

Regional Employment Land Study

On behalf of 4NW

30 March 2009

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1 Introduction

Scope and Purpose

- 1.1 4NW have instructed Gerald Eve supported by Arup to undertake an assessment of the commercial viability and local property market conditions of identified employment sites (B1 B2 and B8), over 5Ha in the North West region. This assessment is a vital component of 4NW's refresh of the quantitative and qualitative assessment phases of the regional employment land study completed in 2004.
- 1.2 Arup with Donaldsons were commissioned in 2004 to prepare a regional employment land study for the North West region. This research provided a quantitative and qualitative assessment of employment land in the North West and analysed the extent to which the provision of land is sufficient in quantity and quality, and appropriate in distribution, to meet the likely future demand in the period to 2021, and the requirements of the key sectors.
- 1.3 The appraisal was completed in April 2005, and acted as an essential component of the evidence base for the preparation of the Regional Spatial Strategy, providing much of the evidence base upon which the economic policies have subsequently been developed.
- 1.4 The Employment Land Study had two main objectives and associated outputs.
 - Phase 1 and 2: to provide an assessment of the quality and quantity of existing employment sites, over 5ha in size, in the North West; and
 - Phase 3: appraisal of how the provision of employment land could employment land requirements, up to 2021, based on employment forecasts.
- 1.5 4NW are undertaking a refresh of this study focusing on Phase 1 and 2 of the assessment i.e. the quantitative and qualitative assessment phases. 4NW have commissioned Gerald Eve with Arup to undertake a refresh of the commercial viability and market assessment of allocated and committed employed sites in the North West that are over 5ha in size. This element of the study will form part of the Regional Employment Land Study for the North West Region.
- 1.6 This final report provides a summary of the assessment process, a property market overview, the individual site scorings and concludes with maps illustrating the geographical spread of the 5ha employment sites showing the range of scorings for the commercial viability and local property market conditions.

Method

- 1.7 4NW have undertaken the employment land data gathering process by contacting all the Local Authorities in the region and requesting that they complete a proforma asking a series of questions regarding the supply of employment sites over 5 ha in size.
- 1.8 A copy of the proforma is contained within the appendix; complete with the criteria used to complete the fields. In order to maintain consistency with the previous study, the proforma has the same fields and criteria as the previous study completed in 2005 except for the following elements that

reflect the updated position of Regional policy as set out in the Regional Spatial Strategy (September 2008). For clarity these changes are listed below;

Planning Policy and Sustainability

- Conformity with Regional Spatial Strategy Objectives and Development Principles
- Site's position within the Regional Spatial Strategy Regional Spatial Framework
- Compliance with Regional Economic Strategy Vision (2006)

Deprivation in Local Communities

- Identification of site within Regeneration Priority Areas of West Cumbria & Furness or Regeneration area of Blackpool/Morecambe and East Lancashire - (as identified on the Regional Spatial Strategy Key Diagram)

1.9 The local authorities have completed the majority of the proforma for employment sites over 5 ha in size although 4NW have completed a proportion thereof. The local authorities and 4NW have completed the following fields:

- Availability and Deliverability
 - Ownership constraints
- Quality of Site and its Internal Environment
 - Contamination issues
 - Topographical constraints
 - Utilities and highways infrastructure constraints
 - Broadband access (criterion for B1 office sites only)
 - Quality of the sites internal environment
- RSS/RES Compliance
 - Conformity with RSS objectives and development principles
 - Sites position within the RSS Regional Spatial Framework
 - Compliance with RES vision
 - Extent to which the development of the site is constrained by the amenity considerations of adjacent occupiers
 - Facilities (both existing and potential retail, services etc) within the locality (i.e. 10-15 minutes walk)
- Strategic Access and Catchment
 - Ready access to motorway

- Pedestrian / cycling accessibility to site, both existing and proposed
- Existing congestion on surrounding road network
- Easy and appropriate local access for HGV's (criterion for B2/B8 industrial sites only)
- Environmental Sustainability
 - Previously developed in whole or part
 - Flood risk
 - Environmental constraints
- Economic Development
 - Unemployment levels
 - Deprivation in local communities
 - Identified within Regeneration Priority Areas of West Cumbria and Furness or regeneration area of Blackpool / Morecambe and East Lancashire – (See RSS key diagram)
 - Potential availability of 'gap' funding to develop
 - Density of economically active population in the district
- Other Policy Considerations
 - If site was de-allocated would there be development interest for non-employment uses?
 - Greenbelt
 - Other material policy considerations (to state)

1.10 Gerald Eve and Arup have been instructed to completed the following fields in the proforma:

- Availability and Deliverability
 - Market Interest in the site for the proposed use and financial viability
- Local Market Conditions
 - Supply of employment land;
 - Vacant floorspace in local market;
 - Local rents in regional context; and,
 - Local rents in sub-regional context.

1.11 The purpose of this element of the study was to assess the current market interest and deliverability of the employment sites across the North-West of England, identified to be assessed as part of this study. All of the sites to be assessed were plotted on a plan of the region, which is available in GIS.

- 1.12 The next stage in this process was to gather information on the property market within the region regarding supply and demand for employment accommodation, market activity, and rent and yield information to complete the assessment of commercial viability for the individual sites.
- 1.13 This information was derived from a range of sources including:
- Local & national commercial agents;
 - Property Week and Estates Gazette; and,
 - Promis and Focus database.
- 1.14 The property market overview is included within Section Two of this final report.
- 1.15 Using the property market overview and desktop knowledge of the sites an assessment has been derived at for each of the sites for the commercial viability and local property market conditions element of the proforma in accordance with the scoring mechanism used for the 2005 study. The scoring mechanism attributed a value between 1 – 5 according to a number of criteria. The scoring mechanism used is illustrated in table 1.1.

Table 1.1: Scoring Criteria

	Score 1	Score 2	Score 3	Score 4	Score 5
Market interest in the site for the proposed use and financial viability	Very Low	Low	Moderate	High	Very High
Supply of employment land	Very High supply of sites of a similar quality and type in the locality	High supply of sites of a similar quality and type in the locality	Moderate supply of sites of a similar quality and type in the locality	Low supply of sites of a similar quality and type in the locality	Would represent the only site of its type in the locality
Vacant floorspace in local market	Very High	High	Moderate	Low	Very Low
Local rents	Very Low	Low	Moderate	High	Very High
Local rents	Very Low	Low	Moderate	High	Very High

Source: Gerald Eve

- 1.16 The individual scorings have been collated per sub region and district basis. The final scores are contained within section 3. The individual sites were then mapped using GIS to show the full scoring ranges for each sub-region, using a traffic light system to illustrate the locations of stronger or weaker sites. The maps are included within section 4. The individual district proforma are contained within the appendix.
- 1.17 It should be noted that the market attractiveness and deliverability scores determined in this report will feed into the wider employment land work undertaken by 4NW. These scores have been combined with criteria (as outlined in paragraph 1.8) to assess the quality of the site and its internal environment to provide a robust assessment of how likely it is that the site will be developed for its proposed use, and how financially viable it is to the market.

Structure

1.18 This report is structured to meet the scope and purpose, set out above, as follows.

Section 2 – Property Market Overview

Section 3 – Individual site assessments collated by sub-region

Section 4 - Maps showing the range of scores on a sub-regional basis

2 Regional Property Overview

- 2.1 This section considers the markets for industrial and office space of the five sub-regions of the North West. For Greater Manchester and Merseyside, the assessment focuses on the cities of Manchester and Liverpool as the main areas of activity within these regions.

Greater Manchester

Context

- 2.2 Greater Manchester is the fastest-growing city region outside of London. The 2008 UK Cities Monitor charts the views of senior executives and named Manchester City Centre second only to London as the best location for business. The European Cities Monitor also placed it among the top 20 "best cities to locate a business today."
- 2.3 Manchester City Centre is the largest and fastest growing centre for financial, professional and legal services outside London, with 60 banks (40 overseas-owned) based in Manchester City Centre. The BBC are relocating five departments from London and around 1,500 jobs to mediacity:uk in Salford in 2011.
- 2.4 Manchester International Airport provides excellent accessibility to domestic and international markets. By train, recent modernisation of the West Coast main line has reduced Manchester-London journey times to just over two hours, with 50 trains per day.
- 2.5 Greater Manchester has the benefit of the M60 orbital motorway, which provides good transport links across the North West. Manchester Airport is a major regional transport hub and is a significant airport in terms of cargo tonnage in the UK.
- 2.6 Greater Manchester has one of the largest student populations in the UK with Manchester University, Manchester Metropolitan University, the University of Salford, the University of Bolton and the University Centre Oldham.

Demand - Take Up

Office

- 2.7 Office take up across the city-region was estimated to be 2,061,000 sq. ft. (191,473 sq. m) in 2007. This figure was boosted by a number of large pre-let agreements including the decision from the BBC to relocate certain departments to mediacity:uk. The BBC have agreed a pre-let for 330,000 sq. ft. (30,658 sq. m.) of accommodation to be completed by 2011. In total pre-let and purpose-built accommodation have averaged 21% of the total take up in the Greater Manchester office market in the five years to 2007.
- 2.8 By sector, the key driver of office demand to 2008 has been business services which has accounted for 40% of all take up. Analysing demand for office accommodation over the last five years to 2008 reveals that there have been 5 transactions over 100,000 sq. ft (9,290 sq. m.); 9 transactions of 50-100,000 sq. ft. (4,645 – 9,290 sq. m.) and 39 transactions of 25-50,000 sq. ft. (2,322 – 4,645 sq. m.) The most significant deal is the BBC's decision to relocate various departments from London to mediacity:uk in Salford Quays.

2.9 The out of town office market in Greater Manchester spreads south from the City Centre along the main arterial routes which link the City Centre to the Airport, the M60 motorway and the towns of Altrincham, Cheadle and Stockport. There is a fairly even split between business parks and stand alone office in the towns to the south of Greater Manchester.

Industrial

- 2.10 Industrial take up across the sub-region is estimated to be 2,727,000 sq. ft. (253,346 sq. m.) for 2007. Up to 2008, demand for industrial accommodation has been very consistent within the sub region albeit that the demand has changed with less demand for production space and increased demand for distribution space.
- 2.11 Over the last 20 years, based on completions in Manchester, the average take up is 1,680,000 sq. ft. (156,077 sq.m.) per year.
- 2.12 Within Greater Manchester Trafford Park is the traditional prime industrial location, and has the largest concentration of industrial and warehousing space, although development options at Trafford Park are now limited.
- 2.13 The major areas of industrial activity within Greater Manchester are;
- Located to the south of the City near to the M56 and Manchester Airport including Sharston, Stanley Green and Roundthorn Industrial Estate and the World Freight Terminal at Manchester Airport.
 - Located to the North of the City with good motorway access and traditionally lower land prices; Heywood Distribution Park, Stakehill Industrial Estate, Chadderton Industrial Estate, Oldham Broadway and Kingsway Business Park.
 - Located to the east of the City is Bredbury Park Way which is located on the Stockport/Tameside border and Ashton Moss.
 - Located to the West of the City in Salford the key areas of industrial activity are located at Agecroft Commerce Park and North Bank Industrial Estate in Irlam.
- 2.14 Over the last 5 years to 2008, units of 100,000 sq. ft. (9,290 sq. m.) which typically involve distribution operators account for 36% of the total industrial floorspace for Greater Manchester. 21% of the industrial take up has been for units within the 25,000 – 50,000 sq. ft. (2,322 – 4,645 sq. m.) size range.
- 2.15 Prelets and purpose built industrial accommodation has averaged 27% of the total take-up over the 5 years to 2007 for Greater Manchester.

Supply – Availability

Office

2.16 Greater Manchester has an estimated 34.7 million sq. ft. (3.2 m sq. m.) of office accommodation at the end of 2007. 13.9 % of this stock was completed since 2002 and therefore is considered to be “new.” Over the last 20 years, completions in Manchester totalled 16.2m sq. ft. (1.5m sq. m.) equating to an average of 809,000 sq. ft. (75,158 sq. m.) per year.

- 2.17 Local authority district based completions during 2007 totalled 1,927,000 sq. ft. (179,022 sq. m.). In the Greater Manchester market, approximately 59% of the office space developed from 2002 has been developed speculatively with 41% being pre-let or purpose built.

Industrial

- 2.18 Greater Manchester has an estimated 83.1 m sq. ft. (7.72 sq. m.) of industrial stock as at 2003. Available industrial accommodation within Greater Manchester is estimated to be 15,490,000 sq. ft. (1,439,068 sq. m.) in 2008. However this is expected to reduce with no significant speculative schemes currently under construction.
- 2.19 46% of the industrial stock is defined as factories and 54% as warehouses. Within Manchester 5.9% of the total industrial stock can be considered new having been built within the last 5 years.

Rents

- 2.20 The highest rents for prime office accommodation within Manchester City Centre are at £28 per sq. ft (£301 per sq. m.) Headline rents for office accommodation within Salford Quays range from £16.50 per sq. ft - £21.50 per sq. ft. (£178 per sq. m. - £231 per sq. m.)
- 2.21 Within the out of town market there is a wide variation in achieved rents depending on the strength of the location and the quality of the space taken with rents ranging from £14-20 per sq. ft. (£150-£215 per sq. m) for offices in Altrincham, Sharston, and Cheadle.
- 2.22 The top rents for prime industrial accommodation are at £6.25 per sq. ft. (£67.27 per sq. m) with secondary accommodation achieving £3.5 to £5 per sq. ft. (£38 - £54 per sq. m.) dependence on location and specification.

Key Development Sites

- 2.23 The key strategic development sites within Greater Manchester are identified below.
- 2.24 Mediacity:uk is a significant transformational project being undertaken by Peel Holdings at a 200 acre (81 ha) site at Salford Quays. Peel Holdings have recently secured planning permission for a 171,000 sq. ft (15,886 sq. m.) building at MediaCity and The University of Salford have committed to acquiring 103,000 sq. ft. (9,569 sq. m) within the 18 storey building. As previously mentioned, the BBC intend to relocate several departments from London to MediaCity by 2011.
- 2.25 Rochdale Kingsway is a major employment-led mixed use development comprising of 420 acres (170 ha) benefiting from direct access to the M60 motorway in Rochdale. It is estimated that once fully developed, the site will accommodate in excess of 3.6 m sq. ft. (335,500 sq m) together with 300 new homes and other ancillary uses. Planning consent has recently been granted for a 616,000 sq. ft. (57,228 sq. m.) warehouse including a 22,500 sq. ft. (2,090 sq. m.) mezzanine office, which will be the largest warehouse to be developed in the North West since Pioneer Point at Ellesmere Port in 2005.
- 2.26 Port Salford is a significant proposal by Peel Holdings to create an inland port at Barton on the banks of the Manchester Ship Canal. It is proposed to provide an extensive distribution park served by rail, road and short-sea shipping.

- 2.27 Central Park is a high quality business park development particularly aimed at attracting businesses within the Information and Communication Technologies sector (ICT) located in East Manchester close to Manchester City Centre. When complete the Park will extend to 395 acres (160 hectares).
- 2.28 Central Bolton provides the opportunity to reposition and diversify the economic base of Bolton and deliver a strategic business location within North Greater Manchester by building upon the successful establishment and ongoing expansion of the University to create a high quality physical environment to attract knowledge based industries.
- 2.29 Wigan South Central Area includes a number of key strategic sites; Westwood Park, Pemberton Colliery and Wigan Pier Quarter, which in total could deliver up to 22,297 sq. ft (2,071 sq. m.) of office accommodation and 968,760 sq. ft (90,000 sq. m). of industrial accommodation.
- 2.30 City South is a investment programme along Oxford Road in Manchester City Centre, being brought forward by the Manchester City South Partnership, which comprises the largest group of current and planned investments in knowledge intensive activity in the north of England.
- 2.31 Townfields is a joint venture between Ask Developments and Bury Council to provide 165,000 sq. ft. (15,329 sq. m.) of office accommodation in Bury Town Centre. 40,000 sq. ft. (3,716 sq. m.) of offices will be occupied by Bury Council, with 7,500 sq. ft. (696 sq. ft.) of ground floor retail and leisure units as well as a 50,000 sq. ft. (4,645 sq. m.) building, which has been pre-let to Bury Primary Care Trust (PCT) for a medical centre.
- 2.32 St Petersfield is a new business quarter that will provide 400,000 sq. ft. (37,161 sq. m) of employment space located within half a mile of both Ashton-under-Lyne town centre and Junction 23 of the M60 Motorway. St Petersfield is being developed by Ask Property Developments, in partnership with Tameside MBC, North West Regional Development Agency and English Partnerships.
- 2.33 Manchester Airport are in the process of acquiring 30 acres to create 'Airport City' – an ambitious project to create retail, leisure, conferencing and commercial activities.
- 2.34 Extensive re-development is proposed within Stockport Town Centre, which although predominantly retail it will include a substantial element of business space.
- 2.35 Within the City Centre, the Co-op Group have confirmed that it will relocate from its existing headquarter site to a new 20 acre headquarter on the Northern Gateway. The new HQ is expected to be operational by 2011 and will house 3000 staff.
- 2.36 Ask are undertaking a major development within the City Centre called First Street, which when complete will provide 1.8 m sq. ft. (167,225 sq. m.) of office accommodation, 1,500 homes and 350,000 sq. ft. (32,516 sq. m.) of retail and leisure space.
- 2.37 Also within the City Centre Argent has signed a joint venture agreement with Greater Manchester Property Venture Fund to redevelop Elizabeth House, which in total could provide 350,000 sq. ft (32,516 sq. m) of accommodation.

Merseyside

Context

- 2.38 Merseyside is a national centre of excellence for life sciences and a European centre of biotechnological expertise. Merseyside has commercial strengths across a wide range of sectors, including business and financial services, creative and digital industries and automotive.
- 2.39 Merseyside has excellent transport links by road, and rail and benefits from Liverpool John Lennon Airport, which is one of the fastest growing airports in Europe. Liverpool John Lennon Airport connects to more than 70 destinations including New York. The Port of Liverpool is a major container port and acts as a key international gateway for the distribution of goods.
- 2.40 Public services account for 40.8% of the total jobs in Liverpool City Centre. Merseyside has three universities and a student population of over 50,000 and Liverpool was the European Capital of Culture 2008.

Demand – Take up

Offices

- 2.41 Annual take up in Merseyside is estimated to be 470,000 sq. ft. (43,664 sq. m.) for 2007, which is consistent with the average level of take up for the last 5 years to 2007, which is 465,000 sq. ft. (43,199 sq. m.)
- 2.42 By sector the key driver of demand for the last 5 years to 2008 has been business services, which accounts for 35% of all take up. This is closely followed by public services which accounts for 27% of all take up.
- 2.43 Pre-lets and purpose build offices have averaged 39% of the take up of all take up for the 5 years ending in 2007. Analysing the demand by size reveals that 4 transactions have taken place over 100,000 sq. ft. (9,290 sq. m.); 5 transactions have taken place between 50,001 – 100,000 sq. ft. (4,645 – 9,290 sq. m.) and 21 transactions have been completed between 25,000-50,000 sq. ft. (2,322 – 4,645 sq. m.). The majority of space taken up in the last 5 years have been for units under 25,000 sq. ft. (2,322 sq. m.)
- 2.44 The Liverpool City centre office market has a traditional office core between the River Mersey and the entrance to the Kingsway Mersey Tunnels, and also includes the waterfront area of modern offices to the north and south of the Queensway Tunnel. The majority of early development in the city centre was focused on the substantial waterfront area.
- 2.45 Liverpool's out of town market is made up of sites that lie to the north, east and south of the city centre as well as the Wirral.
- 2.46 Bootle provides a significant amount of office accommodation although the stock is dominated by 1960's office blocks and public sector occupiers. The largest office scheme in Merseyside for over 8 years was the 247,000 sq. ft (22,947 sq. m.) Redgrave Court occupied by the Health and Safety Executive (HSE) which was completed in 2005.

- 2.47 The principal towns of Birkenhead, St Helens, Kirkby, Southport and Knowlsey have their own limited office markets.

Industrial

- 2.48 In terms of industrial locations within the wider Merseyside area, the key industrial locations include Knowsley to the north east of the city, Speke to the south east and Birkenhead and Bromborough on the Wirral.
- 2.49 The Speke area close to Liverpool John Lennon Airport provides Boulevard Industrial Park and the Estuary Business Park and Halewood.
- 2.50 It is estimated that industrial take up in Liverpool for 2007 was 613,000 sq. ft. (56,949 sq. m). To provide further context, the average level of take up for the last 5 years to 2007 has been 972,000 sq. ft. (90,301 sq. m) however this high take up was driven by the transaction at Phoenix Park of 581,300 sq. ft (54,004 sq. m) in Speke in 2006.
- 2.51 Pre-lets and purpose built accommodation in Merseyside has averaged 34% of the total take up over the last 5 years to the end of 2007. Analysing the take up over the last 5 years; units over 100,000 sq.ft (9,290 sq. m) which typically involved distribution operators have accounted for 58% of the total floorspace in Liverpool. However the size band that has seen the largest share of the take up in Merseyside over the last 5 years to 2008 has been the 50 – 100,000 sq. ft (4,645 – 9,290 sq. m.) bracket, accounting for 16% of all space.

Supply – Availability

Offices

- 2.52 Merseyside has an estimated 21,528,000 sq. ft (2 m sq. m.) of offices including 280,000 sq. ft. (26,012 sq. m.) of public sector offices. Approximately 8,073,000 sq. ft. (750,000 sq. m.) is within the prime commercial core of Liverpool City Centre.
- 2.53 It is estimated that 2,001,000 sq. ft (15,899 sq. m) of office accommodation was available as at mid 2008 with 374,000 sq. ft. (34,745 sq. m) of office accommodation currently construction.

Industrial

- 2.54 Merseyside has an estimated 66.5 m sq. ft. (6.17m sq.m) of industrial accommodation as at 2003, with 61% of the accommodation defined as factories with 39% defined as warehouses.
- 2.55 6.3% of Merseyside industrial accommodation is described as new, having been built in the last 5 years. 55% of the industrial space developed over the last 5 years was developed speculatively.
- 2.56 It is estimated that 7,282,000 sq. ft (676,519 sq. m) of industrial space in Merseyside was available in 2008.

Rents

- 2.57 Prime headline office rents are £22 per sq. ft. (£236.80 sq. m.) within Liverpool City Centre with second-hand refurbished space available for approx £16.50 per sq. ft. (£177.60 sq. m.)

Prime buildings in out of town locations are approximately £14 per sq. ft. (£151 per sq. m.) with second grade accommodation at £9 per sq. ft. (£97 per sq. m.). Office rents are £6 per sq. ft. (£64.58 per sq. m.) for refurbished accommodation in Bootle ranging to £14 per sq. ft. (£151 per sq. m.) for office accommodation in Birkenhead.

- 2.58 Prime industrial rents are £5.00 per sq. ft. (£53.82 per sq. m.) with secondary accommodation ranging from £3-4.50 per sq. ft. (£37.67 - £48.43 per sq. m.)

Key Development Sites

- 2.59 The key strategic development sites within Merseyside are identified below.
- 2.60 Wirral Waters is a major mixed use development, predominantly offices and residential development covering 642 acres (260 ha) of brownfield land in Birkenhead which will be undertaken by Peel Holdings. The first phase includes a mixed use high rise development at East Float and a leisure and retail development at Bidston Dock. In total the scheme will provide over 8,073,000 sq. ft (750,000 sq. m.) of retail and commercial development.
- 2.61 Peel Holdings are also progressing another scheme on the other side of the River Mersey, Liverpool Waters. Liverpool Waters extends to 150 acres (60 ha) and incorporates 10 former docks and is proposed to create a new sector of the central city area in a prime waterfront location within walking distance of the commercial core. The scheme is expected to include 21,528,000 sq. ft. (2 million sq. m.) of offices, hotels, residential, and supporting shops.
- 2.62 Daresbury Park Developments Ltd, a joint venture between Maple Grove Developments and the De Vere Group, has been granted planning permission for a 39,998 sq.ft (3,716 sq.m) office building. This building will be part of the next phase of Daresbury Park, located off junction 11 of the M56 motorway in Cheshire. In total Daresbury Park has consent for 1.6 m sq. ft. (148,643 sq. m.) of office accommodation.
- 2.63 Daresbury Science & Innovation Campus is adjacent to Daresbury Park and provides an important location for hi-tech businesses and leading edge science, which provides an environment for innovation and business growth.
- 2.64 Parkside Colliery is located at Newton-Le-Willows and is proposed to provide 7.7 million sq ft (715,353 sq. m) of industrial accommodation as part of an inter-modal distribution scheme. The site is a former colliery and extends to 260 acres (105 ha.)
- 2.65 Wirral International Business Park comprises of 830 acres (336 hectares) of industrial, commercial, retail, leisure and residential areas at Bromborough, adjacent to the Mersey. It is part of the Wirral Waterfront regeneration area.
- 2.66 Liverpool International Business Park developed by Peel Holdings is a 157 acre (63 ha) site adjacent to Liverpool John Lennon Airport, which provides quality office accommodation. Peel Holdings also have plans to undertake further development close to Liverpool John Lennon Airport as part of the masterplan for the Airport to 2030.

- 2.67 The Liverpool Digital Initiative includes three sites, which will be transformed into a new business park aimed at attracting digital industries and technology sector. The project will include new roads, site access and landscaping, the demolition of some buildings and the refurbishment of others.
- 2.68 3 MG – Mersey Multimodal Gateway previously known as the Ditton Strategic Rail Freight Park is an ambitious proposal to deliver a rail freight park at Ditton. In total the development will provide 1,000,000 sq. ft. (92,903 sq. m.) of rail related distribution space; 842,000 sq. ft. (78,224 sq. m.) of industrial accommodation and 60,000 sq. ft. (5,574 sq. m.) of offices.
- 2.69 Stonebridge Park is a new business park fronting onto the A580 East Lancashire Road, within 1 mile of Junction 4 of the M57 which is being developed by St Modwen. In total the development will extend to 72 acres (29 ha) and when complete will provide 359,514 sq. ft. (33,400 sq m) of new office and light industrial accommodation, set within a park-style setting.
- 2.70 Widnes Waterfront, is an ambitious transformational masterplan that when complete will provide 1,119,456 sq. ft. (104,000 sq. m.) of industrial/commercial floorspace next to the proposed new Mersey crossing to Runcorn and the M56.

Cumbria

Context

- 2.71 The commercial property market in Cumbria is split into two distinctive areas; the M6 corridor including Carlisle, Penrith and Kendal, and the West Coast area comprising of commercial activity in the coastal towns of Workington, Whitehaven and Barrow in Furness.
- 2.72 In terms of the office market in Cumbria, the main focus is the city of Carlisle and the M6 corridor, due to the good transport links by the motorway and rail links to both Scotland and the North West. Kingmoor Park is the dominant industrial /distribution location in Cumbria, which is located (6.47km) 2.5 miles north of Carlisle adjacent to the junction 44 of the M6.
- 2.73 The principal locations for office accommodation on the West Coast is around Workington and Whitehaven. Although a number of office properties do exist in the town centres these are predominantly occupied by local and government agencies and departments. The majority of the purpose built office space is located out of town, at Lillyhall Business Park some 3 km (1.1 miles) south of Workington town centre and Westlakes Science Park (on the edge of Whitehaven). Both locations continue to benefit from significant public sector support and prioritisation.
- 2.74 The principal drivers of the commercial property markets in West Cumbria is the Energy Sector (Nuclear and Green), and Education and Research (University of Cumbria, Dalton Institute and Energus).
- 2.75 In addition to traditional commercial property sectors, confirmation of a significant investment and redevelopment project for the West Cumberland Hospital (on the edge of Whitehaven town centre), offers new potential for supply chain businesses and the development of premises to meet their needs.
- 2.76 In order to ensure that West Cumbria is able to take advantage of the opportunities presented by the nuclear decommissioning process taking place at Sellafield and the developing renewable energy sector, an Energy Coast Masterplan has been prepared. *“The Masterplan is an exciting package of*

projects that will establish West Cumbria as Britain's Energy Coast™ - a centre of excellence for nuclear and other energy technologies, complemented with high quality local services."

- 2.77 Barrow-in-Furness provides the commercial centre for South West Cumbria. Although the principal office market is driven by local businesses with office space located mainly on and around Abbey Road, the public sector agencies are aggressively promoting and facilitating the development of new commercial property to accommodate supply chain industries associated with marine engineering, civil nuclear construction and off-shore energy technologies. These initiatives have led to the completion of a 12,500 sq ft (1,161 sq. m.) speculative office building, of which the first floor has been let to the CPS.

Demand - Take up

- 2.78 Take up rates provided by Cumbria County Council for both industrial and office land confirm that 29 acres (11.7 ha) of land was completed in Cumbria for April 2007/March 2008. This is much lower than the average take up rate for the last 5 years to 2008, which was 60 acres (24.28 ha) pa.
- 2.79 For the year 2007/2008 the take up rate of 29 acres (11.77 ha) translates into 222,427 sq. ft (20,664 sq m) of accommodation; including 73,256 sq. ft. (6806 sq. m.) of offices (B1), 86,790 sq. ft. (8063 sq. m.) of industrial (B2) and 62,377 sq. ft. (5795 sq. m.) of storage and distribution (B8).

Office

- 2.80 Take up figures for the Cumbria sub region are not collated by surveying databases. However 'deal' transactions from Focus detailing leasehold transactions, (i.e. new lettings) show that 57,283 sq. ft (5,317 sq. m.) of office space was let from March 2008 to April 2009 in 46 recorded transactions.
- 2.81 The smallest suite that was let from March 2008 to April 2009 was 98 sq. ft (9 sq. m) and the largest suite was 8,800 sq. ft (818 sq. m.). 70% of the office units let from March 2008 to April 2009 were under 1000 sq. ft (93 sq. m.).

Industrial

- 2.82 Take up figures for the Cumbria sub region are not collated by surveying databases. However 'deal' transactions from Focus detailing leasehold transactions, (i.e. new lettings) show that 177,206 sq. ft. (16,463 sq. m.) of industrial space was let from March 2008 to April 2009 in 59 recorded transactions. 62% of the transactions between March 2008 to April 2009 were for units of 1,000 – 5,000 sq. ft. (93 sq. m. – 465 sq. m.).

Supply – Availability

- 2.83 In terms of supply, Cumbria has 968 acres (391.73 ha) of employment land as at January 2009.

Office

- 2.84 In terms of availability, Focus reports that 357,972 sq. ft (33,256 sq. m.) of office accommodation is currently available on the market in Cumbria. The smallest office suite is 17 sq. ft. (13 sq. m.) with the largest unit totalling 26,804 sq. ft (2490 sq. m.). The only unit currently being marketed that is under construction is at Westlakes Science & Technology Park.

Industrial

- 2.85 In terms of availability, Focus reports that 1,298,055 sq. ft. (120,592 sq. m.) of industrial accommodation is currently available on the market in Cumbria. 35,865 sq. ft (3333 sq. m.) of the available accommodation is under construction. The majority of the accommodation under construction is at Kingmoor in Carlisle.

Rents

- 2.86 Prime new build industrial units are currently being marketed at Kingmoor Park at £5.75 per sq. ft. (£61.90 per sq.m) which is the highest industrial rent in Cumbria. In terms of secondary accommodation, rents for industrial accommodation range from £1.10 to £4.00 per sq. ft. (£11.85 - £43.00 per sq.m) depending on location, size and quality. Better quality industrial accommodation is available at £4.00 per sq. ft. (£43.00 per sq.m).
- 2.87 Office rents for new build accommodation in and around Carlisle are available at £12.50 -£14.00 per sq. ft. (£134.55 - £150.70 per sq.m) with secondary accommodation in the City Centre available at £5-10.00 per sq. ft. (£53.80 - £107.60 per sq.m) depending on quality and size.
- 2.88 In respect of the West Coast locations office rents at Lillyhall are £8- £10.00 per sq. ft. (£86.10 - £107.60 per sq.m) whilst new build offices are currently being marketed at West Lakes Technology Park at £11.50 per sq. ft. (£123.80 per sq.m). A new build office building (speculatively built by the public sector) in Barrow has recently let at £10.50 per sq. ft. (£113 per sq.m) to the CPS.

Key Developments in Cumbria

- 2.89 Westlakes Science and Technology Park is a successful business park which has attracted over 61 organisations employing approximately 1,000 people in 10 major buildings. West Lakes Science and Technology Park is located a few miles from Sellafield and is home to a large number of nuclear and engineering businesses. The park has a further development capacity of 87.80 acres (35.53 ha) with a number of serviced development plots currently available for design and build schemes.
- 2.90 Maryport Business Centre will provide 15,295 sq.ft (1,421sq m) of lettable space for a wide variety of small and medium sized businesses, located to the south of Maryport Town Centre.
- 2.91 Norwepp is the joint property venture formed by the NWDA and Warner Estates which has purchased Cleator Moor Industrial Estate near Whitehaven in January 2009.
- 2.92 Penrith New Squares scheme in Penrith is a Town Centre scheme including 145,000 sq. ft. (13,470 sq.m) of shops, and 12,000 sq. ft. (1,114 sq.m) of office accommodation.
- 2.93 Lillyhall is a large 395 acre (160ha) predominantly manufacturing and distribution park, located on the A595 to the south east of Workington. Lillyhall is considered to be a strategic industrial area suitable for industrial and commercial use by local and inward investors. A significant proportion of the site is owned by the NWDA.
- 2.94 Derwent Howe is a key employment corridor to the west of Workington Town Centre. The area includes the (former) Corus steelworks, Clay Flatts Industrial Estate, Derwent Howe Industrial Estate and some non-employment uses. Eatonfield developments have recently been granted outline

planning application for a large mixed use development for the former Corus steelworks incorporating office development.

- 2.95 Kingmoor Park is one of the NWDA's 'Regional Strategic sites' indicating a site that has greater than local significance with demand expected at a regional, national and international level. Kingmoor Park is a high quality business park incorporating office, industrial and warehouse uses, on a former Ministry of Defence (MOD) site.
- 2.96 In total, Kingmoor Park covers an area of approximately 121 hectares (300 acres) and when complete will provide 185,806 sq. m. (2,000,000 sq. ft.) of employment floorspace. At present approximately 106,000 sq. m. (1,140,984 sq. ft.) of employment floorspace has been let to over 150 businesses.
- 2.97 Planning permission has been granted to Stobart Air Limited to develop Carlisle Airport, incorporating a major freight storage distribution facility including a chilled cross dock facility, with associated offices, personnel facilities and a new vehicle access from the A689. The proposals also include upgrading the airport facilities to attract commercial passengers and freight flights.
- 2.98 The Waterfront Barrow-in-Furness is an ambitious transformational project incorporating; 650 new homes, a 350-berth marina, a hotel, shops, leisure facilities, restaurants, bars, a sports ground, a watersports centre and the Waterfront Business Park. The Waterfront Business Park can accommodate a mixture of 54,142 sq.ft (5,030 sq.m) of B1, 167,152 sq.ft (15,529 sq.m) of B2 and 55,972 sq.ft (5,200 sq.m) of B8.

Lancashire

Context

- 2.99 Lancashire is one of the largest sub-regions in Britain, and has been the manufacturing powerhouse of the UK for 200 years. Lancashire is strong in the aerospace, automotive and advanced manufacturing sectors. The food and drink sector, which is Lancashire's second largest industry is worth £1.5billion.
- 2.100 Lancashire is well-connected in terms of motorways, the West Coast Main Rail line and Blackpool Airport. The Lancashire sub-region also benefits from Lancaster University and the University of Central Lancashire.
- 2.101 Office development in Lancashire is mainly located in the City of Preston and Lancashire. Preston has suffered from an oversupply of 70's accommodation in the City Centre, although there are some successful out of town office schemes for example South Rings capitalising on the proximity to the Motorway.
- 2.102 Development in Lancashire for employment uses is mainly concentrated around the M6 and M65 corridors.
- 2.103 In terms of industrial accommodation, Leyland and Chorley have a stronger industrial market than Preston. Blackpool has limited office development but provides a significant element of industrial accommodation, although this accommodation is mainly second-hand in nature.

- 2.104 Blackburn is the industrial centre of east Lancashire, although the market is composed of a number of estates with small to medium sized properties and occupiers.

Demand – Take Up

- 2.105 The total average annual take up of all employment land in the Lancashire sub-region is 68.2 hectares in 2005. Historically take up of allocated land employment land has been 0.63 hectares per year for Lancaster in 2006.

Industrial

- 2.106 Take up figures for the Lancashire sub region are not collated by surveying databases. However 'deal' transactions from Focus detailing leasehold transactions, (i.e. new lettings) show that 1,136,527 sq. ft (105,585 sq. m.) of industrial space was let from March 2008 to April 2009 in 158 transactions.
- 2.107 Within the Lancashire sub region industrial units let between March 2008 and April 2009 ranged between 129 sq. ft. (12 sq. m.) to 145,490 sq. ft. (13,516 sq. m.) in size. 45% of the lettings were in respect of units in the 1,000 sq. ft. - 5,000 sq. ft. (93 sq. m. – 465 sq. m.) size range.

Office

- 2.108 Take up figures for the Lancashire sub region are not collated by surveying databases. However 'deal' transactions from Focus detailing leasehold transactions, (i.e. new lettings) show that 474,014 sq. ft (44,037 sq. m.) of office space was let from March 2008 to April 2009 in 114 transactions. 54% of all the office letting transactions between March 2008 to April 2009 were within the size range 1,000 -5,000 sq. ft. (93 sq. m. – 465 sq. m.). 40% were for units under 1,000 sq. ft. (93 sq. m.).

Supply - Availability

- 2.109 Local authority information suggests that there is 1,068.58 hectares land currently available for employment uses in Lancashire.

Office

- 2.110 In terms of availability, Focus states that 2,281,006 sq. ft (211,890 sq. m.) of office accommodation is currently available on the market in Lancashire.

Industrial

- 2.111 In terms of availability, Focus reports that 8,902,677 sq. ft. (827,002 sq. m.) of industrial accommodation is being marketed in Lancashire. 86% of this space is defined as warehouse and storage.

Rents

- 2.112 Office rents within Preston City Centre, are £16.50 per sq. ft (£177.60 per sq.m) for new build offices, with second hand offices available from £9.00 -£12.50 per sq. ft. (£96.90 - £134.55 per sq.m) depending on size, quality and location. Office rents for new office accommodation in Lancaster City Centre are £14.00 per sq. ft. (£150.70 per sq.m).

- 2.113 Industrial rents within Preston area range from £2.80 - £4.20 per sq. ft. (£30.15 - £45.20 per sq. m).. with industrial rents in Blackpool ranging from £2-£5.00 per sq. ft. (£21.50 - £53.80 per sq. m).

Key Developments

- 2.114 A transformational masterplan has been produced for Blackpool, which includes 1,722,240 sq. ft. (160,000 sq. m.) of mixed use development, including offices for Blackpool Council, and the possibility of replacement courts, police headquarters, a health centre and a new library.
- 2.115 The Bailrigg site presents the opportunity to create a premier employment site in Lancashire for knowledge-based industries and university spin-out. This site is one of the NWDA's strategic regional sites, which has the potential to facilitate university related business development and to provide a quality setting for businesses that still require a link back to the university.
- 2.116 A masterplan has been prepared for the Freckleton area of Blackburn Town Centre to shape the physical improvement of the area following the completion of the Freckleton Bridge in 2008. It is proposed to provide a mix of uses incorporating an employment hub concept that will capitalise upon the existing and expanding further education /higher education academic presence in order to create closer links between education, skills and enterprise.
- 2.117 Central Preston provides the opportunity to support Preston's growth by promoting knowledge based development building on further development relating to the expansion of the University of Central Lancashire.
- 2.118 Land within the existing BAE Systems site at Samlesbury, Lancashire has been identified as a potential location for a proposed supplier park, which may provide an opportunity to develop a nationally important centre for aerospace and advanced manufacturing.
- 2.119 Whitebirk is intended to provide a premier employment site for East Lancashire. The site will act as a focus for high quality job growth and investment by businesses requiring good access to the primary road network.
- 2.120 The Preston East site is located on Junction 31a of the M6, four miles east of Preston. The site will provide approximately 700,000 sq ft (65,032 sq.m) of industrial/distribution space and extends to 35 acres (14.16 hectare).
- 2.121 A masterplan has been prepared for the Weavers Triangle in Burnley, which is located on the western side of Burnley town centre. Weavers Triangle is a ribbon development of predominantly 19th Century industrial buildings clustered around the Leeds and Liverpool Canal. The masterplan proposes a mix of uses including public open space, canal related leisure, managed workspace, residential, and offices.
- 2.122 The NWDA have purchased the former 50 acre (20 ha) Michelin factory in Burnley and are redeveloping the site for business use. Aircell, an aerospace systems manufacturer have expanded its operation in Burnley and taken accommodation at the site.
- 2.123 The revolution is a 128 acre (52 ha) is a high quality logistics and industrial park which is part of the one of the largest mixed use projects in the northwest – Buckshaw Village. The revolution provides

a quality business environment with excellent access to junction 28 of the M6 and junction 8 of the M61. The revolution provides both office and industrial accommodation.

Cheshire and Warrington

Overview

- 2.124 In the main commercial property development in Cheshire is concentrated around the M56 and M6 corridors. Cheshire has an active industrial market with Crewe, Middlewich, Warrington, Winsford and Ellesmere Port being the key industrial locations. Cheshire is a popular location for the industrial and distribution sector, due to its advantageous strategic location and easy access to motorways. The key locations for the 'big shed' market are Middlewich, Crewe and Ellesmere Port, with Pioneer Point (at Ellesmere Port) the largest scheme within the sub-region as a whole.
- 2.125 The key location for office development within Cheshire, are Chester, Warrington, and Crewe. The office market in Chester is split into two elements firstly, offices in the city centre and secondly, the business villages and parks on the edge of the city centre, most typified by Chester Business Park. The office market in Warrington is also split into two constituent parts, the business parks around the periphery and the Town Centre. Birchwood is the dominant office location in Warrington.
- 2.126 Crewe Business Park provides the majority of the new office accommodation in Crewe, although development opportunities are now limited. Northwich has continued to develop as an office location with a number of lettings taking place at Gadbrook Park. Macclesfield and Wilmslow have an established office market providing business park and office accommodation within the Town Centre. Cheshire Oaks has developed an office market close to motorway junction.

Demand - Take up

- 2.127 Take up for Cheshire is estimated to be 41ha per annum (101.31 acres) for employment land as at 2005.

Office

- 2.128 Take up figures for the Cheshire sub region are not collated by surveying databases. However 'deal' transactions from Focus detailing leasehold transactions, (i.e new lettings) show that 446,851 sq. ft (41,513 sq. m.) of office space was let from March 2008 to March 2009. 62% of the office lettings in the period March 2008 to April 2009 were in Warrington.

Industrial

- 2.129 Take up figures for the Cheshire sub region as a whole are not collated by surveying databases. However Industrial take up information is collated for Warrington and included below.
- 2.130 However 'deal' transactions from Focus detailing leasehold transactions, (i.e new lettings) show that 5,109,547 sq. ft (474,644 sq. m.) of industrial space was let from March 2008 to March 2009 for the Cheshire sub region.
- 2.131 Industrial take up for Warrington in 2007 was 1,123,000 sq. ft. (104,330 sq.m) with average take up in Warrington for the last five years to 2007 being 1,173,000 sq. ft (108,975 sq.m). Pre-lets and purpose build in Warrington average 12% of the total take up.

- 2.132 Industrial stock in Warrington is estimated to be 22.7 m sq. ft. (2.10m sq.m) at 2003, with 3% of the stock defined as new, having been built over the last 5 years. 57% of the space developed over the last 5 years to 2007 has been speculative and 43% of space built pre-let or purpose built. Clearly this level of speculative development will have fallen dramatically given the lack of development finance available and the rising occupier caution.

Supply - Availability

- 2.133 The supply of employment land in Cheshire is estimated to be 2,893 acres (1,171 ha).

Office

- 2.134 In terms of availability, Focus states that 4,945,444 sq. ft. (459,400 sq. m.) of office accommodation is currently being marketed in Cheshire. 20% of the total office accommodation currently on the market in Cheshire is located in Warrington.

Industrial

- 2.135 In terms of availability, Focus reports that 16,180,448 sq. ft. (1,503,200 sq. m.) of industrial accommodation is being marketed in Cheshire. 86% of this space is defined as warehouse and storage. 93% of the industrial accommodation currently being marketed in Cheshire is defined as warehouse and storage accommodation.

Rents

- 2.136 Top industrial rents in Warrington and Crewe were reported to stand at £5.50 per sq. ft. (£59.20 per sq. m.) as at mid 2008. Secondary industrial accommodation range from £2.50-5.00 per sq. ft. (£26.90 - £53.81 per sq.m) depending on location, age and location.
- 2.137 Refurbished grade B office accommodation in Warrington Town Centre is available at £10 per sq. ft. (£108 per sq. m.) with prime office rents at Birchwood Park at £17.50 per sq. ft. (£188.36 per sq.m) with second-hand accommodation available at £12.50 per sq. ft (£134.55 per sq.m).
- 2.138 Office rents for new accommodation at Crewe Business Park range between £134.55 - £172.22 per sq. m. (£12.50 to £16 per sq.ft) on a leasehold basis and approx. £1,991 per sq. m. (£185 psf) on a freehold basis.

Key Developments

- 2.139 Midpoint 18 is a significant employment site located in mid-Cheshire, immediately to the east of Middlewich and within 2 miles of Junction 18 of the M6. When complete the development will comprise of 142 hectares (350 acres) and provides distribution, production and office buildings. Whilst this is predominantly an industrial location, it does provide a significant element of office accommodation.
- 2.140 Birchwood Park is a successful office development undertaking by MEPC located adjacent to the M62 Motorway, providing a range of office accommodation including an industrial element. The Park provides high standards of amenities including a coffee shop, a 500 seat restaurant, health and fitness club, nursery and conference facility. MEPC are continuing to develop speculatively which will increase the floorspace to from 1.1. m sq. ft. (102,193 sq.m) to 1.8m sq. ft (167,225 sq.m).

- 2.141 Omega is a 226 hectare (558 acre) brownfield site adjacent to and bisected by the M62 motorway in Warrington. This site is a Strategic Regional Site that will be developed over the next 25 years by Miller Developments and the Royal Bank of Scotland in a joint venture partnership with English Partnerships. The first two phases of development comprise a total of 148,644 sq m (1.6 million sq ft) of industrial and distribution space to the north of the site and 130,00 sq m (1.4 million sq ft) of office accommodation to the south. In total the site will provide 4.5m sq. ft. (418,063 sq.m) of industrial and distribution space.
- 2.142 Lingley Mere is a development undertaken by United Utilities and Muse Developments located near junction 8 of the M62. At Lingley Mere 40 acres (16.2 ha) are available for development.
- 2.143 Crewe University Quadrant is a collection of development sites that when considered collectively present a substantial development opportunity in economic terms for the region as a whole. The Basford sites are a key development which comprise of 363 acres (147 ha) which are allocated for employment uses.
- 2.144 Liberty properties are developing the former police headquarters site in Chester City Centre, which when complete will provide 350,000 sq. ft. (32,516 sq.m) of mixed use development incorporating 65,000 sq. ft. (6,038 sq.m) of office accommodation.

3 Market Assessments

- 3.1 The individual employment sites have been assessed on a desktop basis by a Chartered Surveyor using the scoring criteria in Table 1.1 and the results have been collated by sub-region in Tables 3.1 – 3.5.
- 3.2 The individual proforma per district are included within the appendix.

Table 3.1 Cumbria

Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
CUSL01	Cumbria	South Lakeland DC	Station Yard Milnthorpe (SE Milnthorpe Station)	2	3	3	2	2	12
CUCR01	Cumbria	Carlisle	Carlisle Airport	4	3	3	3	4	17
CUCR02	Cumbria	Carlisle	Brunthill	2	3	3	3	4	15
CUCR03	Cumbria	Carlisle	Land south of Park Road	2	3	3	3	3	14
CUCR04	Cumbria	Carlisle	Morton	2	3	4	3	3	15
CUCR05	Cumbria	Carlisle	Kingmoor Park	3	3	3	3	4	16
CUCO01	Cumbria	Copeland	E1 Westlakes Phase 2	3	2	5	3	4	17
CUCO02	Cumbria	Copeland	E1 Westlakes Phase 3	3	2	5	3	4	17
CUCO03	Cumbria	Copeland	E1 Westlakes Phase 4	3	2	5	3	4	17
CUCO04	Cumbria	Copeland	E7 Leconfield Extension	1	3	2	2	3	11
CUCO05	Cumbria	Copeland	E2 Whitehaven Commercial Park	1	3	4	2	3	13
CUED01	Cumbria	Eden	Gillwilly Industrial Estate Extension	2	3	3	2	3	13
CUAL01	Cumbria	Allerdale	Lillyhall Industrial Estate (WKEM4)	1	1	4	1	3	10
CUAL02	Cumbria	Allerdale	Lillyhall Industrial Estate (WKEM6)	1	1	4	1	3	10
CUAL03	Cumbria	Allerdale	Oldside	1	1	3	1	2	8

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents Regional	Local Rents Sub-Regional	Total
CUAL04	Cumbria	Allerdale	Port of Workington Industrial Estate	2	4	4	2	3	15
CUAL05	Cumbria	Allerdale	Lillyhall Industrial Estate (WKEM2)	1	1	4	1	3	10
CUAL06	Cumbria	Allerdale	Lillyhall Industrial Estate (WKEM3)	1	1	4	1	3	10
CUBR01	Cumbria	Barrow in Furness	E2 West of Robert McBride	1	3	3	2	3	12
CUBR02	Cumbria	Barrow in Furness	BP9*	n/a	n/a	n/a	n/a	n/a	0
CUBR03	Cumbria	Barrow in Furness	WBP1	2	2	4	2	3	13

* Site BP9 (CUBRO3) has not been considered as part of this study as this site has been acquired by Barrow-in-Furness Borough Council as part of the Marina Village Development. Barrow Marina Village is a mixed use development comprising of residential, leisure and marina uses.

Table 3.2 Cheshire & Warrington

Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
CHWA01	Cheshire and Warrington	Warrington	Omega Phases 1 & 2	4	3	3	5	5	20
CHWA02	Cheshire and Warrington	Warrington	Lingley Mere Phase 2	4	3	4	4	5	20
CHWA03	Cheshire and Warrington	Warrington	Burtonwood Services (Westbound)	3	3	3	4	4	17
CHWA04	Cheshire and Warrington	Warrington	Gemini 16	4	3	3	4	4	18
CHWA05	Cheshire and Warrington	Warrington	Forrest Way Business Park	2	3	4	3	3	15
CHWA06	Cheshire and Warrington	Warrington	Capitol Park	4	3	3	4	5	19
CHWA07	Cheshire and Warrington	Warrington	Birchwood Park Parcel 7	4	3	3	5	5	20
CHWA08	Cheshire and Warrington	Warrington	Olympic Park	3	3	3	4	4	17
CHWA09	Cheshire and Warrington	Warrington	Omega Phases 3, 4, and 5	3	3	4	4	5	19
CHCG01	Cheshire and Warrington	Congleton - Cheshire East	Capricorn Science and Technology Park	2	4	4	2	3	15
CHCG02	Cheshire and Warrington	Congleton - Cheshire East	DP1(M2)/ DP3(M2) New Farm/Centura Foods Booth Lane	1	3	3	2	2	11
CHCG03	Cheshire and Warrington	Congleton - Cheshire East	DP1(M3)/DP3(M1) Brooks Lane, Road/Road Beta	3	4	3	3	3	16
CHCG04	Cheshire and Warrington	Congleton - Cheshire East	DP1(M1) South of Cledford Land (Midpoint 18)	1	3	3	2	2	11
CHCR01	Cheshire and Warrington	Crewe and Nantwich - Cheshire East	Land to the East of University Way, Crewe	3	3	3	3	4	16
CHCR02	Cheshire and Warrington	Crewe and Nantwich - Cheshire East	Land adjoining Crewe Green Link Road	3	3	3	3	4	16
CHCR03	Cheshire and Warrington	Crewe and Nantwich - Cheshire East	Land off Pym Lane, Crewe	2	3	3	3	2	13
CHCR04	Cheshire and Warrington	Crewe and Nantwich - Cheshire East	Basford East	2	3	3	3	3	14
CHCR05	Cheshire and Warrington	Crewe and Nantwich - Cheshire East	Basford West	3	3	3	3	3	15
CHMC01	Cheshire and Warrington	Macclesfield BC - Cheshire East	Tytherington Business Park	3	3	3	3	3	15
CHMC02	Cheshire and Warrington	Macclesfield BC - Cheshire East	South Macclesfield Development Area	2	2	3	2	3	12
CHMC03	Cheshire and Warrington	Macclesfield BC - Cheshire East	Parkgate Industrial Estate Extension	3	3	3	3	3	15

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Region	Total
CHMC04	Cheshire and Warrington	Macclesfield BC - Cheshire East	Skyparks Handforth	4	3	3	4	3	17
CHCC01	Cheshire and Warrington	Chester	Bumpers Lane	3	4	3	3	3	16
CHCC02	Cheshire and Warrington	Chester	Former Ince Power Station (remaining area)	2	2	4	2	2	12
CHVR01	Cheshire and Warrington	Vale Royal	Lostock Triangle	3	4	3	2	3	15
CHVR02	Cheshire and Warrington	Vale Royal	Gadbrook Phase 1C, Northwich	3	4	3	2	3	15
CHVR03	Cheshire and Warrington	Vale Royal	Land at Lostock Works Railway Sidings	1	4	3	2	3	13
CHVR04	Cheshire and Warrington	Vale Royal	Site of Engineering Works, Winnington Avenue, Northwich	1	2	3	2	2	10
CHVR05	Cheshire and Warrington	Vale Royal	Land comprising Winnington Island, Wallerscote Island and land to the West and East of Of Winnington Avenue, Northwich	1	2	3	2	2	10
CHVR06	Cheshire and Warrington	Vale Royal	South Bostock Road, Winsford	2	3	3	2	3	13
CHVR07	Cheshire and Warrington	Vale Royal	New Cheshire Salt Works	2	3	3	2	2	12
CHEP01	Cheshire and Warrington	Ellesmere Port and Neston	Land at Station Road, Ince	2	2	4	2	2	12
CHEP02	Cheshire and Warrington	Ellesmere Port and Neston	Ince Power Station	2	2	4	2	2	12
CHEP03	Cheshire and Warrington	Ellesmere Port and Neston	Ince Marshes	2	2	4	2	2	12
CHEP04	Cheshire and Warrington	Ellesmere Port and Neston	Hooton Park Strategic Sites	2	3	4	2	2	13
CHEP05	Cheshire and Warrington	Ellesmere Port and Neston	Stanlow Special Policy Area (Collection of sites)	2	2	4	2	2	12
CHEP06	Cheshire and Warrington	Ellesmere Port and Neston	Site adjacent Vauxhalls	3	3	3	3	3	15
CHEP07	Cheshire and Warrington	Ellesmere Port and Neston	Former Gas, Board Site	3	4	3	3	4	17
CHEP08	Cheshire and Warrington	Ellesmere Port and Neston	Clayhill (collection of sites)	3	4	3	3	3	16

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Table 3.3 Greater Manchester

Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
GMBY01	Manchester	Bury	Chamberhall	2	4	3	2	3	14
GMSL01	Manchester	Salford	Boysnope Wharf	2	2	4	3	3	14
GMSL02	Manchester	Salford	Barton	3	2	4	3	3	15
GMSL03	Manchester	Salford	Agecroft Business Park	3	3	3	3	4	16
GMSL04	Manchester	Salford	Irlam Wharf Road, Northbank	3	3	3	3	4	16
GMSL05	Manchester	Salford	Cleggs Lane	2	4	2	3	3	14
GMSL06	Manchester	Salford	Quays Point	5	3	3	5	4	20
GMRD01	Manchester	Rochdale	Kingsway Business Park	4	2	3	4	4	17
GMRD02	Manchester	Rochdale	Hareshill Road, Heywood	2	3	3	3	4	15
GMRD03	Manchester	Rochdale	Heywood Distribution Park (site P11)	3	3	3	3	4	16
GMRD04	Manchester	Rochdale	Heywood Distribution Park (site M7)	3	3	3	3	4	16
GMRD05	Manchester	Rochdale	Genesis Business Park	2	4	3	3	3	15
GMRD06	Manchester	Rochdale	Land north of Oldham Rd, Middleton	2	2	3	3	3	13
GMRD07	Manchester	Rochdale	Royle Road, Rochdale	2	4	3	3	3	15
GMST01	Manchester	Stockport	Gorse Bank	2	3	4	3	3	15
GMST02	Manchester	Stockport	Thomas Storey	2	3	4	3	3	15
GMOL1	Manchester	Oldham	British Gas, Higginshaw Lane, Royton	2	2	3	3	2	12
GMOL2	Manchester	Oldham	Albert Street, Hollinwood	3	3	3	3	3	15
GMOL3	Manchester	Oldham	Robert Fletchers (Greenfield) Ltd, Chew Valley, Greenfield	1	4	4	2	2	13

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
GMTR01	Manchester	Trafford	Carrington Business Park	3	2	4	3	2	14
GMTR02	Manchester	Trafford	Former Powergen Site - Phase 1	3	2	4	3	2	14
GMTR03	Manchester	Trafford	Former BP Terminal	4	2	4	3	2	15
GMTR04	Manchester	Trafford	Former Gas Works Site	3	2	4	3	2	14
GMTR05	Manchester	Trafford	Former Carrington Gas Station	3	2	4	3	2	14
GMTR06	Manchester	Trafford	Land at Carrington	2	2	4	3	2	13
GMTR07	Manchester	Trafford	Davenport Green	1	4	4	4	3	16
GMTR08	Manchester	Trafford	The Bridgewater Centre	3	3	3	4	3	16
GMTR09	Manchester	Trafford	Argos Canal Side Street	4	3	3	4	4	18
GMTR10	Manchester	Trafford	Container Base	4	3	3	4	4	18
GMBO01	Manchester	Bolton	Horwich Loco Works	3	3	4	3	4	17
GMBO02	Manchester	Bolton	Salford Road (Cutacre)	3	3	3	3	3	15
GMBO03	Manchester	Bolton	British Aerospace	3	3	3	3	3	15
GMBO04	Manchester	Bolton	Singing Clough	2	3	2	3	3	13
GMWG01	Manchester	Wigan	Parsonage	3	3	3	2	3	14
GMWG02	Manchester	Wigan	Chaddock Lane, Astley	3	4	3	3	3	16
GMWG03	Manchester	Wigan	Gibfield, Atherton	3	3	3	3	3	15
GMWG04	Manchester	Wigan	West of Leigh Road, Hindley green	2	3	3	2	3	13

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
GMWG05	Manchester	Wigan	Swan Lane, Hindley Green	2	3	3	2	3	13
GMWG06	Manchester	Wigan	Westwood Park	4	3	3	3	4	17
GMWG07	Manchester	Wigan	Martland Park and Heinz	3	3	3	3	3	15
GMWG08	Manchester	Wigan	Pemberton Colliery	4	4	3	3	4	18
GMWG09	Manchester	Wigan	South Lancashire Industrial Estate	3	3	3	3	4	16
GMMA01	Manchester	Manchester	Manchester Business Park	2	2	3	4	4	15
GMMA02	Manchester	Manchester	Central Park	3	3	4	4	4	18
GMMA03	Manchester	Manchester	Astra Zeneca Site	2	3	3	3	3	14
GMMA04	Manchester	Manchester	Ardwick West Goods Depot	3	2	2	3	3	13
GMMA05	Manchester	Manchester	Thorley Lane	2	2	3	4	4	15
GMTA01	Manchester	Tameside	Plot 3000 Ashton Moss	2	3	3	4	3	15

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Table 3.4 Lancashire

Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
LAPE01	Lancashire	Pendle	Former Barnsey Shed and adjacent field	2	4	3	2	2	13
LAPE02	Lancashire	Pendle	Barrowford Business Park (Phases 1 & 2)	2	4	3	2	3	14
LACH01	Lancashire	Chorley	Botany/Great Knowsley	2	4	3	3	3	15
LACH02	Lancashire	Chorley	Cowling Farm	1	4	3	2	3	13
LACH03	Lancashire	Chorley	M61/Botany	2	4	3	3	3	15
LACH04	Lancashire	Chorley	Southern Commercial Area	3	2	3	3	4	15
LACH05	Lancashire	Chorley	Regional Investment Site	2	2	3	3	4	14
LABL01	Lancashire	Blackpool	Blackpool Business Park	2	4	2	2	3	13
LAWL01	Lancashire	West Lancashire District Council	Simonswood 1	2	2	3	2	3	12
LAWL02	Lancashire	West Lancashire District Council	Greaves Hall Hospital	1	4	4	2	2	13
LAWL03	Lancashire	West Lancashire District Council	XL Business Park	4	3	3	2	3	15
LAWL04	Lancashire	West Lancashire District Council	White Moss Business Park	3	3	3	2	3	14
LAWL05	Lancashire	West Lancashire District Council	Cobbs Clough Employment Area	2	4	4	2	2	14
LAWL06	Lancashire	West Lancashire District Council	Tawd Paper Mill, Paddock Road, W Pimbo, Skelmersdale	3	3	3	2	3	14
LAWL07	Lancashire	West Lancashire District Council	Proctor & Gamble UK, Pinfold Place, W Pimbo, Skelmersdale	3	3	3	2	3	14
LAWR01	Lancashire	Wyre BC	Hillhouse, Thornton	1	2	3	2	2	10
LAWR02	Lancashire	Wyre BC	Fleetwood Road North, Thornton	1	2	3	2	2	10
LAWR03	Lancashire	Wyre BC	Fleetwood Docks	2	3	3	2	2	12

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Region	Total
LASR01	Lancashire	South Ribble	Lostock Hall Gasworks	1	3	4	3	3	14
LASR02	Lancashire	South Ribble	South Rings	3	3	3	3	4	13
LASR03	Lancashire	South Ribble	Adjacent Farington Road	2	2	3	3	3	11
LASR04	Lancashire	South Ribble	Adjacent Lancashire Enterprise Business Park	2	2	3	3	3	11
LASR05	Lancashire	South Ribble	Carr Lane, Farrington	3	2	3	3	3	14
LASR06	Lancashire	South Ribble	Moss Side Tesk Track	1	2	3	3	3	14
LASR07	Lancashire	South Ribble	Matrix Park	3	3	4	3	4	14
LASR08	Lancashire	South Ribble	MIIS (major Investment Site)	2	2	3	3	4	14
LALN01	Lancashire	Lancaster DC	Former British Gas Depot	1	3	3	2	3	12
LALN02	Lancashire	Lancaster DC	Mellishaw North	3	3	3	2	3	14
LALN03	Lancashire	Lancaster DC	Carnforth Business Park	1	4	4	2	2	13
LALN04	Lancashire	Lancaster DC	Heysham Waste technology Centre	1	4	4	2	2	13
LALN05	Lancashire	Lancaster DC	Lancaster Science Park	2	4	4	3	4	17
LALN06	Lancashire	Lancaster DC	Mellishaw South	1	3	3	2	3	12
LAHY01	Lancashire	Hyndburn	Site G	3	3	2	3	3	14
LAHY02	Lancashire	Hyndburn	Site M	3	3	2	3	3	14
LAHY03	Lancashire	Hyndburn	Site U	2	3	3	3	4	15

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Region	Total
LAHY04	Lancashire	Hyndburn	Site V	1	4	4	2	2	13
LAHY05	Lancashire	Hyndburn	Waste Management Site	1	4	4	2	2	13
LABR01	Lancashire	Burnley	Bladerstone Lane	2	3	3	2	3	13
LABR02	Lancashire	Burnley	Hepworths	1	3	3	2	2	11
LABR03	Lancashire	Burnley	Land at Stoneyholme	2	4	4	2	3	15
LABR04	Lancashire	Burnley	Land adjacent to Liverpool Road	2	3	3	2	2	12
LAPR01	Lancashire	Preston	Preston East Employment Area	4	2	3	3	4	16
LAPR02	Lancashire	Preston	Red Scar	3	2	3	3	3	14
LAPR03	Lancashire	Preston	Red Scar Site F	2	2	3	3	3	13
LAPR04	Lancashire	Preston	Land North of Eastway	3	2	3	3	3	14

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Table 3.5 Merseyside

Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
MRSE01	Merseyside	Sefton	Former Peerless Refinery and Adjoining Land	2	2	3	2	3	12
MRSE02	Merseyside	Sefton	Atlantic Park	2	2	3	2	3	12
MRSE03	Merseyside	Sefton	Southport Commerce Park and Proposed Extension	2	2	3	2	3	12
MRKN01	Merseyside	Knowsley	Ford/Jaguar Expansion Land	2	2	3	2	3	12
MRKN02	Merseyside	Knowsley	Roscoe's Wood	2	2	3	2	3	12
MRKN03	Merseyside	Knowsley	Perimeter Road / Acornfield Road	2	2	3	2	3	12
MRKN04	Merseyside	Knowsley	Britonwood	2	2	3	2	3	12
MRKN05	Merseyside	Knowsley	North Perimeter Road / Moss End Way	2	2	3	2	3	12
MRKN06	Merseyside	Knowsley	Part of Yorkshire Imperial Metals	2	2	3	2	3	12
MRKN07	Merseyside	Knowsley	Pirelli South	2	2	3	2	3	12
MRKN08	Merseyside	Knowsley	Kings Business Park	2	2	3	2	3	12
MRHL01	Merseyside	Halton	Johnsons Lane	2	2	3	2	3	12
MRHL02	Merseyside	Halton	Daresbury Park	2	2	3	2	3	12
MRHL03	Merseyside	Halton	Daresbury Park	2	2	3	2	3	12
MRHL04	Merseyside	Halton	Ex Sleeper Depot	2	2	3	2	3	12
MRHL05	Merseyside	Halton	253/0	2	2	3	2	3	12
MRHL06	Merseyside	Halton	Manor Park II	2	2	3	2	3	12
MRHL07	Merseyside	Halton	Ditton Freight Terminal Site 1	2	2	3	2	3	12

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
MRHL08	Merseyside	Halton	Ditton Strategic Freight	4	3	4	3	4	18
MRHL09	Merseyside	Halton	Croda Europe	2	3	4	3	3	15
MRSH01	Merseyside	St Helens	Lea Green Farm East	2	3	3	3	4	15
MRSH02	Merseyside	St Helens	Lea Green Farm West	4	3	3	3	4	17
MRSH03	Merseyside	St Helens	Land SW Sandwash Close	2	4	3	3	2	14
MRSH04	Merseyside	St Helens	Land At Washway Lane	2	4	3	3	2	14
MRSH05	Merseyside	St Helens	Pocket Nook	2	3	3	3	4	15
MRSH06	Merseyside	St Helens	Ravenhead Glass	3	4	2	3	3	15
MRSH07	Merseyside	St Helens	Land At Cowley Hill	2	4	3	3	2	14
MRWI01	Merseyside	Wirral	Cammell Lairds - South of Wet Basin	3	2	3	3	3	14
MRWI02	Merseyside	Wirral	Birkenhead Dock Estate - Bidston Dock	3	2	3	3	3	14
MRWI03	Merseyside	Wirral	Lever Faberge	2	2	3	3	3	13
MRWI04	Merseyside	Wirral	RHM Mills and Canada Creek	3	2	3	3	3	14
MRWI05	Merseyside	Wirral	Bromborough Coast	2	2	3	3	3	13
MRWI06	Merseyside	Wirral	North Road Former Tank Farm Complex	2	2	3	2	2	11
MRWI07	Merseyside	Wirral	MOD Tank Farm	2	2	3	3	3	13
MRWI08	Merseyside	Wirral	Former UML Power Station	2	2	3	3	3	13
MRWI09	Merseyside	Wirral	QE2 Dock	2	2	3	3	3	13

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
MRW110	Merseyside	Wirral	Bankfields	2	2	3	2	2	11
MRW111	Merseyside	Wirral	Premier Brands	3	4	3	2	3	15
MRW112	Merseyside	Wirral	Former River Streets	2	2	3	3	3	13
MRW113	Merseyside	Wirral	Hind Street Regeneration Area	3	2	3	3	3	14
MRW114	Merseyside	Wirral	Former RV Chemicals	2	2	3	3	3	13
MRW115	Merseyside	Wirral	Former Stone Manganese Marine	3	2	3	3	3	14
MRW116	Merseyside	Wirral	Sky City, Vittoria Dock	4	2	4	3	4	17
MRW117	Merseyside	Wirral	Woodside	4	2	3	3	3	15
MRLV01	Merseyside	Liverpool	SOUTHERN SECTION OF THE FORMER NORTHERN AIRFIELD	3	2	2	3	4	14
MRLV02	Merseyside	Liverpool	STONEBRIDGE BUSINESS PARK - LAND ALONG THE A580 BETWEEN LOWER LANE & BACK GILLMOSS LANE	4	2	4	3	3	16
MRLV03	Merseyside	Liverpool	GILLMOSS BUSINESS PARK / EAST LANCASHIRE ROAD	3	2	3	3	3	14
MRLV04	Merseyside	Liverpool	LAND EITHER SIDE OF SPEKE HALL ROAD, NORTH OF LIVERPOOL JOHN LENNON AIRPORT	4	2	3	3	4	16
MRLV05	Merseyside	Liverpool	STANLEY INDUSTRIAL ESTATE (NORTH OF PRESCOT ROAD)	2	3	3	2	2	12
MRLV06	Merseyside	Liverpool	PICTON ROAD GOODS SIDINGS	2	2	3	2	2	11
MRLV07	Merseyside	Liverpool	LAND TO WEST OF EVANS ROAD	2	2	3	3	3	13
MRLV08	Merseyside	Liverpool	FORMER MTL PREMISES EDGE LANE	4	3	4	3	4	18

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Site No	Sub Region	District	Site Name	Market Interest	Supply	Vacant	Local Rents - Regional	Local Rents - Sub Regional	Total
MRLV09	Merseyside	Liverpool	N/W CORNER OF GILLMOSS IND EST/ STONEBRIDGE LANE / EAST LANCS ROAD	2	2	2	3	3	12
MRLV10	Merseyside	Liverpool	WELLINGTON DOCK	2	2	2	2	3	11
MRLV11	Merseyside	Liverpool	SOUTHERN SECTION OF SANDHILLS BUSINESS PARK	3	2	2	3	3	13
MRLV12	Merseyside	Liverpool	FORMER BRITISH RAIL LAND, DOCK ROAD / GARSTON	2	2	3	2	2	11
MRLV13	Merseyside	Liverpool	SPEKE SIDINGS (WEST SIDE)	2	2	3	2	3	12
MRLV14	Merseyside	Liverpool	ESTUARY BUSINESS PARK / FORMER NORTHERN AIRFIELD PLOTS H1B / H1C	4	2	2	3	4	15

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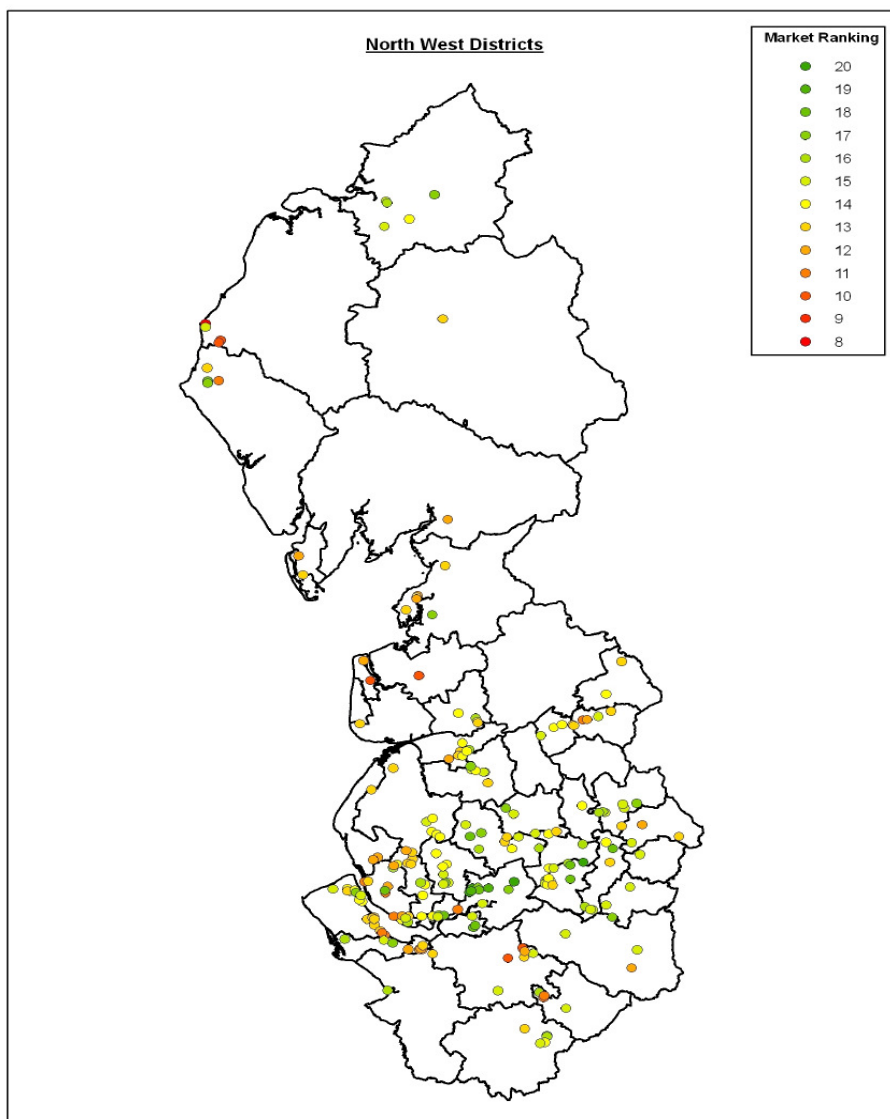
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4 Market Ranking Maps

- 4.1 The total of the individual site assessments in tables 3.1-3.5 have been mapped using GIS on a regional and sub-regional basis and are included in Figures 4.1 to 4.6.
- 4.2 The maps show the range of market rankings for each sub-region which has been colored using a traffic light system to illustrate the range of scores; therefore green indicates the highest rated sites in the sub-region. However Figure 4.1 shows the market ranking on a regional basis which can differ from those contained within Figure 4.2-4.6 which are collated on a sub-regional basis. For example a site scoring 14 may on a sub-regional basis be considered to be in the upper range, although when compared on a regional basis, this site would be considered to be in the middle range.

Figure 4.1



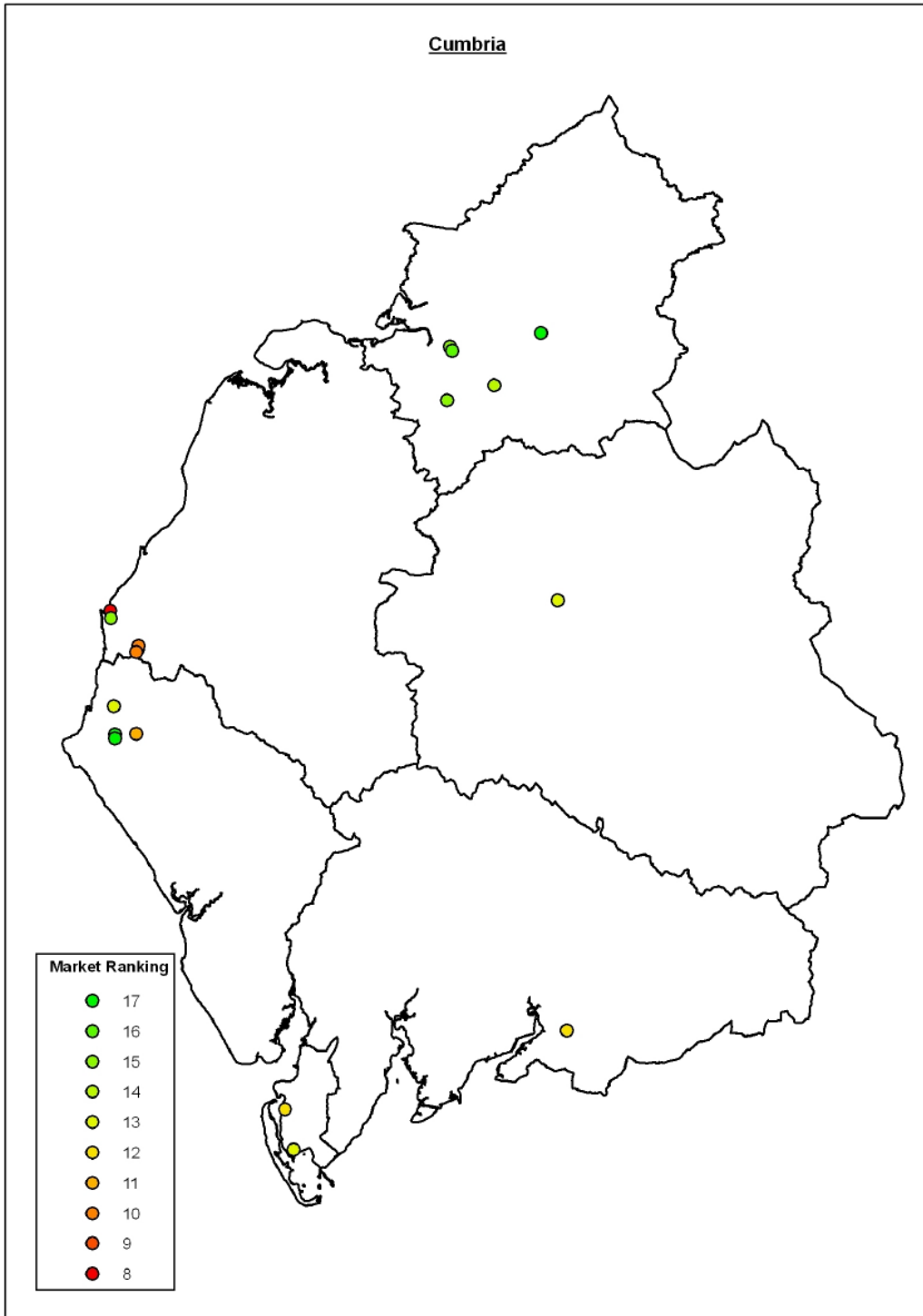
Source: Arup

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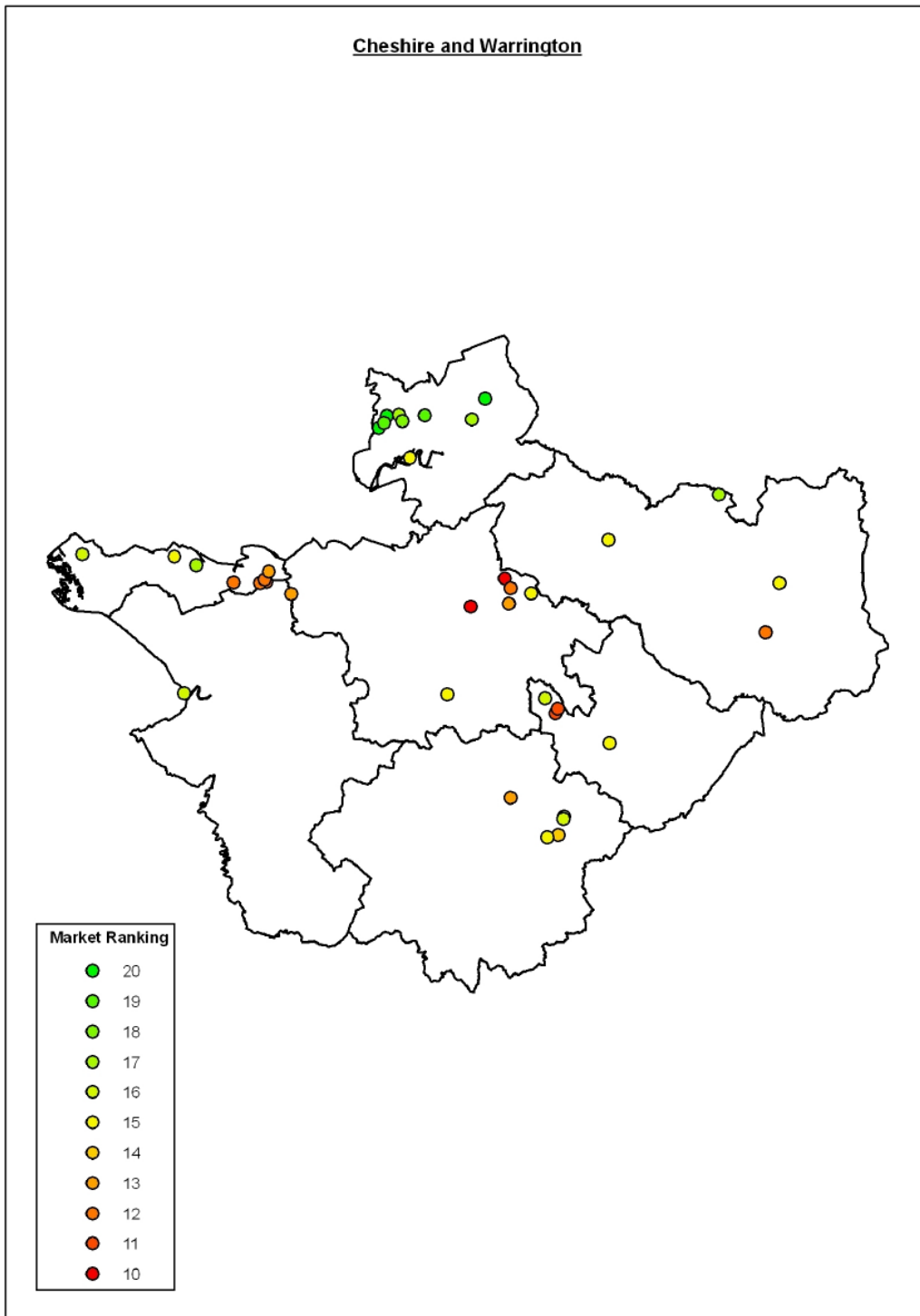
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Figure 4.2 Market ranking for Cumbria



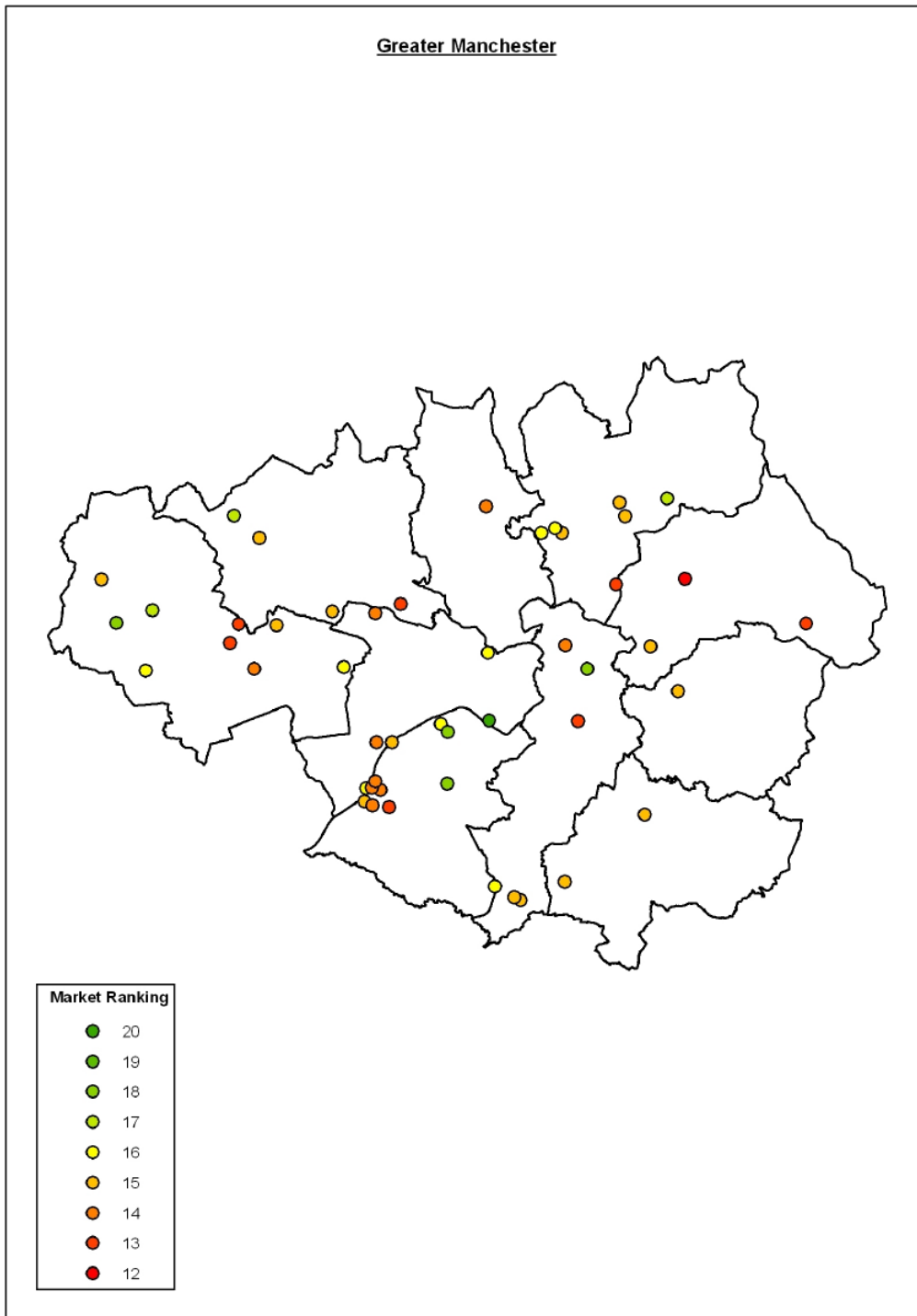
Source: Arup

Figure 4.3 Market ranking for Cheshire and Warrington



Source: Arup

Figure 4.4 Market Ranking for Greater Manchester



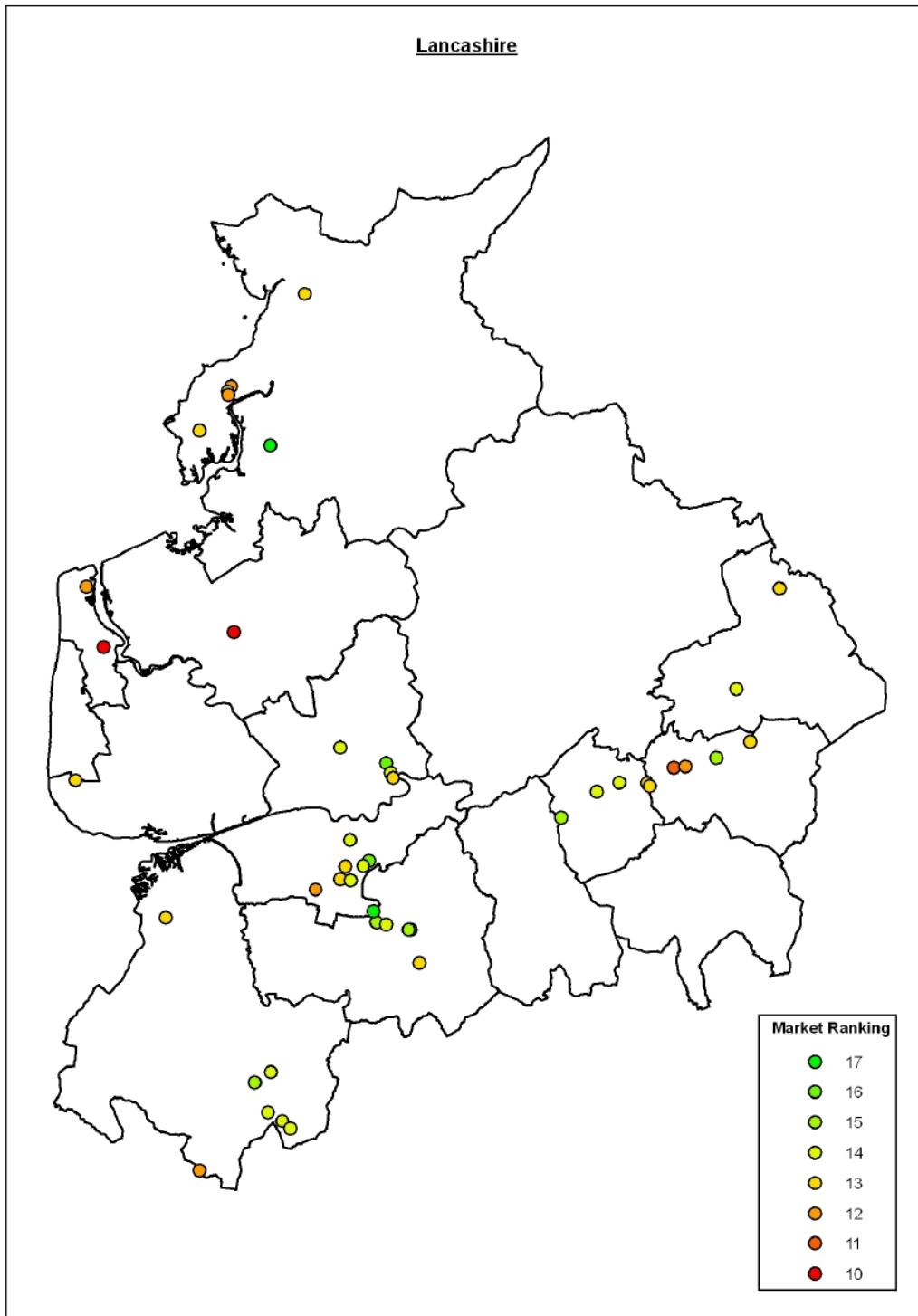
Source: Arup

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Figure 4.5 Market ranking for Lancashire



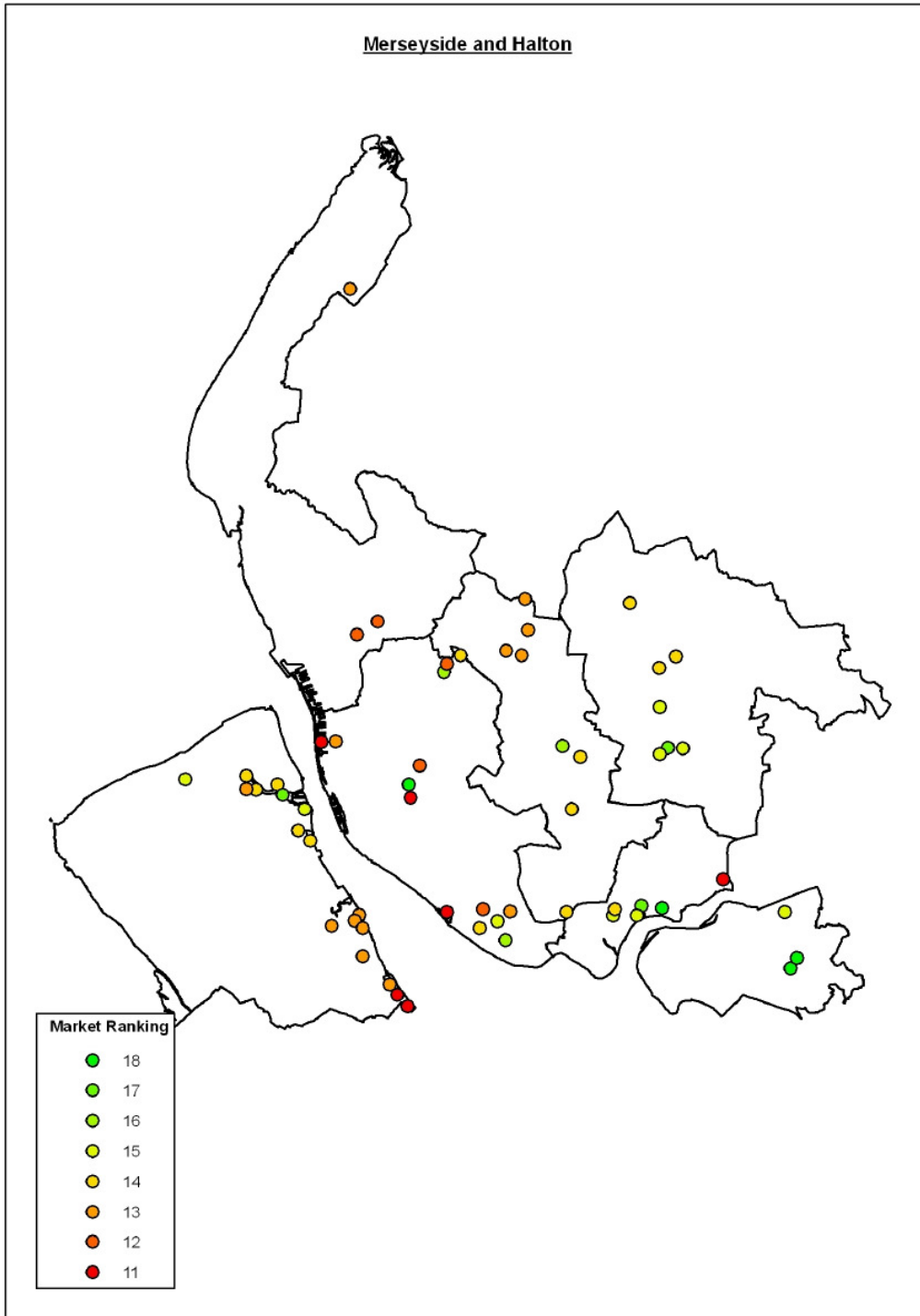
Source: Arup

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Figure 4.6 Market ranking for Merseyside



Source: Arup

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Appendix 1

Individual proforma

Sheet 3: Qualitative Assessment of Committed / Allocated Employment Land Sites					
Local Authority Name -		Site Name	Site Name	Site Name	Site Name
Date					
Officer Name and Telephone Number -					
Site Number					
Availability & Deliverability					
Commercial Viability					
Q1	Market interest in the site for the proposed use and financial viability				
Q2	Ownership Constraints				
Local market conditions					
Q3	Supply of employment land				
Q4	Vacant floorspace in local market				
Q5	Local rents (REGIONAL LEVEL)				
Q6	Local rents (SUB-REGIONAL LEVEL)				
Q7	COMMENTS/POINTS OF NOTE				
Quality of Site and its Internal Environment					
Q8	Contamination Land issues				
Q9	Topographical constraints				
Q10	Utilities and highways infrastructure constraints				
Q11	Broadband access (<i>criterion for B1 office sites only</i>)				
Q12	Quality of the site's internal environment				
Planning Policy and Sustainability					
RSS / RES Compliance					
Q13	Conformity with RSS Objectives and Development Principles				
Q14	Site's position within the RSS Regional Spatial Framework				
Q15	Compliance with RES Vision				
Q16	Extent to which the development of the site is constrained by the amenity considerations of adjacent occupiers				
Q17	Facilities (both existing and potential retail, services etc) within the locality (i.e. 10-15 minutes walk)				

	Strategic access & catchment				
Q18	Public transport accessibility, both existing and proposed (train, tram, bus)				
Q19	Ready access to Motorway				
Q20	Pedestrian / Cycling accessibility to site, both existing and proposed				
Q21	Existing congestion on surrounding road network				
Q22	Easy & appropriate local access for HGVs (<i>criterion for B2/B8 industrial sites only</i>)				
Q23	Proximity to rail freight, sea freight and air freight (<i>criterion for B2/B8 industrial sites only</i>)				
Q24	Density of economically active population in the District				
	Environmental sustainability				
Q25	Previously developed in whole or part				
Q26	Flood Risk				
Q27	Environmental constraints				
	Economic Development				
Q28	Unemployment levels				
Q29	Deprivation in local communities				
Q30	Identified within Regeneration Priority Areas of West Cumbria & Furness or Regeneration area of Blackpool/Morecambe and East Lancashire - (See RSS Key Diagram)				
Q31	Potential availability of 'gap' funding to develop				
	Other Policy considerations				
Q32	If site was de-allocated would there be development interest for non-employment uses?				
Q33	Green Belt				
Q34	Other material policy considerations (<i>to state</i>)				

Sheet 3: Qualitative Assessment of Committed / Allocated Employment Land Sites

Key to Scoring Categories					
	Score 1	Score 2	Score 3	Score 4	Score 5
A1	Very Low	Low	Moderate	High	Very High
A2	Complex site in multiple ownership - probable ransom strips	Several private owners but solveable issues	Some ownership issues but generally unprohibitive	Single owner with no ownership problems	Publicly/Privatey owned site with a willing developer pushing regeneration
A3	Very High supply of sites of a similar quality and type in the locality	High supply of sites of a similar quality and type in the locality	Moderate supply of sites of a similar quality and type in the locality	Low supply of sites of a similar quality and type in the locality	Would represent the only site of its type in the locality
A4	Very High	High	Moderate	Low	Very Low
A5/A6	Very Low	Low	Moderate	High	Very High
A8	Severe land contamination issues	Problematic land contamination issues	Some land remediation required	Slight land remediation required	No land remediation required
A9	Critical topographical constraints	Difficult topographical constraints	Moderate topographical constraints	Slight topographical constraints	No topographical constraints
A10	Very High	High	Moderate	Low	Very Low
A11	No Broadband access and unlikely to come forward in future		No Broadband access but could be economically viable and made available in short-medium term		Broadband access available
A12	Highly unsatisfactory site environment	Poor site environment	Moderate site environment	Good quality site environment	Very good quality site environment
A13	Non-compliance	A Little non-compliance	Neutral compliance	General compliance	Complete compliance
A14	The site is outside an area referred to in RDF1 of RSS				The site is within an area referred to in RDF1 of RSS
A15	Unacceptably high adverse affects for adjacent occupiers	Significant adverse affects for adjacent occupiers	Moderate adverse affects for adjacent occupiers	Slight adverse affects for adjacent occupiers	Amenity of adjacent occupiers unaffected / improved
A16	Unacceptably high adverse affects for adjacent occupiers	Significant adverse affects for adjacent occupiers	Moderate adverse affects for adjacent occupiers	Slight adverse affects for adjacent occupiers	Amenity of adjacent occupiers unaffected / improved
A17	No facilities within 10-15 minute walk	Small shopping parade within 10-15 minute walk	village or local centre within 10-15 minute walk	District/Town Centre within 10-15 minute walk	City Centre within 10-15 minute walk
A18	No Public Transport Routes Nearby	Irregular and infrequent services	Moderate public transport accessibility	Regular services at peak times; most t-t-w areas covered	Excellent variety of routes, at frequent and convenient time intervals
A19	Site over 30 minutes drive from motorway (off peak)	Site around 20-30 minutes drive from motorway (off peak)	Site around 11-20 minutes drive from motorway (off peak)	Site around 5-10 minutes drive from motorway (off peak)	Site located adjacent to motorway
A20	No Pedestrian / Cycle routes nearby	A few unco-ordinated routes that may be unsafe, poorly designed or that do not conveniently link with the main residential areas nearby	Moderate number of basic pedestrian / cycle routes linking site to centres of residence	Good number of co-ordinated routes that link to most of the residential areas nearby and are well designed and safe to use.	Excellent variety and number of routes linking the site to all residential areas in the vicinity, are safe to use, direct and are well designed / maintained
A21	Very High	High	Moderate	Low	Very Low

A22	Critical HGV restrictions / HGV routes through unsuitable areas	Several HGV restrictions and unsuitable routes that can be inconveniently avoided	Moderate HGV restrictions	Occasional routing through unsuitable areas; no restrictions	No diversions or restrictions necessary
A23	Site has no rail links and is located many miles from the major ports and airports of the region	Site is located some way from a rail link / port / airport	Site has reasonable level of access to either a rail link / port / airport	Site is close beside a rail link or a major port or a major airport	Site is immediately adjacent to a rail link and has easy access to a major port and airport
A24	1 per hectare	2 per hectare	5 per hectare	10 per hectare	20 per hectare
A25	100% Greenfield Site	Site predominantly greenfield (more than 70%)	Greenfield/Brownfield roughly 50/50	Site predominantly brownfield (more than 70%)	100% Previously Developed Land
A26	EA Maps suggest area at risk from flooding (1 in 100 or greater)		EA Maps suggest area at remote risk from extreme flooding (1 in 1000)		EA Maps suggest area at no risk from flooding
A27	International designations at the site (i.e. World Heritage Site etc).	National Designations on the site (i.e. SSSI, AONB etc).	Regionally important designations (i.e. regional parks etc).	Local designations (i.e. Local Nature Reserve etc).	No environmental constraints or designations
A28	Very low levels of unemployment in locality	Low levels of unemployment in locality	Moderate levels of unemployment in locality	High levels of unemployment in locality	Very high levels of unemployment in locality
A29	Located in SOA in top 20% least deprived in country	20-40% least deprived	40%-60% least deprived	20-40% most deprived	Located in SOA in top 20% most deprived in country
A30	The site is not in an area of Economic Assistance	The site is within an Enterprise Grant Area only	The site is designated an Economic Assistance Transitional Area	The site is designated an Objective 2 Area	The site is designated an Objective 1 Area
A31	No Gap funding likely to be available				Gap funding likely to be available
A32	Several alternative uses (compliant in policy terms) and high pressure for such uses to come forward	Firm pressure for alternative uses	Possible alternative uses	Few alternative uses likely to come forward	No alternative use likely to be found / alternatives would conflict strongly with policy considerations
A33	Site is Located in a Green Belt		Site is a major developed site within the green belt		Site is not located within a Green Belt
A34	Site seriously conflicts with a material policy consideration	Some level of conflict with a material policy consideration	Site has a neutral impact on a material policy consideration	Site is slightly in accordance with a material policy consideration	Site is fully in accordance with a material policy consideration