REPORT Nº 70031978-001

EMPLOYMENT SECTORAL STUDY

FINAL REPORT

CONFIDENTIAL

NOVEMBER 2017

EMPLOYMENT SECTORAL STUDY

FINAL REPORT

Carmarthenshire County Council

Draft Report
Confidential

Project no: 70031978
Date: November 2017

WSP | Parsons Brinckerhoff
70 Chancery Lane
London
WC2A 1AF

www.wsp-pb.com

QUALITY MANAGEMENT

ISSUE/REVISION	FIRST ISSUE	REVISION 1	REVISION 2	REVISION 3
Remarks	Initial report structure for comment	Draft Report	Draft Final Report	Final Report
Date	08/05/2017	30/06/2017	05/09/2017	28/11/2017
Prepared by	Fintan Geraghty Charlotte Rhee	Fintan Geraghty Charlotte Rhee	Fintan Geraghty Charlotte Rhee	Fintan Geraghty Charlotte Rhee
Signature				
Checked by	Fintan Geraghty	Fintan Geraghty	Fintan Geraghty	Fintan Geraghty
Signature				
Authorised by	Fintan Geraghty	Fintan Geraghty	Fintan Geraghty	Fintan Geraghty
Signature				
Project number	70031978-001	70031978-001	70031978-001	70031978-001
Report number	001	002	003	004
File reference				

TABLE OF CONTENTS

TABLES

FIGURES

1 INTRODUCTION

1.1 BACKGROUND TO THE STUDY

1.1.1 Carmarthenshire County Council commissioned WSP (formerly WSP | Parsons Brinckerhoff) to undertake an Employment Sectoral Study. This is because as part of an ongoing review of evidence in support of the Adopted Local Development Plan (LDP), and other corporate documents and strategies, the Council requires an understanding of economic and employment trends in Carmarthenshire.

1.1.2 The study will enhance the Council's understanding of employment need by sector and how this will manifest itself over the short to medium term. By identifying the current and market requirements by sector, the commission takes into account the Council's strategic objectives and those of the Swansea Bay City Region (SBCR). The future economic development of the County is viewed in the context of the wider sub-region where the Swansea Bay City Deal has recently been signed, securing £1.3 billion for Swansea, Carmarthenshire, Neath Port Talbot and Pembrokeshire councils.

1.1.3 The work also follows on from previous undertakings and studies, including:

- An Employment Land Study (ELS) undertaken in 2010;
- The Carmarthenshire Local Development Plan (LDP), adopted in December 2014;
- The Council's Transformation Strategy, covered in detail in the Strategic Regeneration Plan for Carmarthenshire 2015-2030, published in November 2015; and
- Other core strategies.

1.1.4 With an emphasis on employment land as one important element of the study, the definition of 'employment' land use requirements focuses on the following:

- B1 and B2 business use classes (e.g. offices, research & development and light industry); and
- B8 use class (e.g. general industry and storage or distribution, such as warehousing).

1.1.5 The study provides background evidence to be used in the County's Employment Land Review (ELR) as well as inputs as part of any LDP Review.

1.2 REPORT STRUCTURE

1.2.1 The report is set out so that it covers each of the key areas in chronological order and reflects the range of topics set out in the original Service Brief issued in February 2017 and the subsequent meeting with the Council in Carmarthen on 5th April 2017.

1.2.2 The remaining chapters in the report are:

- Chapter 2 sets out the Economic Context for the County, including general economic characteristics as well as the key growth sector and growth areas;
- Chapter 3 contains a summary of the current supply of employment space in Carmarthenshire;

- Chapter 4 covers the future requirements for employment space (e,g, estimates of future employment space requirements based on different growth scenarios);
- Chapter 5 discusses the “demand / supply balance” (e.g. a comparison of estimated land requirements with the current supply of employment space);
- Chapter 6 covers policy and delivery issues (e.g. the policy and other measures that need to be considered to support the existing site portfolio and meet future business needs); and
- Chapter 7 summarises the findings of the work.

2 ECONOMIC CONTEXT

2.1 INTRODUCTION

2.1.1 The purpose of this chapter is to set out the overall “economic context” in Carmarthenshire before going on to define the key influences on future employment space requirements for each employment sector.

2.1.2 The objective is to cover the various sectors where there is a strong growth trajectory and not just the ‘traditional’ sectors where general background growth is to be expected. This is a very important and exciting time for Carmarthenshire’s economic development as the county undergoes a transformation from a reliance on more traditional sectors (such as manufacturing and agriculture) to a series of new, high value sectors.

2.1.3 This is especially relevant in the context of the SBCR and the various initiatives and developments that are taking place.

2.1.4 Carmarthenshire plays a major role in the SBCR’s plans and this was demonstrated in March 2017 with the signing of the £1.3 billion Swansea Bay City Deal. The Deal will boost the local economy by £1.8 billion and will generate almost 10,000 new jobs in the area covered by the SBCR over the next 15 years.

2.1.5 Eleven major projects were given the go ahead and will deliver jobs in the energy, ‘smart’ manufacturing, innovation and life sciences sectors. There will also be investment in the region’s digital infrastructure and workforce skills and talent pool.

2.1.6 All of these are especially relevant to Carmarthenshire as the Deal features three key developments in the county that will go a long way to meeting its strategic and economic objectives:

- A Wellness and Life Science Village in Llanelli;
- A creative industry project at Yr Egin in Carmarthen; and
- A skills and talent initiative which will support skills development for all 11 different projects in the county.

2.1.7 All of these are discussed in more detail later in the chapter.

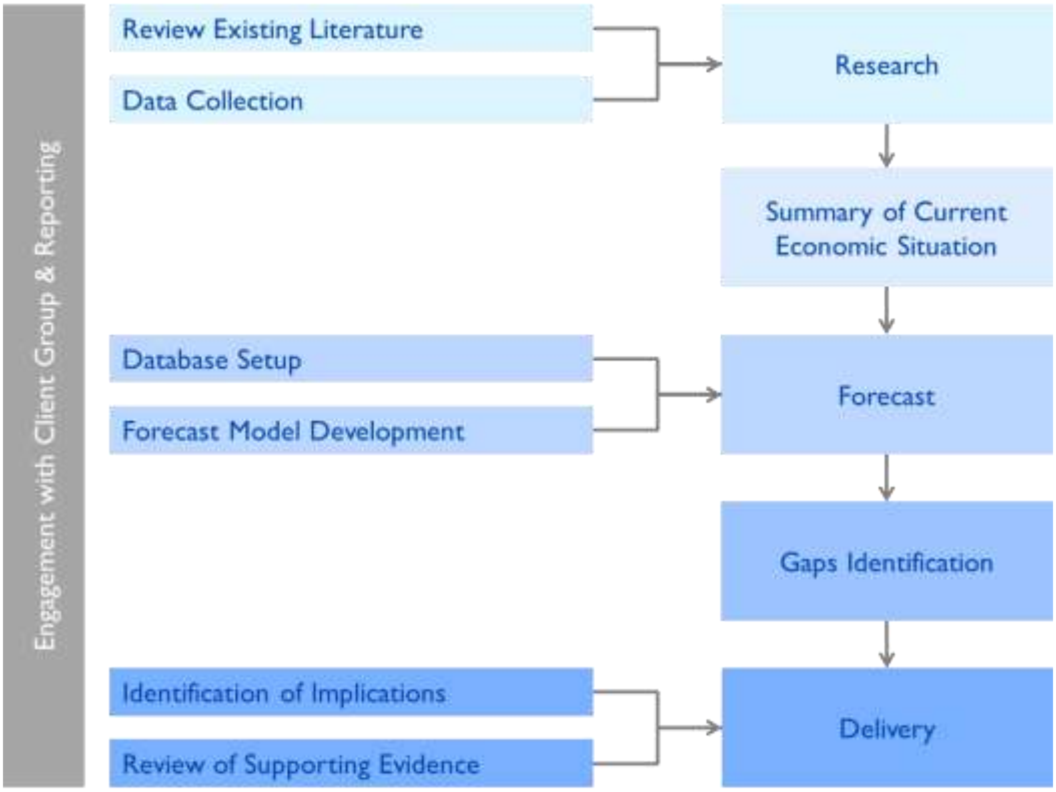
2.1.8 Several of the new sectors in Carmarthenshire are distributed across the county with life sciences centred around Llanelli (as featured in the recently signed City Deal) as well as the creative and digital industries centred around Carmarthen.

2.2 APPROACH TO THE STUDY

2.2.1 The approach taken for the overall study is set out in Figure 2-1. This shows how a review of existing literature and data collection formed the first part of the study before the forecasting element of the work was undertaken.

2.2.2 The final elements of the work are also shown in Figure 2-1 where the identification of 'gaps' and policy implications is undertaken.

Figure 2-1 Methodology Diagram



2.2.3 The work takes into account the Council's strategic objectives and those of the SBCR. This allows an assessment of how current trends can be challenged and adapted to maximise economic growth opportunities.

2.2.4 Another objective forming part of the SBCR City Deal is a skills and talent initiative. This will provide educational and training to support the workforce who will deliver specific sector skills to meet demand in the Digital, Life Sciences and Wellbeing, Energy and Smart Manufacturing sectors. The initiative will therefore play in key role enabling Carmarthenshire to achieve its economic growth objectives.

2.3 ECONOMIC PERFORMANCE OF CARMARTHENSHIRE

GVA AND GVA PER HEAD

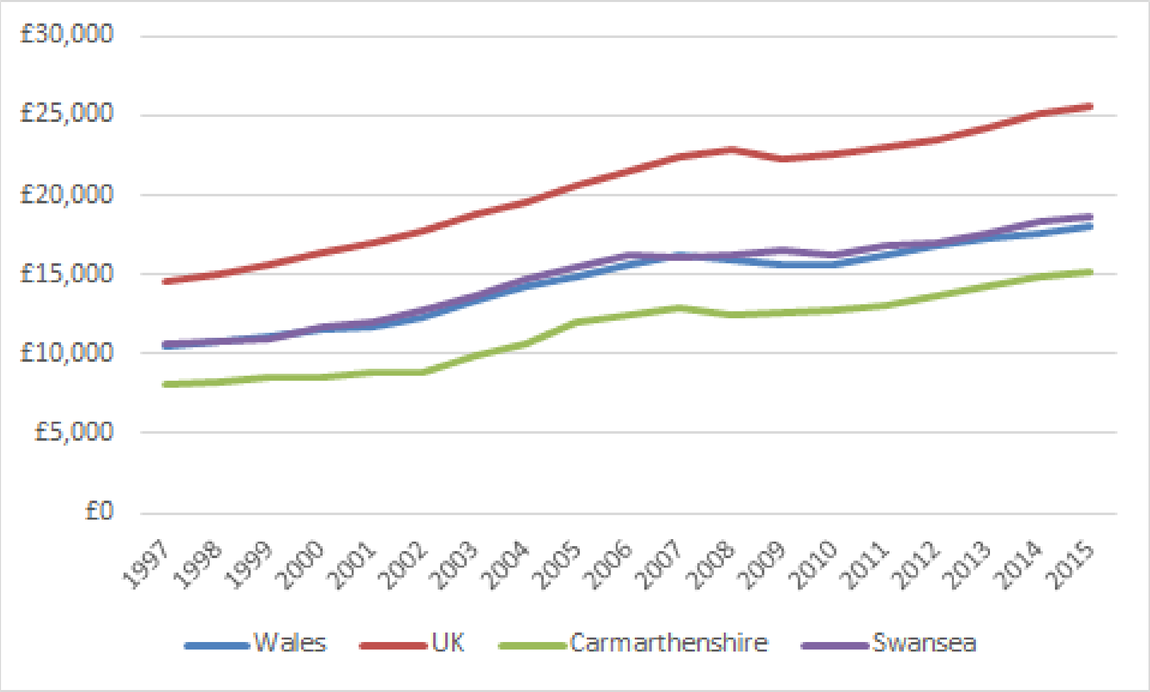
2.3.1 Carmarthenshire's economic performance in recent years can best be measured by examining Gross Value Added (GVA) data, especially GVA per head data compiled by the Office of National Statistics (ONS). GVA per head is a good indicator of productivity or the amount of economic wealth generated by each person.

2.3.2 Figure 2-2 below shows GVA per head trends for Carmarthenshire, Swansea, Wales and the UK. Not only does GVA per head in Carmarthenshire lag behind that in the other areas (GVA per head is less than 60% the value in the UK as a whole, for example), the gap with the UK average has been growing over time.

2.3.3 In 1997, Carmarthenshire's GVA per head was £6,440 lower than that in the UK whereas by 2015, the gap had increased to £10,440. This clearly indicates that for the county to close the productivity gap, it needs to continue its focus on economic transformation and the provision of suitable skills and employment land to meet these objectives.

2.3.4 The risk to the county is that without these interventions, the gap will continue to grow, thus making it difficult for new sectors and businesses to thrive.

Figure 2-2 GVA Per Head (Productivity)



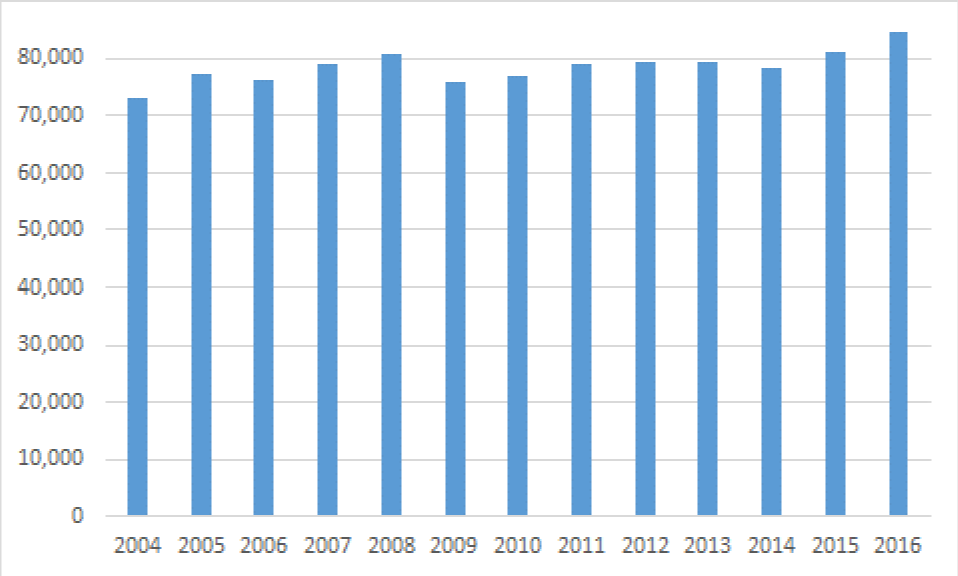
EMPLOYMENT AND THE LABOUR MARKET

2.3.5 In 2016, 84,700 people in total were employed in Carmarthenshire. This was the second year in succession where the total had risen by 4% compared to the previous year and is a good indicator of the growth already taking place in the county.

2.3.6 The trend in total employment is shown in Figure 2-3. What is evident is 1) the steady growth that took place in the run-up to the economic recession in 2009, 2) the impact of the downturn and 3) the gradual return to growth after 2009.

2.3.7 Figure 2-3 also shows how the two consecutive years of 4% growth (in 2015 and 2016) followed four years of 'flat' growth and a slight decrease in 2014.

Figure 2-3 Employment Trends 2004 - 2015



2.3.8 There is a good distribution across the different employment sectors in Carmarthenshire. In 2015, for example, over 25% of the total were employed in the public sector (e.g. in public administration, education, health and social services). 8,000 positions (10% of the total) were in the manufacturing sector and 12,000 (15% of the total) were employed in the wholesale and retail sector.

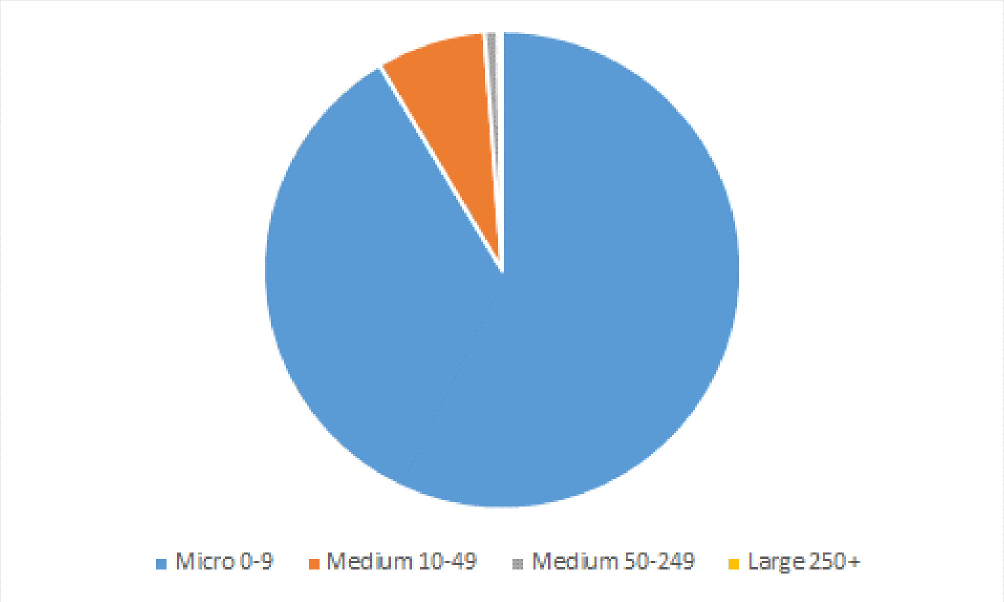
2.3.9 This indicates a focus on 'traditional' economic activities in the country and with the transformation of the economy already underway, these proportions will be expected to change over time as greater focus is given to some of the higher value sectors, particularly in the digital, creative and life sciences sectors.

2.3.10 Self-employment also forms a high proportion of the total in Carmarthenshire with over 15,200 people categorised as self-employed in both 2015 and 2016. This trend towards small or 'micro' businesses is reflected in the ONS NOMIS data and summarised in Figure 2-4.

2.3.11 The figure clearly shows that over 90% of private sector businesses / enterprise in the county have 9 or fewer employees.

2.3.12 Statistics collated on the types of businesses in Carmarthenshire indicate that 'agriculture, forestry and fishing' still dominates with 28% of all businesses being in this category. This is to be expected given the large agricultural areas in the county.

Figure 2-4 Business Size Profile



2.4 GROWTH ASPIRATIONS AND EMPLOYMENT SECTORS IN CARMARTHENSHIRE

2.4.1 The Strategic Regeneration Plan for Carmarthenshire sets out the different sectors across the county and the important role they will play in future economic development. Each sector is reviewed in turn below.

2.4.2 As reported previously, Carmarthenshire is also part of the Swansea Bay City Region whose economic objectives include:

- Business growth, retention and specialisation;
- Develop skills and training;
- Maximising job creation;
- Developing a knowledge based economy that fosters innovation; and
- Distinctive places and competitive infrastructures.

2.4.3 Before discussing individual areas and their employment potential, it is important to describe the role infrastructure and business skills development will play in Carmarthenshire's future economic success.

INFRASTRUCTURE AND TRANSPORT

2.4.4 Within the county, significant focus has been applied to local rural connectivity and accessibility to employment. Transportation infrastructure is a prime enabler of economic activity and supports other sectors of the economy.

2.4.5 Strategic and local infrastructure has been developed to promote economic growth and activity by building better connections. A key principle is to improve access between key settlements and employment sites. The Swansea Bay City Region is also facilitating investment in transport projects supporting this principle.

2.4.6 Examples of projects in Carmarthenshire that will support economic development include:

- Cross Hands Link Road: will open up access to key strategic employment sites;
- Carmarthen West Link Road: access into the new academic and media quarter (to support the forthcoming S4C investment); and
- Improved rural connectivity: connectivity to the county’s market towns and rural conurbations is critical to future economic development.

2.4.7 Other important transport projects that will play a major role in future economic development include the Ammanford and Llandeilo Bypass schemes.

BUSINESS AND SKILLS

2.4.8 Workforce demography in the county has changed in recent years, with strong growth emerging in the ‘Creative Industries’, ‘Energy Environment’ and ‘Food and Farming’ sectors.

2.4.9 Research identifies that there are some general skills challenges across the Food, Tourism and Creative sectors. The most notable include leadership and management, business administration and sales and marketing. Carmarthenshire County Council, however, works directly with key employers and education providers in the county to develop skills in the future workforce.

2.4.10 Since 2008, Carmarthenshire County Council has successfully delivered a grant to businesses in the county totalling over £2m, levering a further £3.2m in private investment and creating over 400 jobs and safeguarding 1,800 positions.

2.4.11 Also of critical importance here is the recently announced Skills and Talent Initiative (part of the SBCR City Deal). The Initiative will work in conjunction with the City Deal projects to identify the specific skills that are needed to support development in the region. Working with public and private sector training providers, the project will 1) develop and deliver courses, apprenticeships, 2) expand under / postgraduate provision and 3) engage with schools to ensure that local people are able to benefit from local employment opportunities.

2.4.12 The Initiative will therefore be of key importance within Carmarthenshire as it develops the skills and experience required for the growth in key sectors.

2.5 KEY EMPLOYMENT SITES

2.5.1 Key sites with significant potential for supporting growth in Carmarthenshire are grouped into the following categories as set out in the Council's 'Transformations' document:

- Strategic regeneration sites;
- Primary towns; and
- Vibrant market towns.

STRATEGIC REGENERATION SITES

2.5.2 Strategic regeneration sites are identified as high potential strategic business and employment sites in Carmarthenshire. Delta Lakes, the Beacon and Cross Hands Strategic Zone are all featured with the LDP, for example (in the following paragraphs describing each of these areas, the relevant LDP reference code is provided).

DELTA LAKES

2.5.3 Delta Lakes is part of South Llanelli Strategic Zone (Site 3, GA2/MU9). It is located to the south of Llanelli adjoining the principal Coastal Link Road which is a gateway into the Carmarthenshire Coastal Belt. The site is considered to be Llanelli Waterside's most prestigious business park location and comprises a mix of commercial and business development. Two-storey office developments are envisaged for Delta Lakes along with a designated area for the healthcare sector. In total, the potential exists to accommodate approximately 275,000 square feet of floor space. Development of the new Wellness and Life Science Village is underway in Delta Lakes and is predicted to create up to 2,000 jobs and boost the economy by £467 million over 15 years.

THE BEACON

2.5.4 The Beacon (part of Dafen, Site 4, GA2/E1) is a business location located on the edge of Llanelli, close to Junction 48 of the M4. The site provides office space for150 people and is home to some of the top companies in Carmarthenshire. The Beacon has a further development land site to support innovation and to attract key sector developments such as Advanced Manufacturing, Life Sciences, Professional and Commercial services / special projects.

CROSS HANDS EAST

2.5.5 The Cross Hands East site is located alongside the Cross Hands Business Park with immediate access to the A48 and M4. The site covers approximately 19 hectares and is predicted to be the next major Employment Zone in the county. Investments are targeted towards key development sectors with a vision to create a modern business park with a 'green' profile.

CROSS HANDS FOOD PARK

2.5.6 The Cross Hands Food Park is home to some of the UK's largest food producers. The site employs in excess of 1,000 people and is continually growing with further expansions. It is conveniently located off the M4 with suppliers based nearby. The Food Park is part of the wider Cross Hands Growth Zone, and with investment on the site in excess of £50m and rising, it has reinforced Carmarthenshire's position as a food production county.

GROWTH AREAS

2.5.7 The Carmarthenshire LDP identifies three growth areas and these are described in detail below.

CARMARTHEN

2.5.8 The town of Carmarthen is strategically located at the junction of the A48 and A40 and is on the London to Fishguard rail link in the heart of Carmarthenshire. As the major administrative centre for Carmarthenshire, the town is both a major employer and a regional retail centre. In 2010, for example, St Catherine's Walk retail centre opened, providing over 2,270 m^2 of commercial space. Carmarthen is also home to a major University Campus.

LLANELLI

2.5.9 Llanelli has seen considerable economic change over recent decades with development in housing, retail, leisure and commercial offices. Recently, the Council has bought town centre properties worth £1.5million to tackle poverty by creating jobs, encouraging skills development, improving housing, providing facilities and helping people into work. The Council is targeting key buildings within the town centre so that it can control their re-development and set affordable rents that will attract new businesses and tenants. Recently, another £1m has been allocated to regenerate the town.

AMMANFORD / CROSS HANDS

2.5.10 Ammanford is the third largest settlement in Carmarthenshire. It is located at the intersection of the cross roads between the A474, A483 and Quay Street. The town is also served by the Heart of Wales railway line. The town offers visitor and retail facilities and has seen significant investment in areas such as streetscapes, landscapes and shop frontage improvements.

SERVICE CENTRES AND LOCAL SERVICE CENTRES

2.5.11 Carmarthenshire comprises a mix of service centres and local service centres. Employment sites within these areas are targeted for improvement, in terms of physical redevelopment and business support initiatives to accelerate economic activity. Connectivity is also planned to be improved both physically and virtually.

2.5.12 The centres are shown in Table 2-1 below.

Table 2-1 Service Centres and Local Service Centres

Service Centres	***Local Service Centres***
Llandovery	Brynamman
Llandeilo	Ferryside
Newcastle Emlyn	Glanaman/Garnant
St Clears	Hendy
Whitland	Kidwelly
Burry Port/Pembrey	Laugharne
	Llangadog
	Llanybydder
	Pontyates/Meinciau/Ponthenri
	Pontyberem/Bancffosfelen
	Trimsaran

2.5.13 Expected outcomes from these initiatives are lower commercial property vacancy rates and increased footfalls. Moreover, public and private investment will be levered in, jobs will be created, people will be supported into work and poverty levels will be reduced.

2.6 KEY TRANSFORMATIONAL PROJECTS

2.6.1 Carmarthenshire has experienced a transition in recent years and the ambition is to regenerate the county to achieve the foundation for a strong and healthy economy. In support of this, Carmarthenshire County Council has planned six key transformational projects.

2.6.2 The sectors targeted include the creative industries, tourism, agri-food, advanced manufacturing, energy and environment, financial and professional services.

2.6.3 The projects are expected to create over 5,000 new jobs and close the productivity gap between Carmarthenshire and the UK, reaching 90% of the UK's average GVA. This also aligns well with the LDP's Strategy whereby certain strategic sites have been identified and are set out within Strategic Policy SP4.

2.6.4 As described, the sites in the different areas below were designated by taking into account their scale, nature and strategic location.

AMMANFORD

2.6.5 Ammanford is a market town with a large potential for economic growth. Transport improvements alone are recognised to bring significant benefits in terms of journey time savings and employment accessibility. Investments in employment space and gateway sites are also recognised as contributors to growth increasing employment space, leisure use and housing.

2.6.6 Ammanford also has a Taskforce that has an overall "action plan" in place to focus on key buildings, sites and premises. The Taskforce also covers environmental and access issues as well as marketing, promotions and events. With respect to people and training, there are regeneration initiatives and loan funds in place to bring vacant or underused buildings back into employment use.

CARMARTHEN

2.6.7 Although Carmarthen has been undergoing major regeneration in recent years (with several new developments coming on stream), there are still several projects and opportunities still to take place. It is anticipated that these will come to fruition in the near future, not least the major development at Yr Egin where a large proportion of S4C's activities will re-locate to the campus site. This will then act as the incubator / catalyst for a creative and digital hub that will set up there. Yr Egin is described in more detail below.

YR EGIN

2.6.8 Yr Egin, a new media and culture hub, is predicted to have significant positive impact on Carmarthen. Based on the office and workspace as well as further potential development, around 200 full-time posts will be generated and the direct employment will support another 500 jobs within the region.

CARMARTHEN WEST

2.6.9 In Carmarthen West a new link road is planned which will increase movements towards the new developments linked to Yr Egin and S4C. This investment will increase the housing stock with 1,200 new homes being built along the new road.

PIBWRLWYD

2.6.10 Pibwrlwyd College Campus is part of the wider Transformational Project of Carmarthen. Strategically, the site represents a key area for future employment growth for Carmarthen. The site offers potential for the consolidation and re-development of the existing elements of Carmarthenshire College and a business park.

CARMARTHENSHIRE COASTAL BELT

2.6.11 The Carmarthenshire Coastal Belt offers opportunities for economic development, particularly through commercial and leisure opportunities, attracting visitors to the area. The three main longer term priorities for the Llanelli Waterside Joint Venture are Delta Lakes, North Dock and Burry Port with investments planned in sites for business, commercial, leisure, recreational, retail and residential use.

CROSS HANDS GROWTH ZONE

2.6.12 Cross Hands Growth Zone is closely linked with both the food and advanced manufacturing sectors. In the evaluation of the Cross Hands East infrastructure development (undertaken in 2015), it was stressed that an ‘anchor’ tenant in the green sector is essential as are generous central government subsidies to encourage firms to relocate to Cross Hands.

2.6.13 The 2015 evaluation also noted that Cross Hands could achieve success through a “top-skim” of local businesses to create a concentration across high-value sectors. Analysis of economic trends suggest that despite a contraction in the local economy since 2010, a strong recovery is now underway in the region.

2.6.14 Within this, the professional, scientific and technical sector stands out both for its high growth potential and its propensity to produce economic benefits and high value jobs. By forming a critical mass of businesses from this and complimentary sectors, the Cross Hands site will be better placed to attract inward investment.

2.6.15 The sectors being targeted as part of the marketing campaigns are Energy and Environment, Creative, Advanced Manufacturing, Financial and Professional as well as Agri-Food Technology.

2.6.16 There are five development zones identified in the Cross Hands Growth Zone and each of these is described below.

FOOD ZONE – CROSS HANDS FOOD PARK

2.6.17 Scope exists to enhance the food park and to capitalise on the significant investment made to date.

BUSINESS ZONE – CROSS HANDS BUSINESS PARK

2.6.18 The business zone is a significant employment site with around 800 people employed. It comprises 38 hectares of mixed use development, supporting major retailers and commercial establishment, and has a further four hectares available for retail and commercial growth.

EMPLOYMENT ZONE – CROSS HANDS EAST STRATEGIC EMPLOYMENT SITE

2.6.19 This site is planned to accommodate businesses in key sectors such as life sciences, financial and professional, advanced manufacturing, environmental, creative and agri-food technologies. It is constructed in two phases, Phase 1 is complete and will generate over 17,000 square metres of floor space across 8.5 hectares of land. Phase 1 is expected to create around 650 jobs with a further 500 anticipated for Phase 2. The site will be a mix of high quality industrial, office and potential hotel uses.

MIXED USE ZONE – CROSS HANDS WEST

2.6.20 Cross Hands West comprises 21 hectares of mixed use land and is currently under development with expectations of £25 million of private sector investment.

RESIDENTIAL AND MIXED USE ZONE – EMLYN BRICKWORKS

2.6.21 This is a mixed use redevelopment which includes proposals for 250 homes on a 21 hectare site. The site is expected to benefit from the proposed phase two of the Cross Hands link road.

LLANELLI

2.6.22 Although there has been significant investment in Llanelli in recent years (not least the Wellness Village at Delta Lakes), further opportunity to enhance the town centre exists and investments of £60 million are predicted in the town centre. Several investment projects are planned providing housing, retail opportunities and infrastructure improvements. The town has also been made a Business Improvement District (BID), with a £700,000 loan fund made available to the business community (to improve their properties, for example).

THE RURAL ECONOMY

2.6.23 With rural areas accounting for more than 40% of the county's population, the rural economy has a significant influence on wider regeneration objectives. Key issues that may challenge employment and prosperity growth in rural Carmarthenshire are identified as:

- A predominance of small and medium sized businesses with 87% of businesses employing less than 9 employees;
- Higher proportions are employed in low value added services such as agriculture;
- Migration of talented and skilled young people is a key issue for rural areas which exhibit a lower proportion of 20-39 year olds;
- Shortage of employment space in rural areas; and
- All rural wards, except Carmarthen town and Llandeilo are highlighted within the top 30% most deprived in relation to access to services.

3 CURRENT SUPPLY OF EMPLOYMENT SPACE

3.1 INTRODUCTION

3.1.1 Providing a good supply of employment land is not only necessary for capturing the benefits from new business developments, it also acts as a generator of growth by attracting more investment, thereby generating more employment opportunities and GDP.

3.1.2 Carmarthenshire County Council is responsible for ensuring that sufficient employment land is available to meet an identified need. More specifically, Planning Policy in Wales is summarised in Figure 3-1.

Figure 3-1 Planning Policy in Wales (Ed.9), Section 7.5.1

> Development Plans should seek to provide the right amount of land and qualitative mix of sites to meet the market demand for economic development uses.

3.1.3 This chapter contains a description of recent of employment space supply trends as well as a description of the key plans and policies that underpin the supply of land. These cover the adopted Local Development Plan (LDP) of December 2014, the Employment Land Review (ELR) of 2016 and the second Annual Monitoring Report (AMR) where data for the year 1st April 2016 to 31st March 2017 has been provided.

3.2 LOCAL DEVELOPMENT PLAN (LDP), 2014

3.2.1 In the most recent LDP, sufficient land was allocated for 111.13 hectares covering a mix of B1, B2 and B8 land uses as well as sui generis uses. The breakdown of this allocation is covered by Policy SP7 in the LDP (Employment – Land Allocations). The LDP period covered 2006 through to 2021.

3.2.2 The location of the allocated sites reflected the importance of the Growth Areas (Carmarthen, Llanelli and Ammanford / Cross Hands) as they were allocated 95.15 hectares out of the total 111.13 hectares. The remaining 15.98 hectares were distributed across the remaining settlements.

3.2.3 At the time of the LDP's adoption in December 2014, the following completions and commitments had taken place:

- Completions: 5.7 hectares;
- Completions (not forming part of allocated figure): 23.65 hectares;
- Commitments: 16.18 hectares; and
- **Residual employment land: 89.25 hectares**.

3.2.4 So at a point just over half-way through the LDP period, just over 89 hectares of the allocated 111 hectares remained as residual.

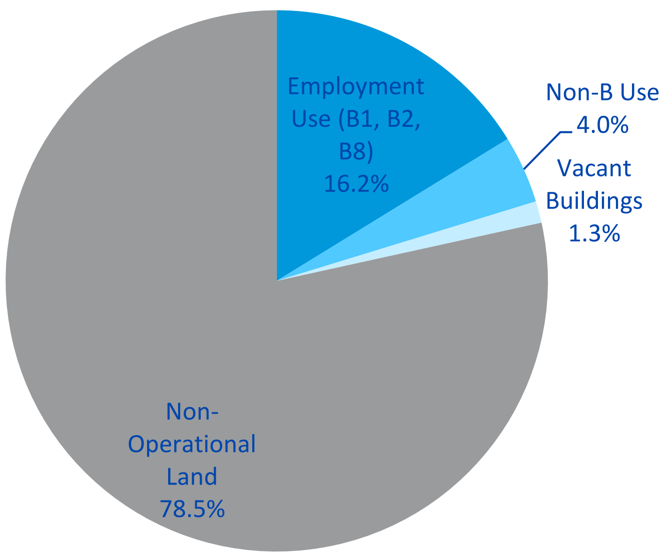
3.3 EMPLOYMENT LAND REVIEW, 2016

3.3.1 The ELR sets out the current supply of employment land based on information obtained from corporate partners in Economic Development and Corporate Property.

3.3.2 This first ELR was used to provide evidence to support the LDP Annual Monitoring Reports (AMRs) and will feed into the four year review of the LDP. AMRs are required to be prepared for each year up to the four year review and the first AMR was published in October 2016 (covering the year 1st April 2015 to 31st March 2016).

3.3.3 The ELR distinguishes between existing and proposed sites. Existing sites are disaggregated into buildings in use, vacant buildings and land not suitable for development. Buildings in use include employment land for B use classes B1, B2 and B8. Nevertheless, it is acknowledged that other non-B use classes are closely related to employment use and these are therefore also covered. Figure 3-2 illustrates the allocation of existing land according to the ELR 2016.

Figure 3-2 Existing Land



3.3.4 The breakdown of existing land by the different Growth Areas is illustrated in Table 3-1. The table also shows the land allocated for proposed employment developments.

Table 3-1 Total Area of Land Break Down (hectares)

	Employment Use (B1, B2, B8)	Non-B Use	Vacant Buildings	Non-Operational Land	Total Existing Land	Proposed Land	Total Land
Carmarthen	2.96	2.33	0.49	20.61	26.39	25.33	**51.72**
Llanelli	37.77	5.09	2.2	169.17	214.23	32.58	**246.81**
Ammanford	13.935	3.06	0.495	68.17	85.66	37.24	**122.9**
Service Centres	8.44	4.71	0.82	35.81	49.78	11.57	**61.35**
Local Service Centres	4.28	1.71	0.68	27.2	33.87	1.21	**35.08**
Sustainable Communities	3.5	0.75	0.96	21.93	27.14	3.20	**30.34**
	70.89	**17.65**	**5.645**	**342.89**	**437.07**	**111.13**	**548.2**

3.3.5 As shown in Table 3-1, 111.13 hectares of employment land allocated in Policy SP7 is planned to be developed over the LDP period.

3.3.6 As part of the evidence presented at the LDP examination, 30.27 hectares of those sites allocated as proposed employment sites in the existing UDP had been delivered for employment purposes. This included employment provision delivered on mixed use sites. Nearly all (95%) of the land was delivered and available leaving only a very small proportion of newly delivered land vacant.

3.3.7 Preparation for the first AMR revealed that take-up of employment land on LDP allocated sites had continued to progress since the adoption of the LDP in December 2014.

3.3.8 The ELR set out an annual / interim monitoring target for employment land provision, specifying that 25% (or 27.78 hectares out of the total 111.13 hectares) of land allocated by Policy SP7 either attained planning permission or was available for development within the first two years of the LDP after the latter's adoption.

3.3.9 In just the single year covered by the first AMR (1/4/15 to 31/3/16), planning permission was granted for 4.99 hectares of the employment land allocated within the LDP. This comprised the following:

- 1.63 hectares at Delta Lakes (part of Growth Area 2 in Llanelli);
- 2.35 hectares at Cross Hands West Food Park (part of Growth Area 3 in Ammanford and Cross Hands);
- 0.35 hectares at Capel Hendre Industrial Estate (part of Growth Area 3);
- 0.25 hectares at Beechwood Industrial Estate (part of the Tier 2 area near Llandeilo);
- 0.41 hectares on land adjacent to the A40 (part of the Tier 2 area near St Clears).

3.3.10 As well as planning permission being granted for the areas of land above, 19.94 hectares of land also gained permissions (or was developed) in the period prior to the first AMR. This included the following:

- 13.63 hectares across various sites in the Cross Hands Growth Area (GA3);

- 1.11 hectares at the Capel Hendre Industrial Estate (part of GA3);
- 0.34 hectares at Heol Ddu, Tycroes (part of GA3);
- 3.28 hectares at Dyfatty (Tier 2 area around Burry Port);
- 0.74 hectares (combined) in the Tier 2 area near St Clears;
- 0.84 hectares (combined) in the Tier 2 area near Whitland.

3.3.11 Taking all of the above, the total amount of permitted and/or developed land is 24.93 hectares. This meant that up to and including the first AMR, almost 90% of the annual / interim monitoring target for the first two years of the adopted LDP had been met. It is important to caveat this, however, and to note that some of this 90% is still effectively providing the employment land supply going forward (at sites such as Dyfatty, Cross Hands and Capel Hendre). The 90% refers to planning permissions, for example, rather than delivery of actual employment creating buildings on these sites to date.

3.4 SECOND LDP ANNUAL MONITORING REPORT (AMR) (1 APRIL 2016 – 31 MARCH 2017)

3.4.1 For the work undertaken as part of the second AMR (due to be published in October 2017), further land received planning permission for employment activities. This totalled 2.42 hectares. Combining this figure with the total 24.93 hectares identified in Section 3.3, the revised total amount of land developed or with planning permissions is 27.35 hectares.

3.4.2 This means that 98% of the monitoring target set out in the LDP has already been achieved.

3.5 CONCLUSIONS

3.5.1 The take-up of employment land in recent years (in terms of both actual development and permissions granted) has demonstrated the importance of ensuring that sufficient areas of land are supplied for this purpose.

3.5.2 This is particularly the case for new sites located outside of the higher tiers of the land use hierarchy as these can make a significant contribution to the settlements and communities they serve. In rural areas, for example, opportunities for new businesses to establish themselves would be severely constrained in the absence of appropriate sites and premises.

3.5.3 The rate of take-up of the amount of employment land supplied is also justification of the revised allocation in the December 2014 LDP. The Employment Land Supply (ELS) work undertaken in 2010 produced a figure of 34.1 hectares, for example. Based on the analysis undertaken in the Employment Land Update Paper of June 2013, the employment land allocation in the LDP was revised to 111.13 hectares.

3.5.4 If the current rate of permissions and development continues, even the revised (higher) total will be reached in a few years' time. This will mean that for the county to achieve its growth driven employment objectives and forecasts, the supply of suitable land must continue well into the future. This is addressed in more detail in Chapter 4.

4 FUTURE REQUIREMENTS FOR EMPLOYMENT SPACE

4.1 INTRODUCTION

The estimates of future employment space requirements are based on 1) a comprehensive review of employment by priority sector in Carmarthenshire (and how this will change over time under different growth scenarios) and 2) adherence to the guidance used to calculate employment land requirements.

The three growth scenarios are as follows:

- Baseline growth: “steady state” growth;
- Medium growth: a Central Case in between Baseline and the “Growth Driven” scenario; and
- “Growth driven”: takes into account the more dynamic and ‘high value’ sectors in Carmarthenshire’s economy.

The overall approach adopted is described below.

4.2 DATA SOURCES

4.2.1 A major part of the exercise was the collation of all relevant data and statistics to be used in the forecasting process. The range of sources was extensive and comprised a mixture of nationally (UK) published statistics, data from Wales and ‘local’ data from Carmarthenshire. These include:

- ONS NOMIS data on historical employment in Carmarthenshire (between 2004 and 2016);
- Priority Sector Employment Data from the Welsh Government (between 2006 and 2015);
- Where relevant, data from the December 2014 LDP, the 2016 ELR and the AMR data;
- Transformations – a Strategic Regeneration Plan for Carmarthenshire 2015-2030; and
- Various parameters from the guidance document(s).

4.3 DATABASE AND FORECASTING MODEL

4.3.1 The land requirement forecasts have been developed from a database that contains the following:

- A series of historical data covering employment trends (by sector) in Carmarthenshire in the recent past – this helps inform the employment forecasts going forward;
- Allocation of the nine priority employment sectors to a land use category (predominantly B1 “office” and B2 “industrial”);
- Forecasts of annual employment change (growth) between a) 2017 and 2032 (15 year time horizon and b) 2017 and 2037 (20 year time horizon); and
- Incorporation of key input parameters, including land density assumptions (e.g. square feet per FTE) and ‘plot ratio’ assumptions (e.g. square feet per hectare).

4.3.2 The database (and forecasting model) has been developed with the functionality to test a number of different scenarios. With respect to sectoral employment, the sectors identified are the nine 'priority sectors' identified by the Welsh Government[1]. These are:

- Advanced materials and manufacturing;
- Construction;
- Creative industries;
- Energy and environment;
- Food and farming;
- Financial and professional services;
- Information and communications technologies (ICT);
- Life sciences; and
- Tourism.

4.3.3 All of these are relevant to the growth-driven objectives in Carmarthenshire, especially certain sectors such as the creative industries given the proposals for the 'creative cluster' at Yr Egin in Carmarthen, the various digital sector proposals throughout the SBCR and the major life sciences proposals planned near Llanelli.

4.3.4 The employment totals for all these sectors between 2006 and 2015 is entered into the database as 'base' information with the forecasts going forwards (e.g. from 2016 and 2017) pivoting off this information.

4.4 METHODOLOGY

4.4.1 The methodology adopted utilises existing guidance such as that in Chapter 7 of "Economic Development of Planning Policy Wales". Given the focus on Carmarthenshire's growth driven employment objectives, the primary focus has been on B1 and B2 employment categories as these feature predominantly in the nine priority sectors.

4.4.2 On a step-by-step basis, the following methodology was used:

- In the first instance, it was important at the outset to understand and replicate the method used in the 2010 Employment Land Study (ELS) – this was to understand that way in which the guidance had been used to drive the final results (with use of the "plot ratios" provided in the guidance – i.e. the amount of square metres of employment space per hectare);
- The "base" position with respect to employment totals per sector in 2017 (these are based on observed county-wide employment between 2015 and 2016 – this was just over 4% - and a working assumption of 2.5% growth between 2016 and 2017);
- Calculation of sectoral employment growth over two time horizons: 2017 to 2032 (15 years) and 2017 to 2037 (20 years). The forecasting model can test different annual growth assumptions with the standard annual growth assumption being 2.5%;

[1] "Priority Sector Statistics, 2016 (Sub-Wales) - New GVA data 2014" - the tables in this workbook are part of the Priority Sector Statistics, 2016 Statistical Bulletin published on 26th May 2016 (the tables show statistics on the Welsh Government's Priority Sectors. These are finalised and are available for SIC2007)

- Based on the additional employment generated over these two time horizons, these are converted into a requirement measured in square feet (using standard employment density parameters);
- The requirements expressed in square feet are then converted into hectares by application of thet plot ratio of 40% (or 4,000 square metres of floorspace per hectare of site area). This is the standard value given in *"Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan"* and can be adjusted for testing purposes.

4.4.3 The results are available for each priority employment sector and can be added together to give the total requirement across Carmarthenshire.

4.5 FORECASTS

4.5.1 The results of the sectoral analysis are shown in Table 4-1 below. These cover employee numbers and are presented for both the 2017 – 2032 (15 years) and 2017 – 2037 (20 years) time horizons. The results are shown according to a) additional employment over the time horizons, b) requirements by square feet and c) requirements expressed in hectares. The 'totals' in the final column (the total number of hectares, for example) refer to additional employment land over the specified time horizons.

4.5.2 As well as the headline numbers of jobs in each sector, it is also important to acknowledge that certain sectors will be generating significant number of 'valued added' jobs in the priority sectors. This is particularly the case for the estimated 2,500 Life Science jobs as these are likely to generate significant amounts of additional economic wealth locally compared to jobs in more traditional sectors such as construction.

Table 4-1 Results

CATEGORY	PRIORITY SECTOR 1	PRIORITY SECTOR 2	PRIORITY SECTOR 3	PRIORITY SECTOR 4	PRIORITY SECTOR 5
	Advanced materials / manufacturing	Construction	Creative Industries	Energy and Environment	Food and Farming
Employment					
2017-2032 change	2,032	2,931	743	3,205	2,345
2017-2037 change	2,895	4,176	1,058	4,565	3,341
Square Feet					
2017-2032 change	63,004	90,871	13,367	99,352	72,696
2017-2037 change	89,751	129,448	19,041	141,530	103,559
Hectares					
2017-2032 change	16	23	3	25	18
2017-2037 change	22	32	5	35	26

CATEGORY	PRIORITY SECTOR 6	PRIORITY SECTOR 7	PRIORITY SECTOR 8	PRIORITY SECTOR 9	TOTALS
	Financial and Professional	ICT	Life Sciences	Tourism[2]	
Employment					
2017-2032 change	1,915	430	2,500	2,580	**18,681**
2017-2037 change	2,728	612	2,500	3,675	**25,550**
Square Feet					
2017-2032 change	34,472	7,739	45,000	79,966	**506,466**
2017-2037 change	49,107	11,024	45,000	113,914	**702,374**
Hectares					
2017-2032 change	9	2	11	20	**127**
2017-2037 change	12	3	11	28	**176**

[2] Whilst it is acknowledged that tourism enterprises will require the estimated amount of new land, tourism-related enterprises often do not fall within B use classes. Consequently, a smaller area of land for such uses is likely to be required on LDP employment allocations as tourism-related proposals lend themselves to a variety of different locations, and are determined in accordance with planning policy.

4.6 CONCLUSIONS

4.6.1 As shown in Table 4-1, anticipated growth in employment in key sectors (especially those in Carmarthenshire's growth driven sectors such as the creative industries and life sciences) will mean that a continued supply of appropriate employment land will be needed.

4.6.2 If Carmarthenshire is to succeed in meeting its economic and development objectives, this supply of employment land therefore becomes crucial as several of the sectors where growth is anticipated can only thrive if sufficient land becomes available. Examples would be in and around Carmarthen as the Yr Egin-based creative and digital cluster develops as well as near Llanelli where employment in life sciences will expand considerably in the coming years. Another key site is the Cross Hands Growth Zone and the various 'high value' sectors being targeted at this site.

4.6.3 The 'balance' between the current supply of employment land and demand is explored in more detail in Chapter 5.

5 DEMAND/SUPPLY BALANCE

5.1 INTRODUCTION

5.1.1 This chapter explores the balance between the current supply of employment land in Carmarthenshire and the likely demand for employment land going forwards (including the time horizon of the next Local Development Plan).

5.2 CURRENT TRENDS

5.2.1 As described in Chapter 3, the evidence collated in recent years (up to the end of the most recent AMR period on 31st March 2017) has shown that “take up” of land allocated for employment has matched the anticipated monitoring targets. “Take up” refers to allocated sites that have been developed and/or those that have a valid planning permission for an employment use.

5.2.2 This is evident from permissions and actual developments across the different Growth Areas with particularly strong take-up of employment land at the various Cross Hands sites in Growth Area 3. There has also been new employment development across the Tier 3 towns and areas. The latter is a clear demonstration of how employment land is needed in areas away from the main population settlements in Carmarthenshire.

5.2.3 With 111.13 hectares of land identified in the December 2014 LDP, the rate of take-up of this is such that if recent trends continue, the supply of employment land will be exhausted in a few years’ time (probably well within the next decade). This is based on recently observed annual take-up rates and includes 1) various developments being built on allocated sites, 2) the projected growth rates and 3) the likely increases in development expected through the recently signed City Region deal.

5.2.4 With Carmarthenshire aiming to diversify its economy into several sectors such as the creative industries and life sciences, provision of land in key areas is thus imperative. This also fits with the objectives in the recently signed SBCR City Deal where developments in key sectors will be critical to the success of the regional economy.

5.2.5 Another factor that has emerged recently is the limited availability of employment land whether or not the land is owned by the Council. This outcome was based on an exercise whereby the Council looked for opportunities to develop sites for employment use with an emphasis on the more rural areas of Carmarthenshire[3].

5.2.6 This exercise addressed the shortage of employment land in the towns and settlements to allow for local employment provision. If more employment land is made available in the towns and settlements, this will serve the purpose of providing more choice to developers (and should not therefore be viewed as simply an oversupply of land overall). This policy of offering more choice also aligns with the policies set out in the LDP.

5.2.7 An alternative to this approach would be to restrict employment land to key areas and to improve transport access to these sites. With the focus being on the key sectors, these will benefit from the clustering effects discussed earlier in this report.

5.2.8 For deliverability purposes, the focus was on land in the Council’s ownership although other land could be considered. Based on analysis of 21 towns and settlements in Carmarthenshire, the outcome was that relatively little potential employment land is available at the present time.

5.2.9 The 21 locations selected did not include the main centres of population at Carmarthen, Llanelli and Ammanford as the focus was on non-urbanised areas. The findings of the exercise again reinforce the point that Carmarthenshire needs to ensure that sufficient new employment land is forthcoming if the strategic economic objectives are to be met.

5.2.10 The main conclusion from the “supply versus demand” analysis is that although take-up of allocated employment land remains on target for the current LDP period, there is a real risk that this will be used up well before the end of the next LDP and as the analysis in Chapter 4 has shown, employment growth in key sectors will require that land continues to be made available well into the future.

5.3 ECONOMIC CONSEQUENCES

5.3.1 Carmarthenshire is undergoing a period of significant economic change and diversification. With the SBCR City Deal now signed and key developments such as Yr Egin in Carmarthen now under construction, the need to provide sufficient employment land to meet demand going forwards will be essential.

5.3.2 The economic consequences of not providing sufficient land (in the correct locations) will severely hamper these objectives and are likely to mean that the region loses out to other parts of Wales (and the UK) if these other areas are successful in providing enough employment land to meet their economic targets.

5.3.3 This is particularly relevant in today’s economy where clustering of businesses is becoming increasingly important for economic development. A good example is Yr Egin in Carmarthen where the new base for S4C and other media companies will act as a catalyst for other developments in the area, including those in the digital sector. Without sufficient land being made available for these developments, the growth driven objectives in the County will not be fully achieved.

5.3.4 The same principle applies near Llanelli where sufficient land needs to be available for the developments in the life sciences sector to take place. Carmarthenshire’s reliance on small and ‘micro’ businesses also means that employment land needs to be provided across a large swathe of the County so that there is enough flexibility in the market for these small firms to set up (if new), expand (if existing) and flourish.

5.3.5 A suitable amount of employment land will be required as a greater choice of sites will accommodate the varying needs of businesses and will reflect the rural nature of parts of the County as well as the need for accessible sites (with reasonable transport links).

[3] The Corporate Property team at Carmarthenshire County Council were asked by an Executive Board Member at the Council to look for opportunities to develop sites for employment use with an emphasis on the more rural areas of the county. For deliverability purposes, the focus was on land in the Council’s ownership (although other land could be considered)

6 POLICY AND DELIVERY IMPLICATIONS

6.1 INTRODUCTION

6.1.1 This chapter consider policy and other measures that will be required to support the existing site portfolio and to meet future business needs in Carmarthenshire. The 'actions' shown below are those that have been discussed and agreed with the County Council following the earlier iterations of this report and its findings.

6.2 ACTIONS

6.2.1 The following actions are recommended:

- Initiate a proactive land acquisition programme of employment sites across the county – an alternative would be a Joint Venture (JV) with key partners in the public and / or private sectors;
- Establish a Property Development Fund to enable private sector delivery so that this can bridge the gaps between project cost and project value. This can be either an in-house fund or can comprise an effective lobbying campaign to obtain Welsh Government support for funding;
- Work with utilities to ensure the County's and region's economic growth aspirations are highlighted and incorporated in their Asset Management Programmes (AMPs);
- Recognition of the role of Property Development Fund (PDF) assistance through appropriate programme development and guidelines;
- Ensure that infrastructure, including the practicality and applicability of utilities, and biodiversity aspects are considered upfront when selecting additional sites for employment use;
- Once the location of concentrations of activity ("clusters") are identified, work closely with transport providers, utility companies, National Resources Wales (NRW) and land owners to identify suitable sites. This collaborative approach will be more cost effective to develop and is referred to in the recent UK Industrial Strategy. The Strategy refers, for example, to local councils' choices about where to encourage development and where these possibilities are constrained by a lack of resources to build roads, install utilities and undertake other works to make sites viable. The recently signed City Deal should also enable a more cohesive, 'joined up' approach to planning infrastructure; and
- Ensure there are sufficient and effective intervention procedures in place so that more suitable sites for employment uses become available. These interventions will have an important role to play in cases where land owners may have other aspirations for their sites, especially where these could generate a high financial / commercial return.

6.2.2 There will also be a requirement to ensure that the employment land is delivering a sufficient density of employment to 1) reduce land take and 2) make as efficient and as sustainable use of resources as possible.

6.2.3 In addition, it will be important to ensure that previously used land and buildings are prioritised.

6.3 ADDITIONAL POLICY AND DELIVERY OBJECTIVES

6.3.1 There are a number of other important policy implications derived from this work and these are summarised below:

- Whilst there is a clear, justifiable requirement to focus on the growth driven sectors in the local economy (such as life sciences), it is also important to consider employment in traditional sectors and industries, such as manufacturing industry – these more traditional sectors will continue to play a major role in Carmarthenshire's economy. Suitable provision of employment land for these sectors will need to be considered;
- Although B1 land use allocation will be appropriate for the growth sectors in the local economy, traditional industries may still require separate allocations in some geographical areas. This will ensure that full use is made of B1 and all B2 allocations (so that the land uses associated with traditional industries) are not marginalised;
- It is also important to highlight that if most of Carmarthenshire's strategic sites are dedicated to the digital, life sciences and creative industries, there will be restricted supply to meet the demand for traditional industries in some key areas of the county; and
- The growth in the new, high value sectors will also indirectly increase the demand for supporting traditional industries. This therefore adds to the case for more B2 land use allocation and there are clear supply deficits in the main urban areas of Llanelli, Carmarthen and Ammanford and also in the three rural areas of the Tywi, Taf and Teifi valleys.

7 CONCLUSIONS

7.1 KEY CONCLUSIONS

7.1.1 Carmarthenshire is currently undergoing a significant transformation in economic activity with several new sectors coming to the fore and continuing the process of replacing some of the more traditional industries associated with the County's economy in the past.

7.1.2 Carmarthenshire is a core part of the Swansea Bay City Region (SBCR) and several of the Region's economic objectives are specifically targeted at the County. These include the digital sector as well as creative industries and life sciences.

7.1.3 With employment in these sectors requiring key skills and providing good, well paid job opportunities to people in Carmarthenshire, there is great potential to raise not only economic activity but also productivity and living standards in the County.

7.1.4 With out-flows of young people from Carmarthenshire still apparent (primarily so that they can find work opportunities elsewhere), the potential to develop local employment in the County is of paramount importance and will have the added benefit of allowing Carmarthenshire to retain use of the Welsh language. Developments such as those at Yr Egin will help the latter, for example.

7.1.5 Although a substantial amount of land was allocated to new employment use in the 2014 Local Development Plan (LDP), the extent to which this has been taken up in recent years – both through planning permissions and actual development – means that without a renewed supply of additional employment land in the following LDP period, the full potential for employment will be severely constrained.

7.1.6 A recent audit of employment land availability in key areas in Carmarthenshire (such as Ammanford North and South, Laugharne, Llandovery, Llanelli North, Newcastle Emlyn, St Clears and Whitland) shows that there is relatively little land currently available in these areas. This again supports the main conclusion that it is imperative that additional employment land is forthcoming in the new LDP period.

7.1.7 Provision of employment land is also essential given that some of the priority sectors such as life sciences are effectively starting from a very low employment base and will require sufficient quantities of land if they are to develop successfully and deliver their full potential.

7.2 RECOMMENDATIONS

7.2.1 The recommendations largely follow the various actions and strategy objectives set out in Sections 6.2 and 6.3 respectively (in Chapter 6). These are summarised below:

- Develop a proactive land acquisition programme of employment sites – proactive interventions at an appropriate stage will also help in situations where existing land owners may be inclined to develop land on purely commercial grounds (rather than for specific employment purposes);
- Establish a Property Development Fund (to facilitate private sector delivery);
- Work with utility providers to ensure that the land use allocations align with their Asset Management Programmes;
- Infrastructure considerations need to be taken into account prior to enacting land use allocations;

- Once clusters / concentrations of activity have been identified, work closely with various transport and utility providers (as well as other relevant) to put in place optimal solutions – the recently signed City Deal should also help facilitate this;
- Ensure that the required employment densities are achievable at each allocated employment land use (and make efficient / sustainable use of resources).
- Ensure that previously used land and buildings are given priority; and
- As well as the focus on the growth sectors, ensure that sufficient land is allocation to traditional sectors (e.g. also ensure that B2 land use is not 'marginalised').

7.2.2 There is thus a clear case for targeted interventions and actions to help with optimising the supply of employment land. Without such interventions, reliance on 'market forces' alone is unlikely to enable Carmarthenshire to achieve its employment objectives. This is particularly the case for clusters of high value growth businesses where the supply of employment land needs to be accompanied by appropriate infrastructure such as utilities and good transport access.

SOURCES

- Carmarthenshire County Council (2010). Employment Land Study. Final Report.

  http://planning.carmarthenshire.gov.uk/AnitePublicDocs/53325663.pdf
- Carmarthenshire County Council (2014). Carmarthenshire Local Development Plan.

  http://www.carmarthenshire.gov.wales/media/549379/HRA-Vol-1-Main-text-27Nov14.pdf#
- Welsh Government (2016). Chapter 7 Economic Development. Planning Policy Wales.

  http://gov.wales/docs/desh/publications/161117ppw-chapter-7-en.pdf
- Welsh Government (2014). Technical Advice Note 23.

  http://gov.wales/docs/desh/policy/140207tan-23-economic-development-en.pdf
- Carmarthenshire County Council (2016). Employment Land Review 2016.

  http://www.carmarthenshire.gov.wales/media/1644493/Employment-Land-Review-ELR-Report-2016-COMPLETE-English.pdf
- Welsh Government (2015). Practice Guidance – Building an Economic Development Evidence Base to Support a Local Development Plan.

  http://gov.wales/docs/desh/publications/150925building-an-economic-development-evidence-base-en.pdf
- Swansea Government (2013). Swansea Bay City Region Economic Regeneration Strategy 2013-2030

  http://www.swansea.gov.uk/article/8061/Swansea-Bay-City-Region-Economic-Regeneration-Strategy
- Welsh Government (2016). Regional Employment & Skills Plan. South West and Mid Wales.

  http://www.rlp.org.uk/regional-delivery-plan/
- Carmarthenshire County Council (2015). A Strategic Regeneration Plan for Carmarthenshire 2015-2030 – Transformations.

  http://www.carmarthenshire.gov.wales/media/1257505/Transdoc_Englishonly_webversion.pdf