

OCTOBER 2019

Two County Economic Study for Carmarthenshire and Pembrokeshire

Interventions & Strategic Sites Summary Report



ARUP

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Introduction

OVERVIEW

The Two County Economic Study for Carmarthenshire and Pembrokeshire has been prepared by Ove Arup and Partners Ltd on behalf of Carmarthenshire and Pembrokeshire County Councils, and the portions of the Brecon Beacons and Pembrokeshire Coast National Parks within the ‘Two County’ area.

The purpose of the Two County Economic Study is to:

- Serve as an ‘larger-than-local’ evidence base for the Local Development Plan process and provide regional context for the National Parks;
- Respond to the requirements of Technical Advice, Guidance and Policy whilst placing a strong emphasis on flexibility, realism of sector growth and ability to meet demand at a regional scale;
- Undertake quantitative analysis of forecast demand for employment sites, supplemented with anecdotal evidence arising from both engagement and contextual messages;
- Advise on economic and site-specific interventions; and
- Collate information on Strategic Sites within the Study area.

For access to other Local Development Plan Review evidence base documents, please visit:

Pembrokeshire: <https://www.pembrokeshire.gov.uk/local-development-plan-review/ldp2-evidence-base>

Carmarthenshire: <https://www.carmarthenshire.gov.wales/home/council-services/planning/local-development-plan-2018-2033/development-of-an-evidence-base/#.XcwOBVf7RaQ>

The study therefore looked in detail at the current economic environment and drivers for change within existing interventions and strategies.

WORKING TOGETHER TO PROMOTE SITES AND DRIVE INTERVENTIONS

There is a greater focus through the National Development Framework on working collaboratively to deliver economic growth and sustainable development outcomes. Using the interventions and sites emerging from Carmarthenshire and Pembrokeshire County Councils, the authorities have chosen to work together to sustain regional working, collaborate with existing and indigenous businesses and promote a portfolio of strategic sites.

THE LARGER THAN LOCAL CONTEXT

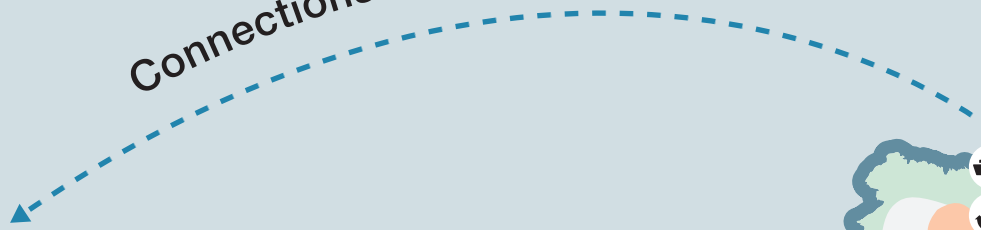
The Larger than Local area is a diverse area known for its rich natural environment which provides a strong draw for its residents and visitors, as well as providing some unique assets which have historically attracted a number of key sectors to the area. Current forecasts show an ageing population across the Larger than Local area with out-migration of the younger population and in-migration of older people and retirees. The area benefits from a number of existing economic interventions including the Swansea Bay City Deal and Enterprise Zones.

The local and regional economy of the area is characterised by a number of key sectors, including agriculture, tourism, the public sector and manufacturing. Forecast data suggests a changing structure of this economy with a general trend of growth in employment across sectors such as tourism and decline in employment in sectors such as manufacturing and retail. It is important to note however, that such declines will not necessarily lead to a reduced demand for land and premises as efficiency changes and automation may be driving forecast employment decline.

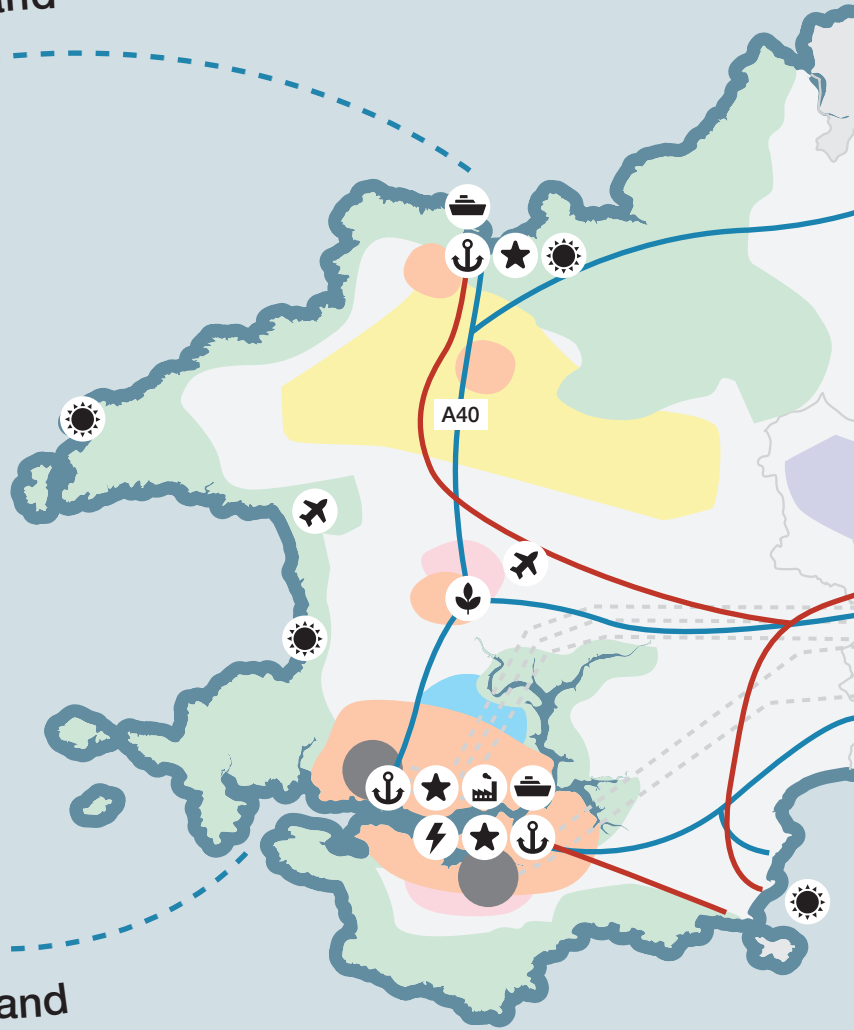
Given the areas rurality, the Larger than Local area does suffer with an end-value gap, making investment decisions more difficult and leading to a requirement for grant funding, public sector intervention or larger capital investment from the private sector. Positively, the work has found a strong Welsh brand and a number of key employers who identify with the area and wish to remain, bringing benefits to the economy within which they've established. 'Place' has therefore emerged as a key driver when considering the future of the Larger than Local area and retaining the current quality will be key for both existing employers and employees looking to locate in the area.

















The Larger than Local area should therefore focus on maximising its strengths and existing assets, whilst seeking solutions to work collaboratively to reduce or overcome the value gap which can be a restriction on development / investment. The area should seek protection of strategic assets in order that their benefit for the area can be maximised, alongside proactively planning for strategic sites where demand is high.

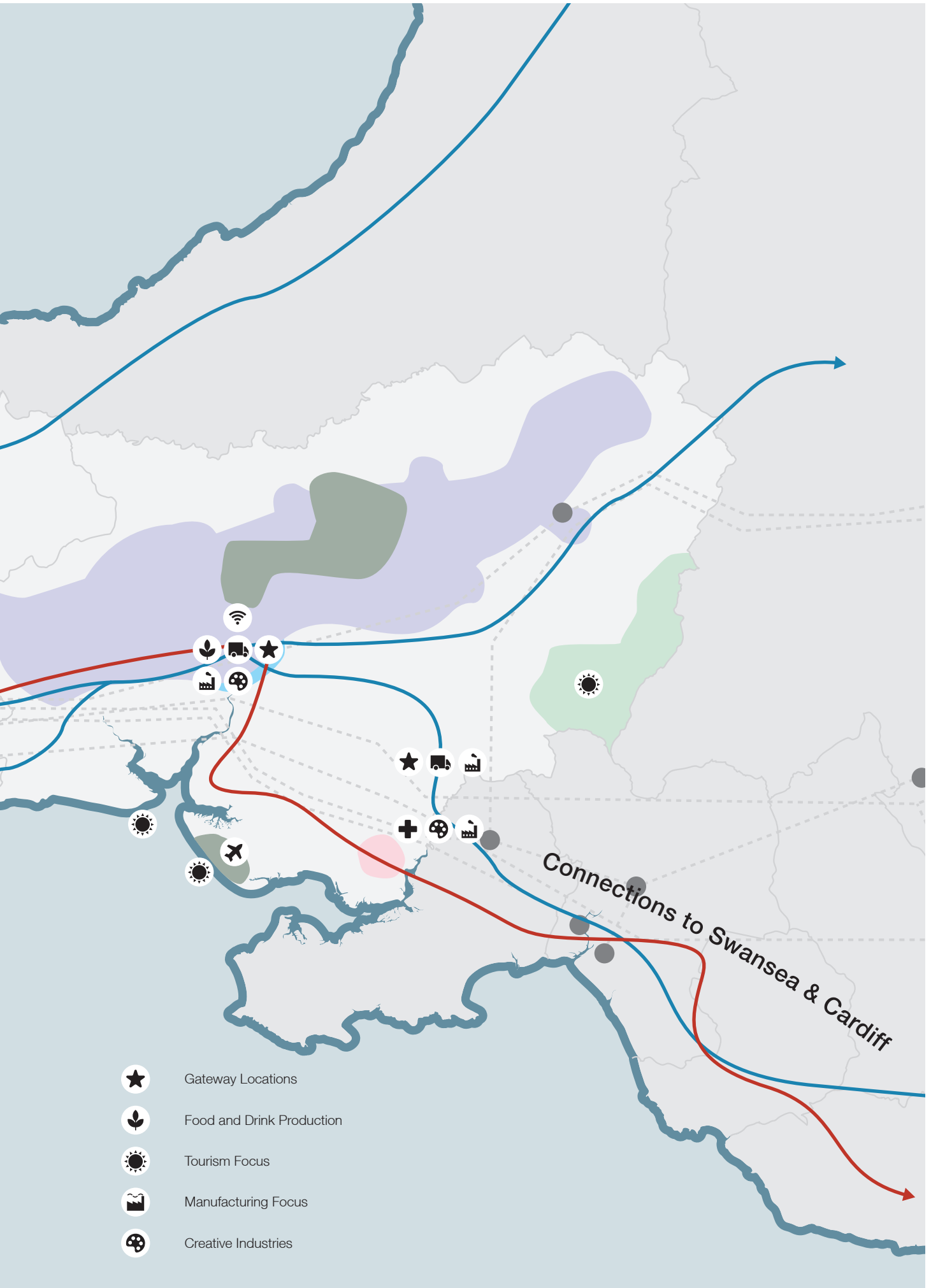
Connections to Ireland



Connections to Ireland



- | | | | | | |
|---|---------------------------------|---|---|---|---|
|  | National Park Boundaries |  | HGVs |  | Target Areas for SWW Regional Plan for Regeneration |
|  | Railway Line |  | Haven Waterway Enterprise Zone Sites |  | NDF Draft Solar and Wind Priority Area |
|  | Energy transmission / pipelines |  | Pembroke Dock Marine City Region Site |  | NDF Solar Priority Area |
|  | A-Roads and Motorway |  | Creative Digital Cluster Yr Egin City Region |  | NDF Regional Growth Areas |
|  | Airport |  | Life Science and Well-Being Village, Llanelli |  | NRW Forest Ownership |
|  | Port/Ferryport | | | | |



- ★ Gateway Locations
- 🌿 Food and Drink Production
- ☀️ Tourism Focus
- 🏭 Manufacturing Focus
- 🎮 Creative Industries

Connections to Swansea & Cardiff

Strategic Interventions

The following broad economic interventions have been developed and agreed with the Larger than Local authorities and they are committed to working collaboratively and collectively in driving actions associated with these interventions, as detailed below:

INV1

Making the most of complementary sectoral strengths by maximising natural resources and adding value;

INV2

Exploring options to respond to sectoral demand and support indigenous firms by increasing planning flexibility;

INV3

Exploring opportunities for working in partnership with the private sector to reduce reliance on public sector funding;

INV4

Proactively protecting assets / land which enables the strategic locational benefits of the Larger than Local area to be maximised;

INV5

Planning proactively for strategic, site-based interventions;

INV6

Reviewing the successes and challenges of existing spatial initiatives to ensure lessons-learned for newly-emerging concepts (such as the Port Zone);

INV7

Operating effectively across-authorities and across-departments;

INV8

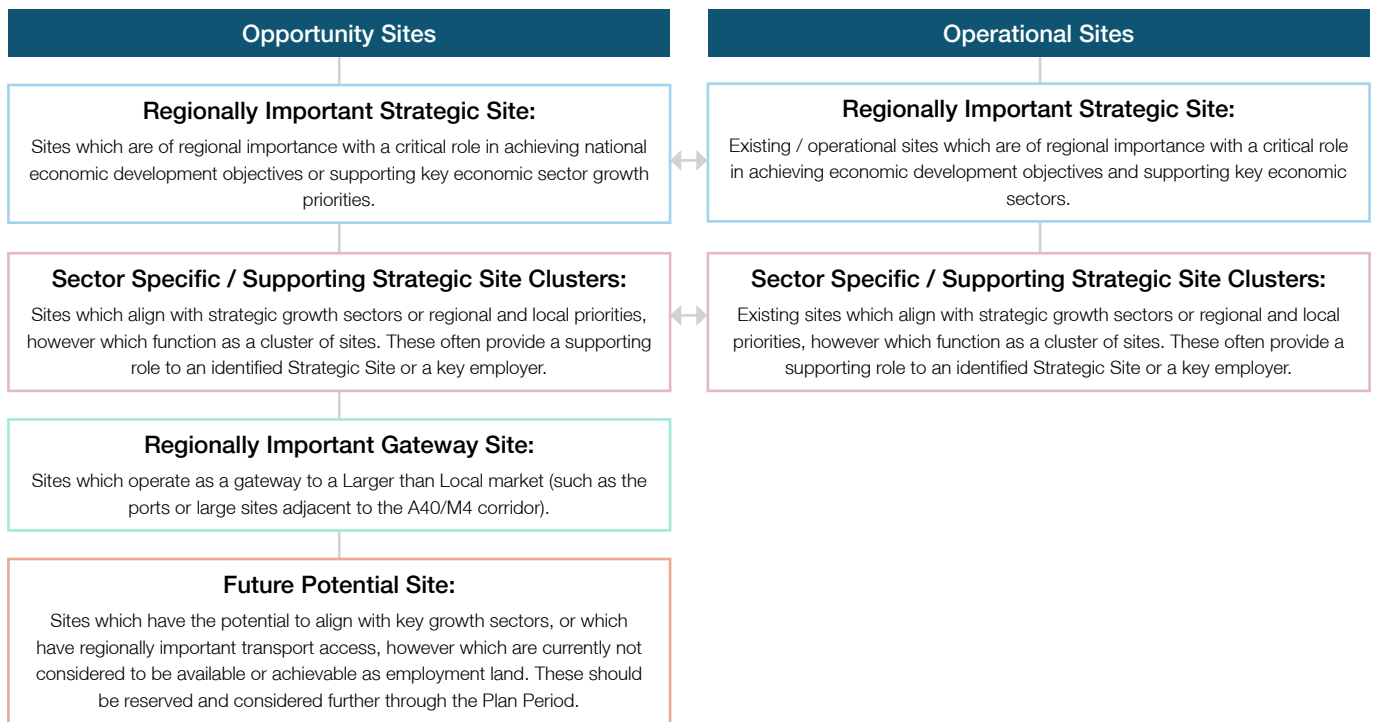
Strategically planning skills development and training to match current and future needs; and,

INV9

Ensuring the natural assets of the area are not undersold in future investment strategies, however ensuring place, connectivity and social infrastructure match the expectations of skilled-worker wanting to relocate into the area.

Going forward, the Larger than Local planning authorities are committed to developing, agreeing and maintaining a system of tracking these interventions, agreeing relevant performance indicators to demonstrate progress and considering these in both policy development and the assessment of applications.

Strategic Sites



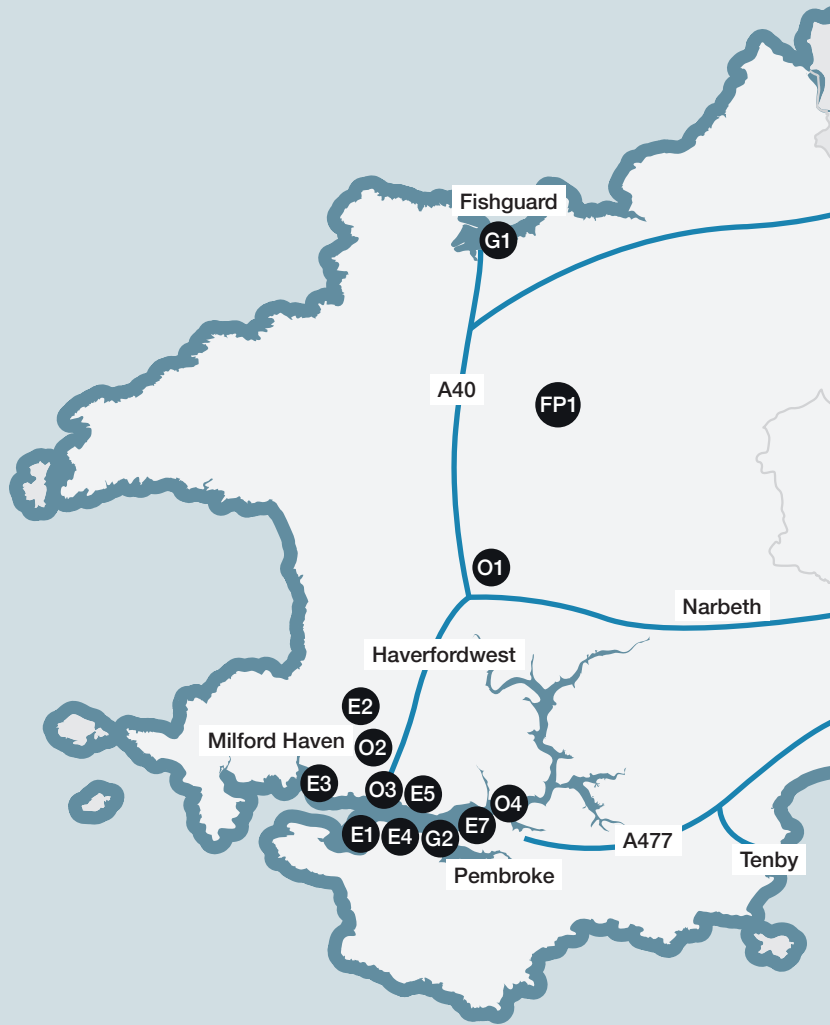
The Larger than Local area contains a strong indigenous employment base with market confidence and a willingness to remain, invest and grow. In addition, the area has a number of locational advantages and strategic assets which should form a focus for future growth and investment.

In recognition of the above, the study has identified a portfolio of strategic sites within the Larger than Local area which are considered to offer strategic benefits that should be protected (e.g. port or road connectivity), are current strategic sites with growth potential (e.g. Withybush) or have potential to play a role in wider economic development interventions (e.g. City Deal).

Each Strategic Site has been categorised using the hierarchy presented above.

Site Proformas for the Strategic Sites are included below.

- Fishguard and Goodwick Harbour Cluster
- Trecwn
- Withybush Cluster
- Milford Haven Oil Refinery (Puma Energy)
- South Hook LNG
- Thornton Industrial Estate Cluster
- Pembroke Dock Cluster
- Blackbridge
- Waterston (Dragon LNG)
- Pembroke Oil Refinery (Valero)
- Pembroke Power Station
- Pembroke Dock Cluster
- Pembroke Science and Technology Park Cluster
- Waterloo and London Road Industrial Estate
- Bynea, Llanelli
- Trostre, Llanelli
- Dafen, Llanelli
- Cross Hands
- Parc Hendre
- Life Science and Well-Being Village, Llanelli



FP1 Trecwn

G1 Fishguard & Goodwick Harbour Cluster

G2 Pembroke Dock Cluster

E1 Pembroke Oil Refinery

E2 Milford Haven Oil Refinery (Puma Energy)

E3 South Hook LNG

E4 Pembroke Power Station

E5 Waterston Energy

E6 Trostre, Llanelli

E7 Waterloo and London Road Industrial Estate

O1 Withybush Cluster

O2 Thornton Industrial Estate Cluster

O3 Blackbridge

O4 Pembroke Science and Technology Park Cluster

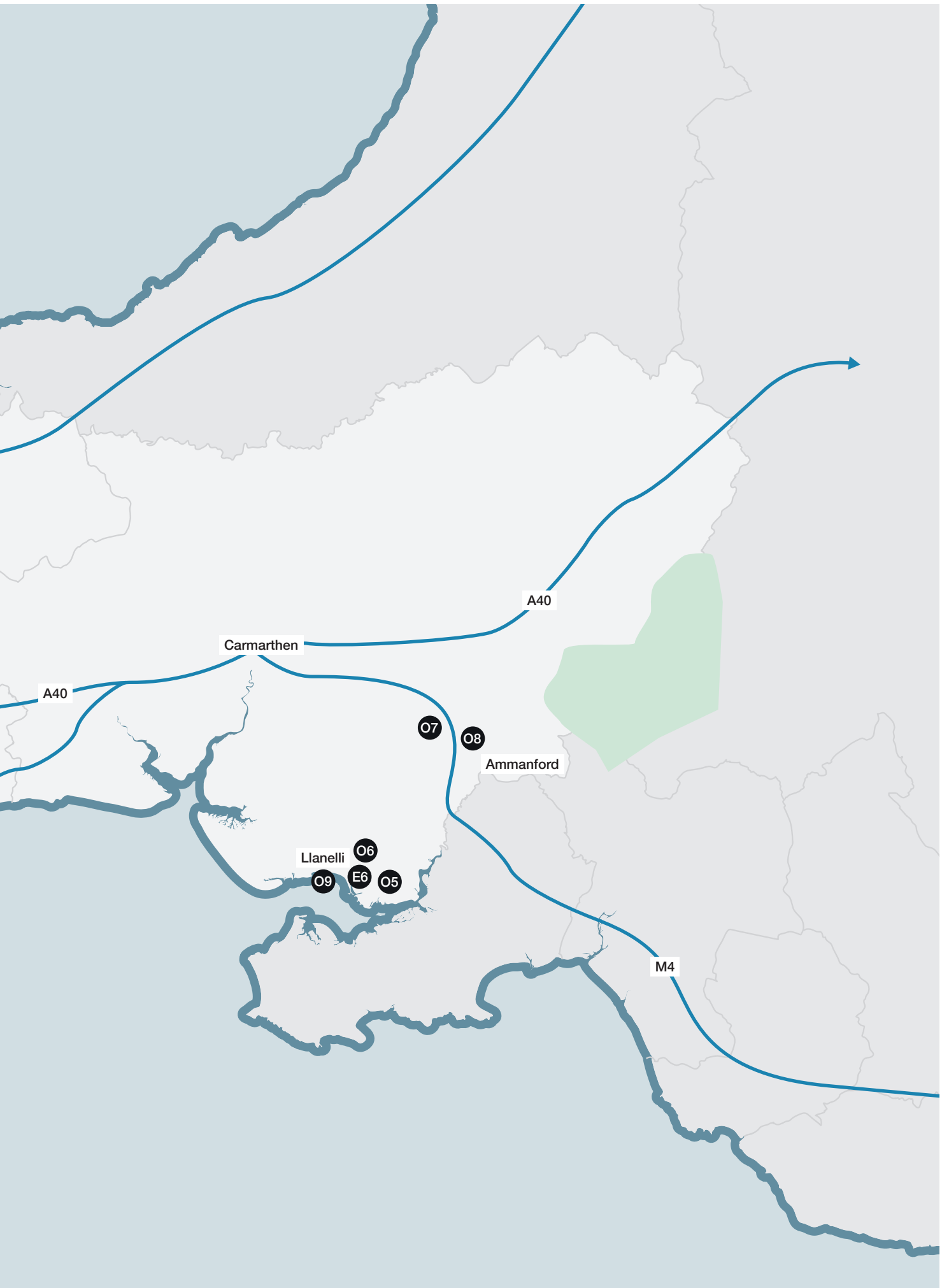
O5 Bynea, Llanelli

O6 Dafen, Llanelli

O7 Cross Hands

O8 Parc Hendre

O9 Life Science and Well-Being Village, Llanelli



Carmarthen

A40

A40

O7

O8

Ammanford

Llanelli

O6

O9

E6

O5

M4

Summary

OVERVIEW

Working within the broad interventions, the Larger than Local authorities are committed to supporting indigenous growth whilst working with partners to attract the right type of inward investment for the region.

Should you wish to discuss investment opportunities within the area please get in touch using the contact details below.

PEMBROKESHIRE COUNTY COUNCIL

Rachel Moxey, Head of Economic Development

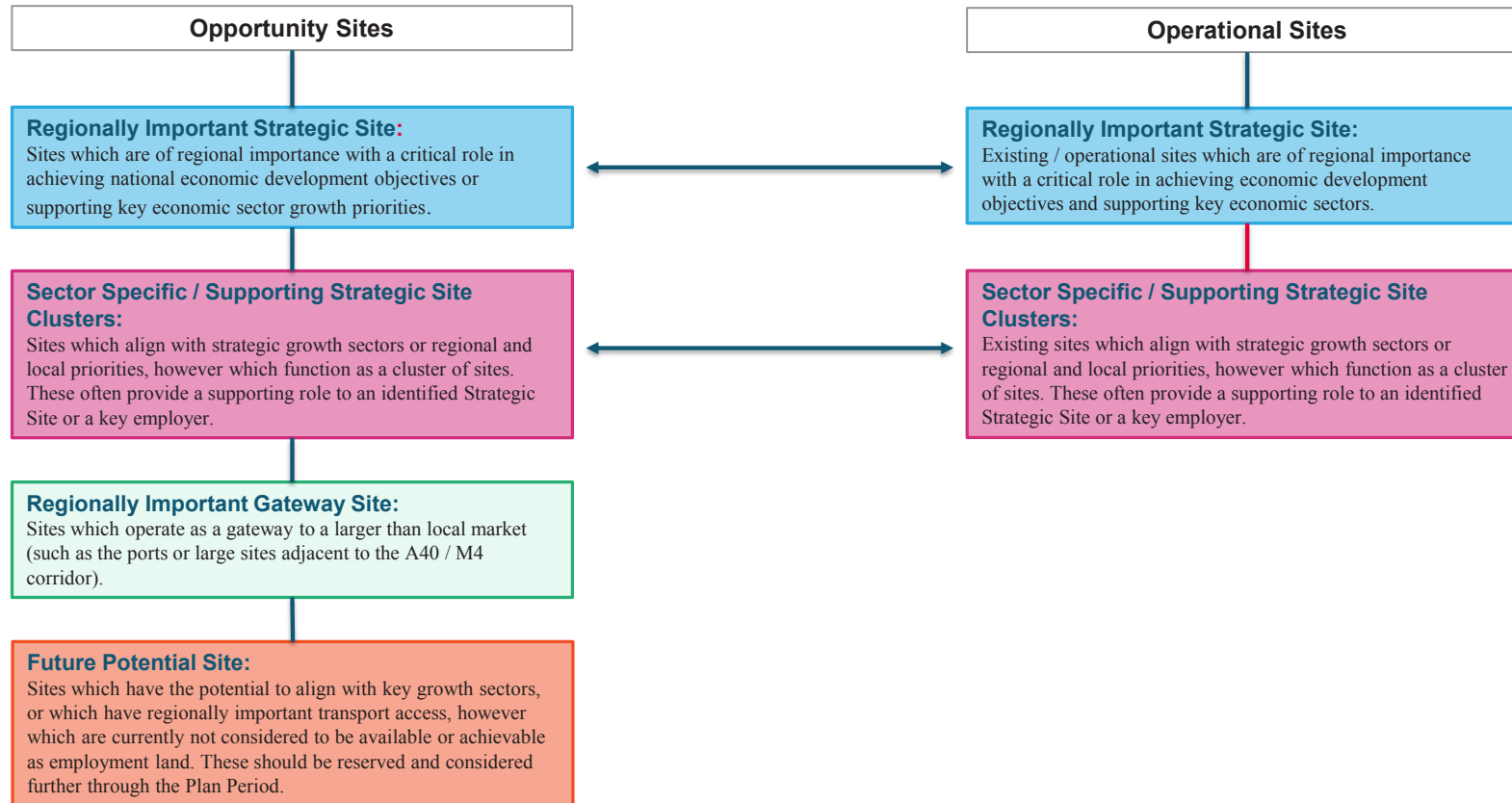
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CARMARTHENSHIRE COUNTY COUNCIL

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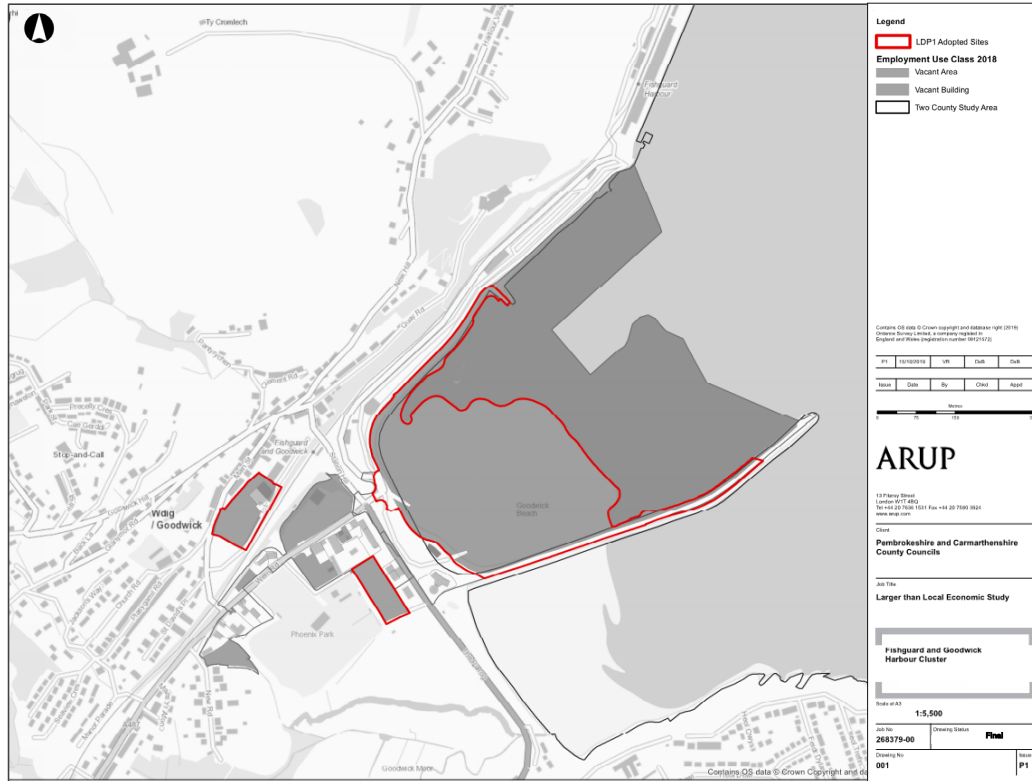
JaJones@carmarthenshire.gov.uk

A willingness of indigenous businesses to remain and grow, desire by stakeholders to preserve locational advantages and market confidence around a number of sectoral strengths, there is a broad rationale to continue to pursue the 'strategic opportunities' associated with locational advantages and current sectoral strengths.



Larger than Local Economic Study – Strategic Sites

G1. FISHGUARD AND GOODWICK HARBOUR CLUSTER



Name: Fishguard and Goodwick Harbour Cluster
Location: 194731 238213

Description: This cluster of sites has clear potential associated with the existing harbour uses. There are three sites currently allocated within LDP for sui generis and B8 uses, and sufficient space for re-development or expansion potential and supply-chain uses (albeit, the former Dewhirst Factory Site has recently received planning permission for residential units).

Sector Focus/Unique Characteristics:
 Ferry Port with direct access to Rosslare, Ireland. Potential for further supply chain uses linked to Port operations.

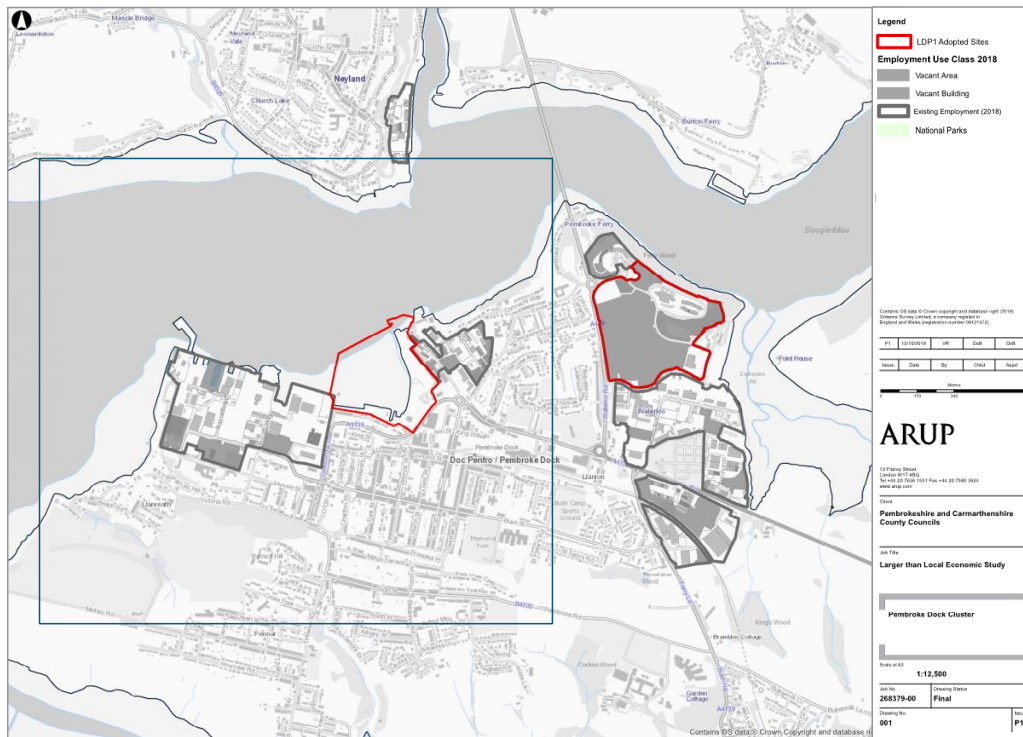
Evidence suggests an opportunity to develop the cruise sector which may lead to further infrastructure and land requirement.

Site Area:
 50.9ha

Most Relevant Broad Interventions: INV1, INV4, INV5
Site Interventions: Explore further the opportunity presented by cruise ships and consider supporting infrastructure and port-side site investment where needed.

Gateway Site

Sector-specific / Supporting Strategic Site Clusters



Name: Pembroke Dock Cluster

Location: 195881 203748

Description: Cluster of sites including the Royal Dockyard and West Llanion Business Park. The sites form part of the City Deal Project, Pembroke Dock Marine and whilst they contain some existing employment uses, are considered to offer further potential for strategic growth. The sites offer clear potential for port related development or employment uses that require access to the port (e.g. export).

Sector Focus/Unique Characteristics:

Ferry Port with direct access to Rosslare, Ireland. Focus on port related activities and industries and also marine energy activities being developed / deployed by a number of local businesses.

Evidence of greater export potential, although storage in close proximity to the site is limited.

Site Area:

>35.0ha

Most Relevant Broad Interventions: INV1, INV2, INV4, INV5

Site Interventions: Continued support through the City Deal programme and consideration of how surrounding sites could help facilitate port related function (e.g. storage for export / import of goods).

Gateway Site

Sector-specific / Supporting Strategic Site Clusters

Larger than Local Economic Study – Strategic Sites

E1. PEMBROKE OIL REFINERY (VALERO)



Name: Pembroke Oil Refinery (Valero)

Location: 195881 203748

Description: The site is currently an existing employment site occupied by Valero who are considered to be a strategic regional employer. The refinery is one of the largest in Western Europe and a key strategic asset for the UK energy sector.

Sector Focus/Unique Characteristics:

Site is considered to be a strategic employment site linked to the energy sector.

Strategic location and direct access to deep water.

Site Area:

218.5ha

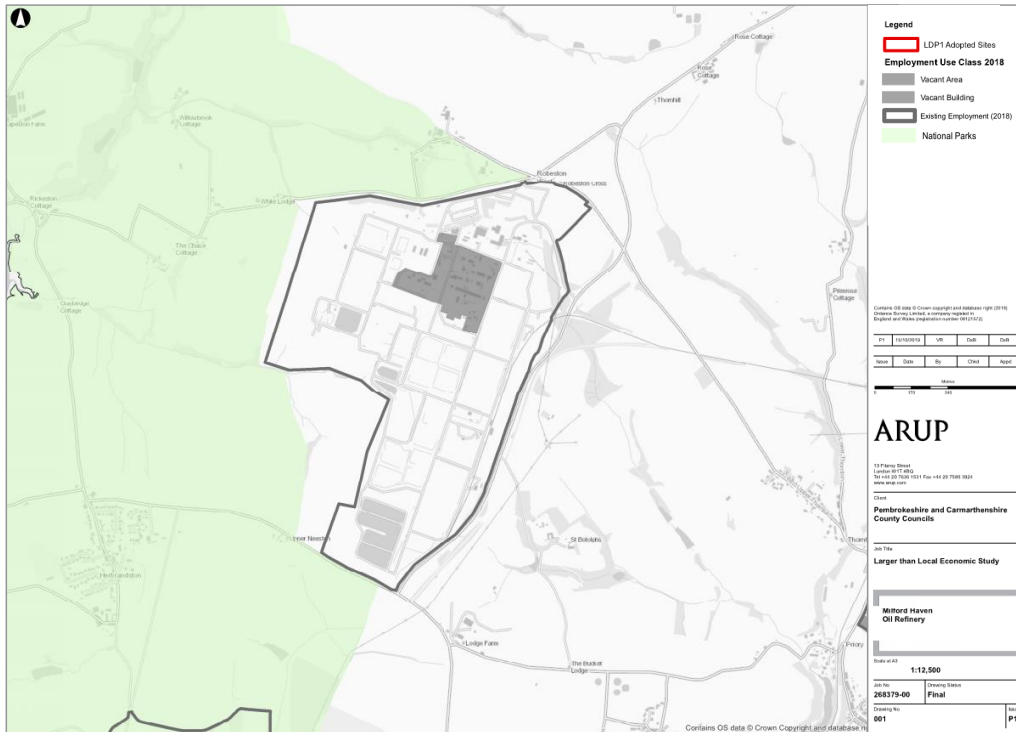
Most Relevant Broad Interventions: INV1, INV2, INV4, INV5

Site Interventions: Support existing employer through continued engagement and understanding of needs.

Regionally Important Strategic Site

Larger than Local Economic Study – Strategic Sites

E2. MILFORD HAVEN OIL REFINERY (PUMA ENERGY)



Name: Milford Haven Oil Refinery (Puma Energy)
Location: 188537 208596

Description: The site is currently an existing employment site occupied by Puma Energy who are considered to be a strategic regional employer. Engagement should continue to take place with landowner through the Local Plan process.

Site is within the Haven Waterway Enterprise Zone.

Sector Focus/Unique Characteristics:
 Proximity to deep water with existing bulk liquid pipeline connection.
 Existing rail head connection onto the site.

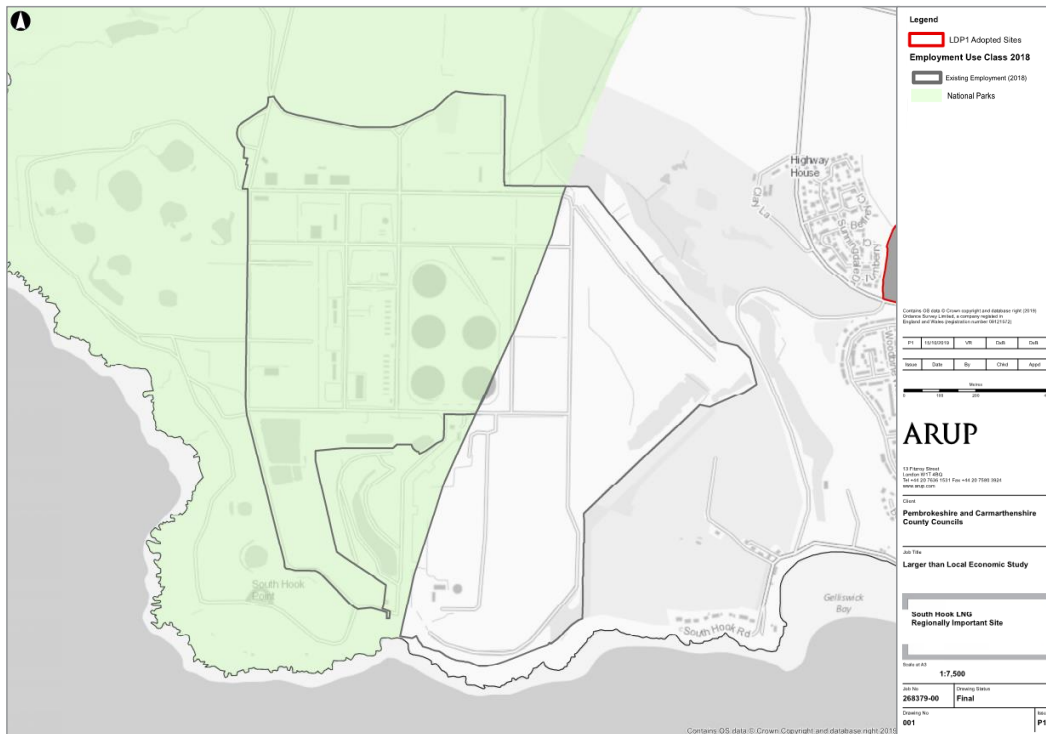
Site Area:
 148.2ha

Most Relevant Broad Interventions: INV1, INV2, INV4, INV5
Site Interventions: Previously developed site – the extent of the future opportunity would need to be established (e.g. site clearance and potential restrictions from former use). No current land-based access to deep water although liquid pipeline in situ.

Regionally Important Strategic Site

Larger than Local Economic Study – Strategic Sites

E3. SOUTH HOOK LNG



Name: South Hook LNG
Location: 193662 205660

Description: This site is an existing site as identified within LDP1 . The existing site is entirely occupied by South Hook LNG who are considered to be a regionally significant employer.

Sector Focus/Unique Characteristics:
 The site has direct access to deep water and owing to the presence of an existing strategic employer is focused on the energy sector.

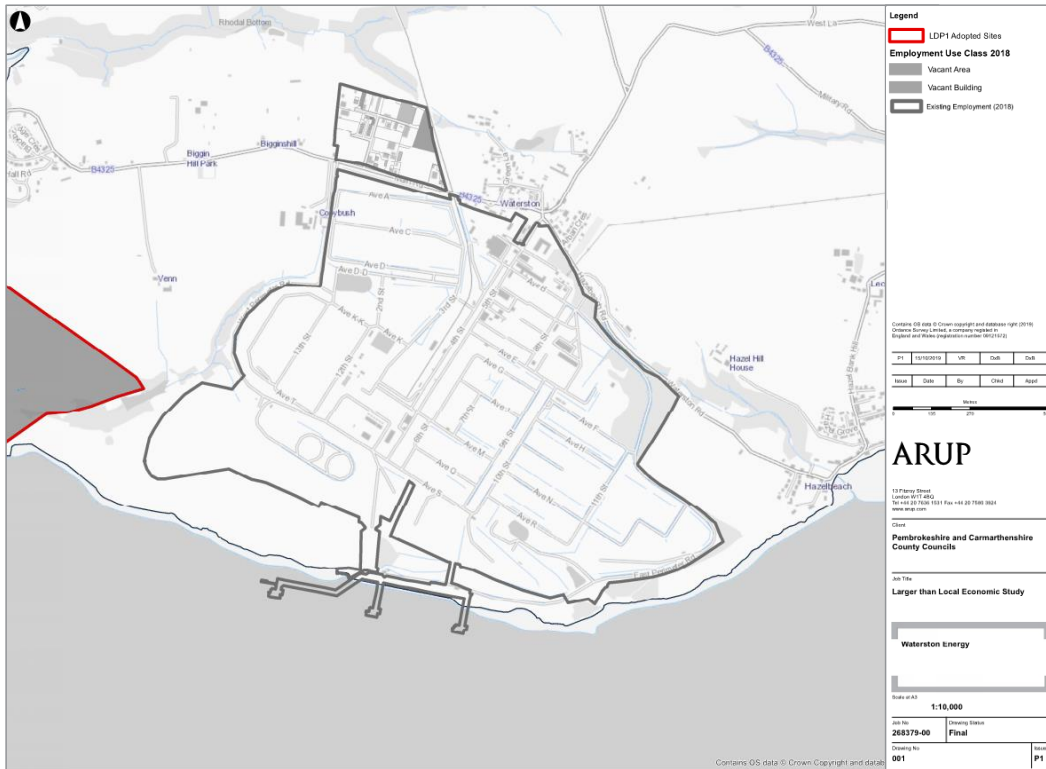
Site Area:
 201.0ha

Most Relevant Broad Interventions: INV2, INV4
Site Interventions: Significant locational constraints, including partial location within the National Park and adjacency to the ecologically sensitive Haven Waterway.

Regionally Important Strategic Site

Larger than Local Economic Study – Strategic Sites

E5. WATERSON ENERGY



Name: PetroPlus (Dragon LNG terminal)
Location: 193675 205597

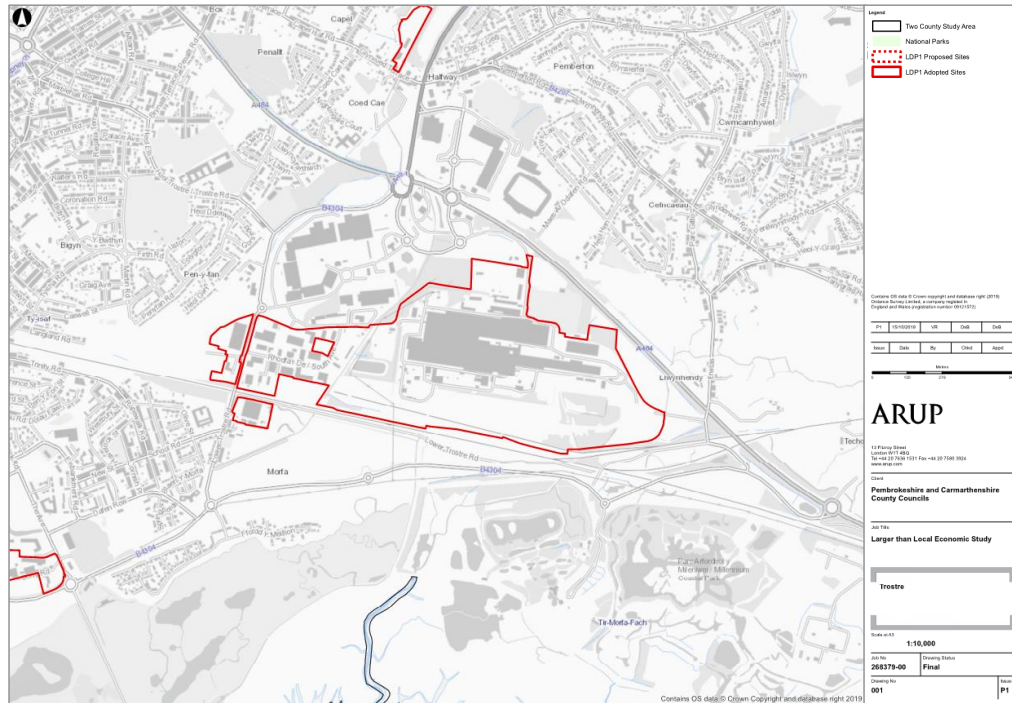
Description: Site is an existing employment site with no vacant land available. The existing site is entirely occupied by Dragon LNG who are considered to be a regionally significant employer.

Sector Focus/Unique Characteristics:
Site is considered to be a strategic employment site linked to the energy sector.

Site Area:
17.7ha

Most Relevant Broad Interventions: INV2
Site Interventions: Locational constraints, including adjacency to the ecologically sensitive Haven Waterway.

Regionally Important Strategic Site



Name: Trostre Llanelli
Location: 252735 199391

Description: Site is identified as an existing employment site within LDP1. Existing employment stock comprises Tata Steel, considered to be a strategic employer of regional importance, as well as more local employment uses to the south west of the site. Site has limited vacancy/room for expansion or redevelopment.

Sector Focus/Unique Characteristics:

Site has good access to the A484 and in reasonable proximity to Llanelli railway station (approximately 2.2 miles).

Site Area:

70.4 ha

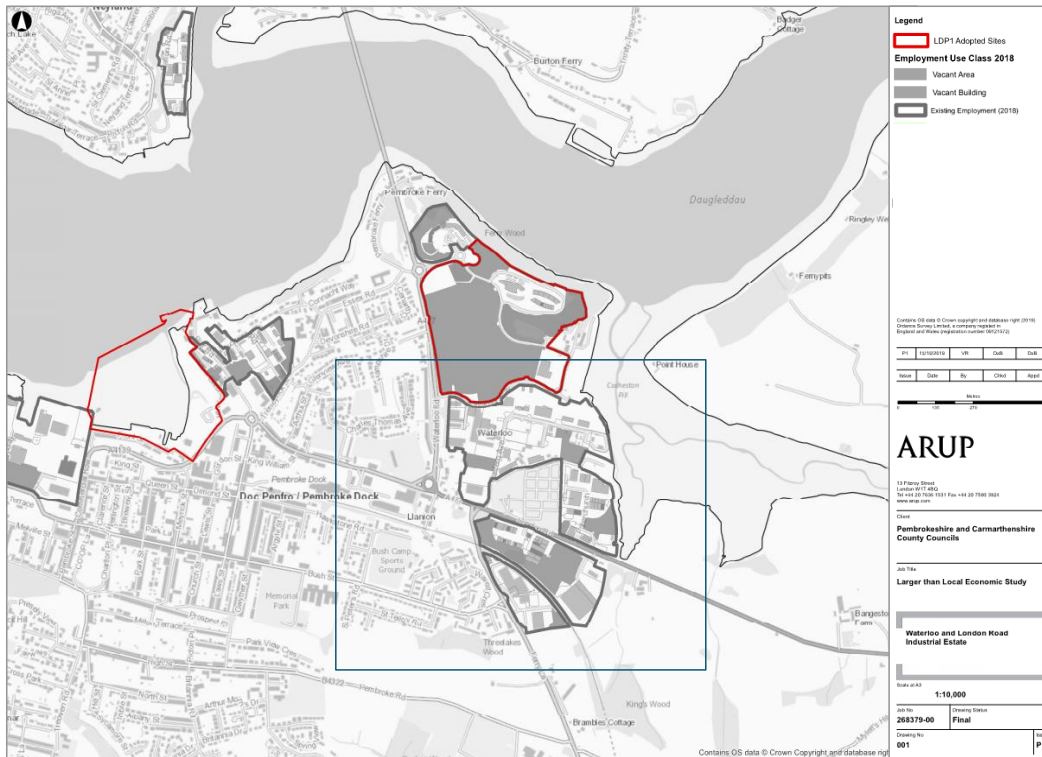
Most Relevant Broad Interventions: INV2, INV4

Site Interventions: Support existing employer through continued engagement and understanding of needs.

Regionally-important Strategic Site

Larger than Local Economic Study – Strategic Sites

E7. WATERLOO AND LONDON ROAD INDUSTRIAL ESTATE



Name: Waterloo and London Road Industrial Estate
Location: 197987 203716

Description: Site is an existing employment site (B2, B8, Sui Generis uses) as stated within Development Sites SPG. There are some vacant plots available but expansion potential is largely limited. Site is within the Haven Waterway Enterprise Zone.

Sector Focus/Unique Characteristics:

Evidence of supply chain uses associated the existing Port development e.g. Jenkins and Davies Engineering, Ledwood Engineering.

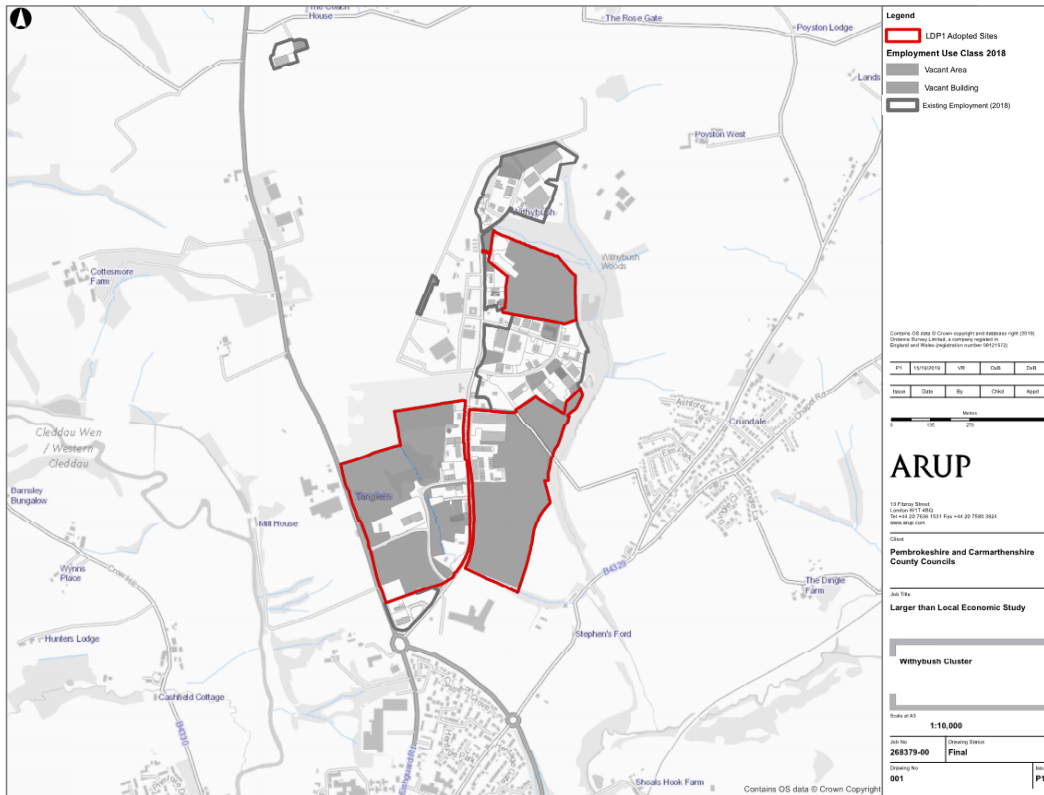
Site Area:

32.0ha

Most Relevant Broad Interventions: INV2, INV4

Site Interventions: Locational constraints, including adjacency to the ecologically sensitive Haven Waterway, and part of the site is liable to flooding and has contamination issues.

Sector-specific / Supporting Strategic Site Clusters



Name: Withybus Cluster

Location: 197329 232541

Description: Site is partially operational but with a large amount of vacant land for redevelopment to the east and west potentially to support existing uses.

Site is situated within the Haven Waterway Enterprise Zone and has current proposals for a Food Park.

Sector Focus/Unique Characteristics:

Site is developing an identity around food production and distribution anchored by strategic employers (e.g. Puffin Produce). This would serve a regional function and would be strengthened by the existing proposals to develop a food park at land to the east of the business park.

Good access to A40 trunk road.

Site Area:

42.0ha

Most Relevant Broad Interventions: INV1, INV2, INV4, INV5

Site Interventions: Electricity infrastructure upgrade needed to support future uses. Consideration of sites relationship with Haverfordwest Airport and future expansion areas.

Regionally Important Strategic Site

Sector Specific/Supporting Strategic Site Cluster

Larger than Local Economic Study – Strategic Sites

02. THORNTON INDUSTRIAL ESTATE CLUSTER



Name: Thornton Industrial Estate Cluster

Location: 190681 207448

Description: Site comprises a mix of B2 and B8 employment uses which includes a mix of strategic employers e.g. Consort Claugden and supply chain companies e.g. M&A engineering with a focus on port-related functions.

The main Thornton Industrial Estate site is largely occupied however there is undeveloped land within the wider site cluster.

Sector Focus/Unique Characteristics:

Supply chain focus given sites proximity to wider strategic sites within the Haven Waterway and current employment base which is focussed around engineering and port-related functions.

Site Area:

41.2ha

Most Relevant Broad Interventions: INV1, INV2, INV4, INV5

Site Interventions: Part of the site was previously a (now demolished) Beryllium Factory, therefore likely contamination issues.

Sector-specific/Supporting Strategic Site Clusters



Name: Blackbridge
Location: 192006 205444

Description: Site is an LDP1 allocated employment site. The site is currently vacant but is known to be in single ownership and was subject to a recent application for the development of a renewable energy facility and aquaculture.

Site is within the Haven Waterway Enterprise Zone.

Sector Focus/Unique Characteristics:

Site is one of the only remaining sites with direct access to the deep water in the Milford Haven area. There is an opportunity to connect to aquaculture sectors at this location.

Site Area:
33.5ha

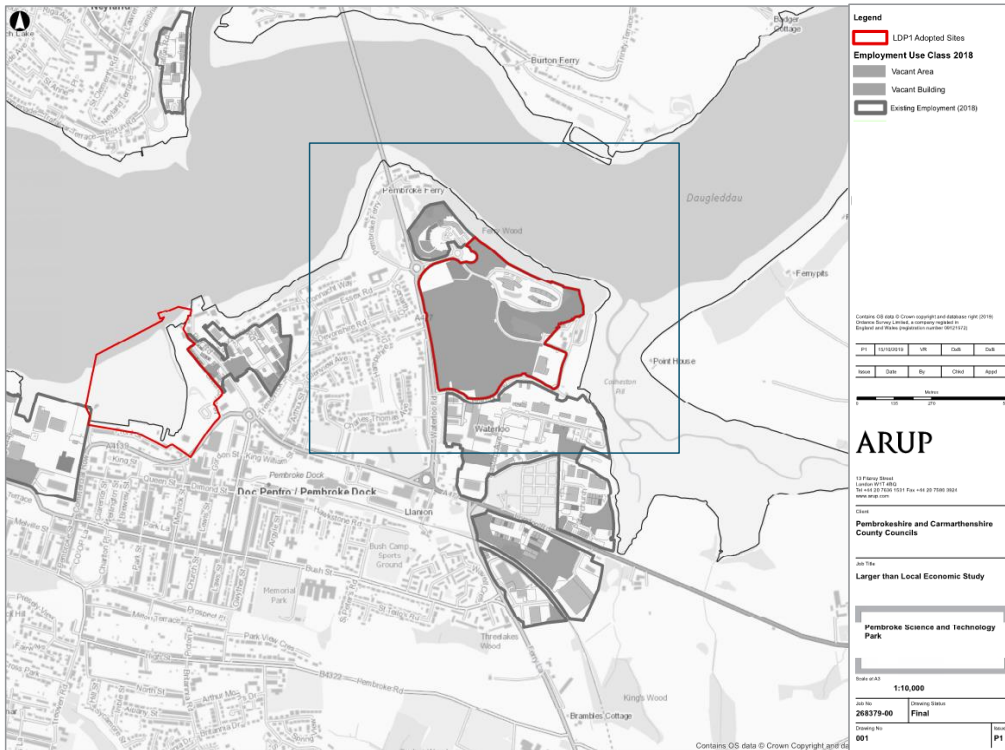
Most Relevant Broad Interventions: INV1, INV4, INV5

Site Interventions: Site topography is known to be a constraint / challenge to development, as is road access, site contamination and ecology / nature conservation.

Regionally Important Strategic Site

Larger than Local Economic Study – Strategic Sites

O4. PEMBROKE SCIENCE AND TECHNOLOGY PARK CLUSTER



Name: Pembroke Science and Technology Park

Location: 195881 203748

Description: The site comprises the Pembroke Science and Technology Park and surrounding LDP2 candidate sites including Land at Cleddau Bridge Business Park, Land at Warrior Way and Cleddau Bridge Business Park itself. Large amount of vacant land available with some key employers linked to the port / marine sector (e.g. Bombora Wave Power).

Site is within the Haven Waterway Enterprise Zone.

Sector Focus/Unique Characteristics:

Evidence of sectoral demand at the site for a clustering of employers associated with the marine energy sector.

Site Area:

45.9ha

Most Relevant Broad Interventions: INV1, INV2, INV4, INV5

Site Interventions: Site review in order to ensure sufficient land for future development opportunity whilst also exploring / facilitating wider potential (e.g. renewable energy generation).

Regionally Important Strategic Site



Name: Bynea Llanelli
Location: 255597 198512

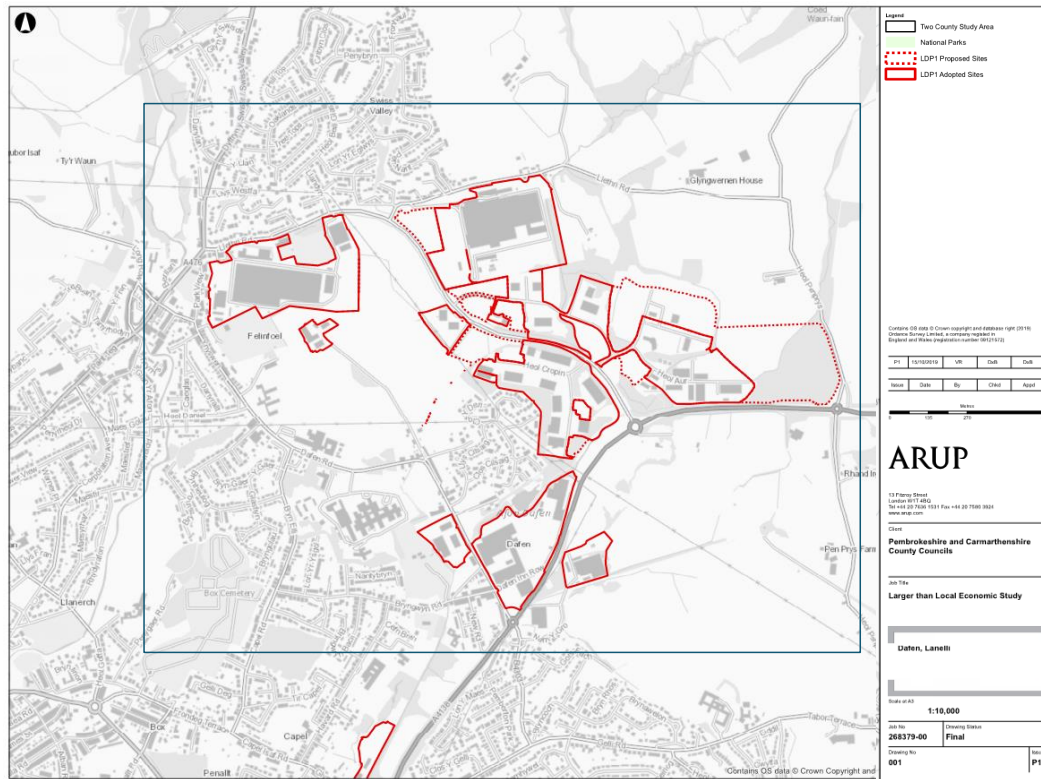
Description: Site is occupied by mixed employment uses (B1, B2, B8). Known redevelopment/reconfiguration potential due to the closure of the Schaeffler plant to the north east of the site. Evidence of companies which support larger manufacturing uses (e.g. Qualitek Engineering).

Sector Focus/Unique Characteristics:
 Direct access to A484 providing good linkages to neighbouring Swansea. Evidence that the site currently has a sector focus on manufacturing mainly through supply chain companies although this may have been compromised by Schaeffler closure.

Site Area:
 29.7ha

Most Relevant Broad Interventions: INV1, INV2, INV4, INV5
Site Interventions: Site strategy recommended in order to establish future interventions in order to attract future investment / occupiers.

Regionally-important Strategic Site



Name: Dafen, Llanelli
Location: 252749 202180

Description: Site is an LDP1 existing employment site and a proposed employment site for LDP2. The site is occupied by strategic, regional employers including Calsonic Kansei and Gestamp Tallent. Evidence of companies which support larger manufacturing uses (e.g. Treharne Automotive) as well as distribution (e.g. Owens Group).

Sector Focus/Unique Characteristics:

Direct access to A4138 providing direct link to M4 motorway.

Site is developing a sector focus on manufacturing and associated supply chain uses.

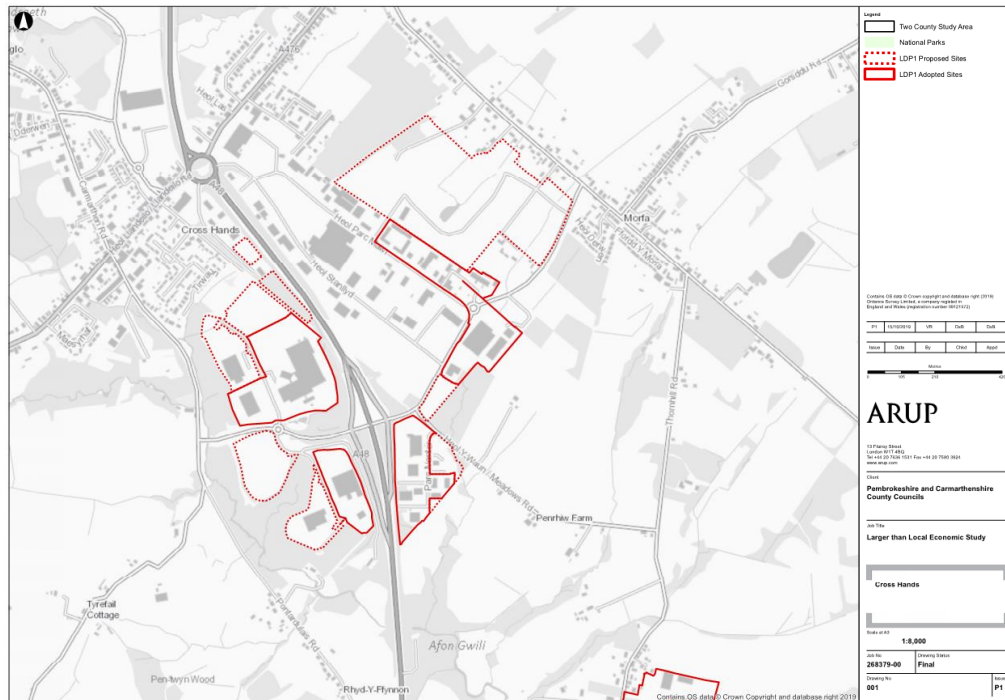
Site Area:

61.0ha

Most Relevant Broad Interventions: INV1, INV2, INV4, INV5

Site Interventions: Site is known to have some ground condition constraints and work to understand / cost remediation of the site should be conducted should the site be promoted for strategic investment.

Regionally-important Strategic Site



Name: Cross Hands
Location: 256826 212568

Description: Site includes the existing Cross Hands Industrial Estate as well as vacant LDP2 proposed employment sites and Cross Hands Food Park. Site is occupied by a range of B1, B2 and B8 uses including regionally strategic employers primarily in the food sector (e.g. Castell Howell and Dawn Meats)

Sector Focus/Unique Characteristics:
 Site has east/west slips on to the A48/M4 making it highly accessible.

Site Area:
 98.5ha

Developing a nationally recognised identity around the food manufacturing and distribution sector.

Most Relevant Broad Interventions: INV1, INV4, INV5
Site Interventions: Site strategy and promotion in order to ensure the site attracts the right investment given its strategic location. Potential links to nearby Parc Hendre to be explored.

Regionally Important Strategic Site

Sector Specific/Supporting Strategic Site Cluster



Name: Parc Hendre
Location: 259647 210990

Description: Site includes adopted and proposed employment sites within the adopted LDP. The site is occupied by a number of manufacturing companies in large units which are considered to perform a 'larger than local' function and has sufficient vacant land for expansion.

Site is situated in close proximity to Cross Hands and has good access to the A48/M4 strategic road network via the A483.

Sector Focus/Unique Characteristics:
 Site could develop further to have a sector-specific focus on the manufacturing sector. The proximity to Cross Hands also means potential links / supporting functions could be explored.

Site Area:
 73.9ha

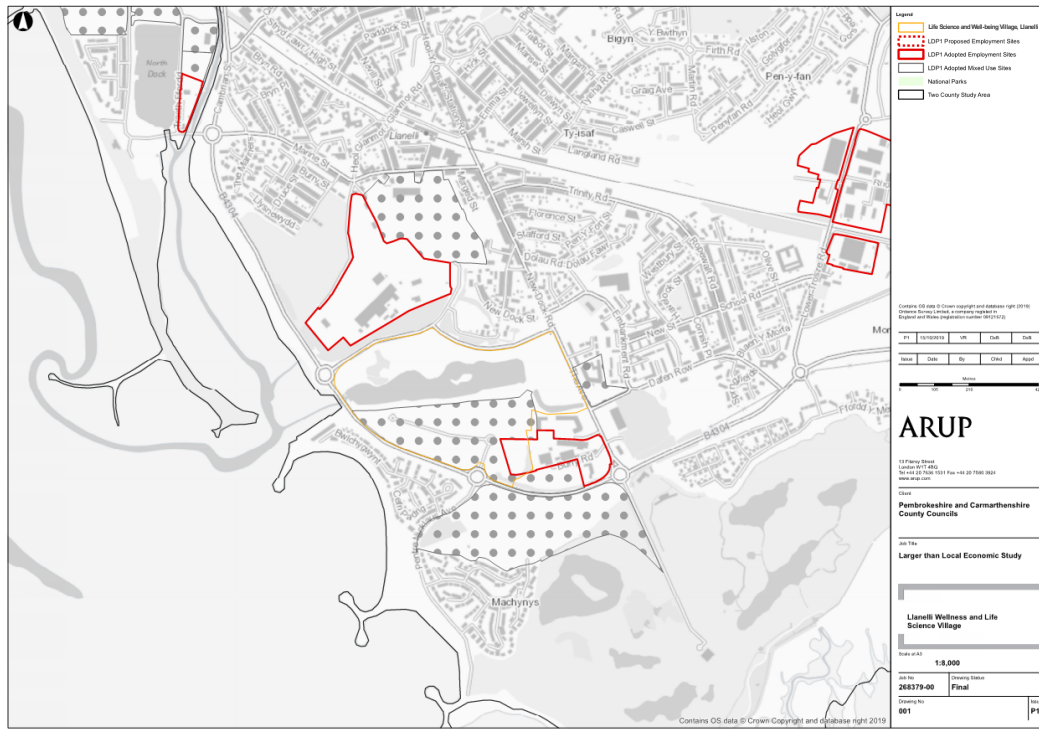
Most Relevant Broad Interventions: INV1, INV4, INV5
Site Interventions: Sites relationship with Cross Hands and key sectors requiring strategic road access to be explored.

Regionally Important Strategic Site

Sector Specific/Supporting Strategic Site Cluster

Larger than Local Economic Study – Strategic Sites

O9. LIFE SCIENCE AND WELL-BEING VILLAGE, LLANELLI



Name: Llanelli Wellness & Life Science Village
Location: 259647 210990

Description: A key site / project as part of the Swansea Bay City Deal, this strategic site forms an important investment in the life sciences sector, a key Welsh Government Priority. Proposals include a wellness village that will provide business, education, leisure and health facilities. There are a number of adjacent mixed use sites (which do not form part of the Strategic Employment Site designation).

Sector Focus/Unique Characteristics:

Life sciences is a key sector focus for this site which would provide a hub for the sector within the region.

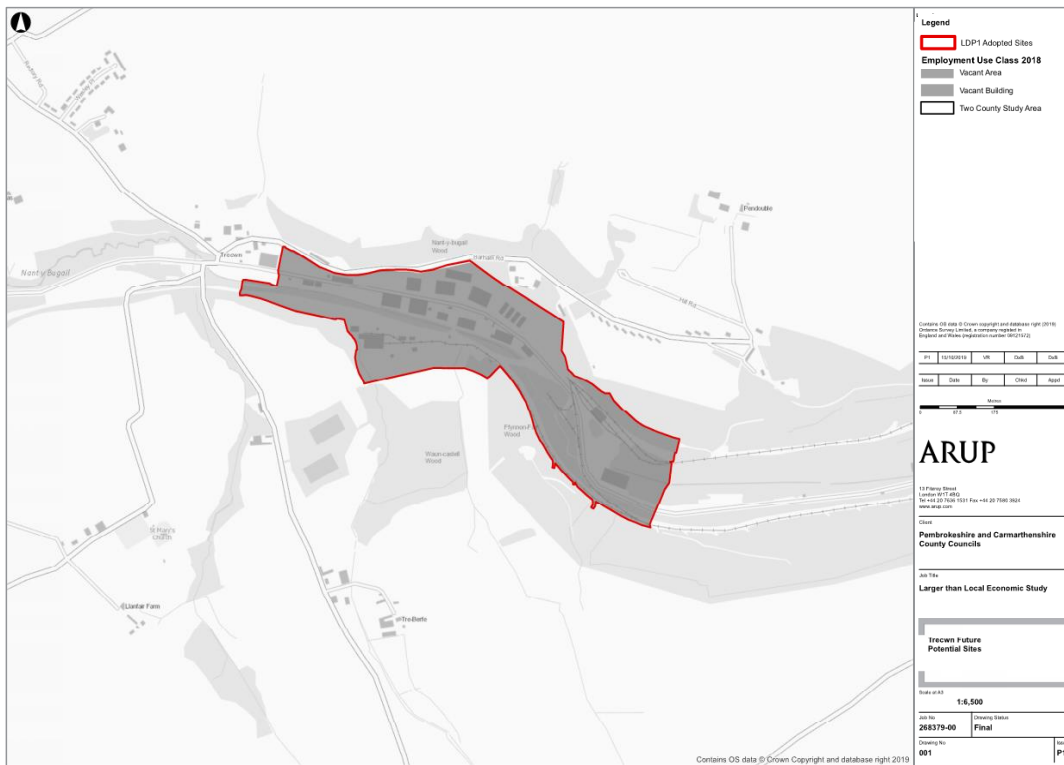
Site Area:
18.6ha

Most Relevant Broad Interventions: INV1

Site Interventions: Committed site – intervention to attract end users and generate greatest wider economic benefit.

Regionally Important Strategic Site

Sector Specific/Supporting Strategic Site Cluster



Name: Trecwn
Location: 197329 232541

Description: The site is a currently adopted strategic site allocation, and forms part of the Haven Waterway Enterprise Zone. It is understood that the site has received a number of enquiries but remains vacant.

Sector Focus/Unique Characteristics:
The Trecwn site is unique in terms of its location and on-site features. The site could attract highly specialised industries with specific locational requirements.

Site Area:
21.2ha

The site is isolated, secure and has an underground tunnel network as well as a series of former military buildings on site. The site also benefits from a railhead which could serve future development.

Likely to be more suited to certain specific sectors (e.g. tourism), or end users with specific site requirements (e.g. secure site).

Most Relevant Broad Interventions: INV1, INV4, INV5
Site Interventions: Active promotion / focussed market testing.

Future Potential Site

