need for employment land is met (Recommendation 1), the distribution of the additional 32ha of employment land across the Commercial Market Areas to support the Powys economy will need to be addressed through the Replacement LDP, in alignment with the growth and spatial options of the emerging Preferred Strategy.

8.10 The following table lists the Adopted LDP (2011-2026) supply of employment land by commercial market areas to show the distribution of the current level of supply of land.

The table also provides information on the allocations that have an extant permission (committed supply), demonstrating a current interest in bringing the site forward in a timely manner.

Table 41 – Employment Allocation Supply by Commercial Market Area

Commercial Market Area	Sites with Land Supply (highlighted sites have commitments)	Adopted LDP employment land supply	Available land with planning permissions)
A483 Spine North	P48 EA1 – Llanidloes Road, Newtown	2	0
	P02 EA1 – Abermule Business Park, Abermule	0.52	0.52
	P59 EA1 – Buttington Quarry, Trewern	6	0
	P60 EC1 – Offa's Dyke Business Park, Welshpool	1.11	1.11
	P18 EA1 – Four Crosses, Four Crosses	0.21	0.21
	Total	**9.84**	**1.84**
Central Powys	P08 EA1/P08 EC1 – Wyeside Enterprise Park, Builth Wells	0.49	0.49
	P28 EA1 – Heart of Wales Business Park, Llandrindod Wells	3.23	3.23
	P52 EA1 – Brynberth Business Park, Rhayader	3.7	0
	Total	**7.42**	**3.72**
Rural West	P35 EA1 – Parc Busnes Derwen Fawr, Llanidloes	0.45	0.45
	P42 EA1 – Treowain Enterprise Park, Machynlleth	1.26	0
	Total	**1.71**	**0.45**
Border Areas	P51 EA1 – Broadaxe Business Park, Presteigne	0.23	0.23
	P21 MUA1 – Gypsy Castle Land, Hay-on-Wye	2.4	0
	Total	**3.27**	**0.23**
South of BBNP (Ystradgynlais)	P58 EA1 – Woodland Business Park, Ystradgynlais	1.28	**1.28**
	Total	**1.28**	**1.28**
Other	P12 EA1 – Church Stoke, Church Stoke	0.64	0.64
	Total	**0.64**	**0.64**
	Total	**23.52**	**8.16**

Source: BE Group, 2024

8.11 Given the dispersed nature of the settlement pattern and economy in Powys, there is a need to ensure that there is sufficient flexibility in the supply of employment land and premises to enable businesses to have choice in location and move location as appropriate. Therefore, an overallocation of employment land may be appropriate to enable such choice of locations and markets within the County.

Recommendation 4: Existing Employment Sites Protection

8.12 Powys County Council should continue to support and protect existing employment sites, encouraging the primary uses to be B-class employment uses. However, it is recognised that in many employment areas there is an expectation of non-B-class uses to support the core uses, such as retail, sui generis, takeaway outlets, etc. This has occurred throughout the Replacement LDP area. This should only be supported where it is ancillary to and supportive of the core B-class employment uses.

8.13 Chapter 6.0 includes a review of the existing employment sites (safeguarded sites in the Adopted LDP and employment areas developed since) in the County. This review concluded that all existing employment sites can continue to provide an adequate function for Powys and it is not recommended that any of these existing areas should cease to be safeguarded and allowed to develop for other uses.

Recommendation 5: Bring Further Sites forward from list of Candidate Sites

8.14 The review of candidate sites in Chapter 6.0 revealed that several of the sites would be appropriate from a market perspective for employment uses. These sites are listed in the table below. However, it is recognised that other considerations outside of the scope of this analysis, such as ecology, access, flooding, etc. would need to be taken into account before a refined list of additional sites could be determined. However, from a market perspective, there appears to be sufficient additional sites to meet the shortfall in supply compared to the forecast requirement.

Table 42 – Candidate Sites to be Further Considered

Candidate Site Ref.	Site Name	Size for Employment (ha)	Should the site be further considered for employment?
184	Land adjacent to Kerry Roundabout, Newtown	18.4	Yes
241	Charlies Stores, Buttington	3.75	Yes, if northern site is also allocated.
299	Land to the north of Parc Hafren Industrial Estate, Llanidloes, SY18 6RB	4.53	Yes
304	Land adjoining Black Mountain Business Park, Three Cocks	5.16	Yes
317	Land at Four Crosses	1.2	Yes
354	Land West of Montgomeryshire Natural Spring Water Co Church Stoke	3.3	Yes
355	Land South of Montgomery Natural Spring Water, Church Stoke, Powys, SY15 6AR	3.7	Yes
366	North Field adjacent to Offa's Dyke Business Park	5.38	Yes, as a priority
385	Border Hardcore & Rockery Stone Co Ltd	16.39	Yes
414	Land West of Brynygroes, Ystradgynlais	0.75	Consider. Need to demonstrate market demand and uses.
426	Land south / adj Brynberth Ind Estate, Rhayader	1.59	Yes
Mixed-use Sites			
168	Site adjacent NPTC Newtown Campus, Llanidloes Road Newtown Powys SY16 4HU	5.7	Yes
183	Land adjacent to Kerry Roundabout and Treowen, Newtown	8.5	Yes
239	Land adj. Brecon Pharmaceuticals, Hay on Wye	4.21	Yes
419	Global Centre of Rail Excellence	599.27	Yes, in line with GCRE
308	Land Adjacent to Dolwgwenith and Tan Y Bryn, Bryn Du Road, Llanidloes, Powys. SY18 6YR.	5.16	Yes, in line with approval.
268	Llandrinio Grange Farm, Arddleen	10.39	Consider Dependent on residential / mixed use considerations
Total (excluding GCRE)		**98.11**	

Sources: Candidate site promoters, Powys CC, BE Group assessment, 2023

8.15 Further sites that are allocated within the RLDP should be appropriate to meet market needs, in terms of location, appropriateness for employment uses, appropriate for size requirements of businesses and ability to be brought forward in a timely manner to meet market needs.

8.16 The main market needs identified in this document are for B2/B8 units, in particular small and medium units. Sites should be provided that can be developed for units for a range of sizes up to 500 sqm, likely to be in multi-unit schemes. However, there is some demand for larger units (1,000-3,000 sqm) and thus planning should also allow for some sites, particularly in Newtown and Welshpool, that can accommodate such unit sizes. The office market is a smaller volume market and in the foreseeable future not an attractive development market in Powys. However, flexibility in the site allocations should be provided to ensure that if there is developer interest (potentially through a hybrid scheme offering office units as part a broader employment scheme) then this can be accommodated within Powys.

Recommendation 6: Future Reviews

8.17 Paragraph 7.10 of the Welsh Government Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan, states that: "*Reviews of the whole evidence base, both larger than local and local studies, will most likely reflect the 4 year development plan cycle; however, an earlier review might be considered if certain employment land related targets are not being achieved and are identified through the LDP Annual Monitoring Report."*

8.18 In light of this it is recommended to conduct regular updates of the forecasts and planning for employment land. Furthermore, the annual monitoring and employment land availability documents should continue to collate data on employment land and premise completions and permissions in a consistent manner.

8.19 The Covid-19 pandemic, changes to workplace dynamics and current economic volatility highlight the need for reviews in light of changing circumstances.

Recommendation 7: Maintain Awareness of External Influences

8.20 Welsh planning policy highlights the importance of joint working and 'more than local' planning, to understand the interconnectedness of local authority areas. Regional and subregional collaboration is appropriate for employment land, particularly in relation to strategic sites and the implementation of the Mid Wales Growth Deal.

APPENDIX 1 – SITE SCORING CRITERIA

Appendix 1 – Site Scoring Systems

Employment Allocations		
Site Location and Access	Proximity to strategic highway network	• Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to major A-road – score 8/9 • Site within 0.5km of A-roads – score 6/7 • Site on other key arterials within Powys – score 4 • For each further half km distance from key arterials, reduce score by one point
	Prominence within Powys	• Site adjacent to, and visible from motorway – score 10/9 • Site adjacent to, and visible from other A-roads – score 8/7 • Site adjacent to, and visible from a major B road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	• Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Planning Status		• If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	• If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0
	Constraints	May be physical (including access), planning, or legal Reduce score by 2 for each constraint If there are none – score 10
	Environmental Setting	Subjective, score 0 to 10, examples: • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2
	Flexibility	Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.
Site Availability		• Site available to develop within 0-1 year – score 10 • Site available to develop within 1-3 years – score 6 • Site available to develop 3-5 years – score 3 • Site available to develop 5+ years – score 0

Existing Employment Areas		
Site Location and Access	Proximity to strategic highway network	• Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to major A-road – score 8/9 • Site within 0.5km of A-roads – score 6/7 • Site on other key arterials within Powys – score 4 • For each further half km distance from key arterials, reduce score by one point
	Prominence within Powys	• Site adjacent to, and visible from motorway – score 10/9 • Site adjacent to, and visible from other A-roads – score 8/7 • Site adjacent to, and visible from a major B road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	• Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Site Conditions	Ability to expand	• Large choice of several sites available for growth – score 10 • Some choice of sites available – score 7 • Limited choice of sites available – score 5 • Potential to expand to neighbouring sites, though no planning in place – score 3 • Estate is at capacity and no neighbouring options available – score 0
	Access and Congestion	Subjective, score 0 to 10, considering: • Sufficiency of car-parking • Congestion of internal roads • Entry to site • Appropriateness and capacity of roads leading to site • Turning capacity for heavy vehicles
	Interface with Neighbouring Sites	• No neighbouring uses that would limit activities on site – score 10 • Some potentially sensitive neighbouring uses but sufficient screening in place – score 7 • Neighbouring uses are moderately impacted by site uses, mitigated by basic screening – score 5 • Site is within a residential area and accessed through residential streets – score 0-2
	Building Quality and Condition	• High quality, modern premises in excellent state of repair – score 10 • Modern premises in good condition – score 8/9 • 1990's build in good or reasonable state of repair – score 6/7 • Older stock in moderate state, requiring some upkeep – score 4/5

Existing Employment Areas		
		• Dilapidated buildings, in need of refurbishment, not fit for purpose – score 0-3
	Site Amenity	Subjective, score 0 to 10, considering: • Landscaping • Site layout • On-site services

APPENDIX 2 – EXISTING EMPLOYMENT SITES SCORING

Site Ref.	Site Name	Realistic Supply for B-Class Uses (Ha)	Total Score, Max 100	Proximity to Strategic Highway Network	Prominence within Powys	Public Transport	Sequential Test	Planning Status	Services Availability	Constraints	Environmental Setting	Flexibility	Site Availability
Employment Allocations													
P58 EA1	Woodland Business Park, Ystradgynlais	1.28	61	7	2	5	10	4	10	6	8	3	6
P08 EA1/ P08 EC1	Wyeside Enterprise Park, Builth Wells	0.49	59	7	3	0	10	4	10	6	7	6	6
P28 EA1	Heart of Wales Business Park, Llandrindod Wells	2.09	71	8	8	10	10	4	10	0	9	6	6
P51 EA1	Broadaxe Business Park, Presteigne	0.23	69	4	3	5	10	10	10	0	7	10	10
P52 EA1	Brynberth Business Park, Rhayader	3.7	47	8	2	5	10	4	3	0	4	5	6
P35 EA1	Parc Busnes Derwen Fawr, Llanidloes	0.45	65	7	4	5	10	4	10	2	8	8	6
P48 EA1	Llanidloes Road, Newtown	2	68	9	8	5	10	4	3	6	10	10	3
P02 EA1	Abermule Business Park, Abermule	0.52	79	9	6	5	7	10	10	6	10	6	10
P12 EA1	Church Stoke, Church Stoke	0.64	49	7	4	0	10	4	3	6	4	3	3
P59 EA1	Buttington Quarry, Trewern	6	30	9	0	5	7	4	3	0	2	0	0
P60 EC1	Offa's Dyke Business Park, Welshpool	1.11	71	9	8	0	7	4	10	0	10	8	10

P18 EA1	Four Crosses, Four Crosses	0.21	56	4	2	5	10	4	10	6	9	0	6
P42 EA1	Treowain Enterprise Park, Machynlleth	1.26	66	7	2	10	10	4	3	8	9	10	3
Mixed-Use Sites													
P21 MUA1	Gypsy Castle Land, Hay-on-Wye	2.4	55	4	6	5	10	4	3	2	10	8	3