



**Parc Cenedlaethol
Arfordir Penfro**

**Pembrokeshire Coast
National Park**

EMPLOYMENT SURVEY REPORT, 2016
October, 2016

PEMBROKESHIRE COUNTY COUNCIL

AND

PEMBROKESHIRE COAST NATIONAL PARK AUTHORITY

Employment Survey Report, 2016

Contents

<i>Chapter</i>	<i>Title</i>	<i>Page</i>
1	Introduction	3
2	Methodology	3
3	Overview of changes 2013-2016 and summary of the 2016 results (where comparative data isn't available)	5
4	Area based results	8
5	Pembroke and Pembroke Dock area	11
6	Milford Haven and Waterston area	14
7	Haverfordwest and Merlins Bridge area	17
8	Fishguard and Goodwick area, including Scleddau and Trecwn	20
9	Neyland area	23
10	Narberth area	26
11	Other locations in the Council's planning area	29
12	National Park sites	32
13	Small sites – windfall employment sites of less than 5,000 square metres (0.5 hectares)	34
14	Spreadsheet of results	34 / Annex A
15	Maps	34 / Annex B

Employment Survey Report, 2016

1 Introduction

1.1 The Council has carried out employment surveys on a bi-annual basis since 2003, the last of which was for 2015. From 2015, these surveys have increased in frequency to yearly. From 2016, sites in the Pembrokeshire Coast National Park have also been included.

1.2 For the 2015 survey, the methodology was comprehensively reviewed. The new approach has also been used for the 2016 survey. The purpose of the review was to bring survey work into conformity with the latest Welsh Government planning advice. In particular, it is a reflection of the requirements of:

- The current edition of Planning Policy Wales;
- Technical Advice Wales 23 on Economic Development; and
- Practice Guidance on Building an Economic Development Evidence Base to Support a Local Development Plan.

1.3 The baseline for the new survey methodology is 2013. This date coincides with the adoption date of the Council's Local Development Plan (LDP). National Park sites appear for the first time in 2016. For each survey year, the position set out is that for the 1st April in that year.

1.4 The new survey methodology is outlined below.

1.5 For the purposes of this report, employment land uses are taken to include those in Use Classes B1, B2, B8, A2 (offices) and sui generis uses that very closely relate to the B Class uses.

2 Methodology

2.1 The 2016 employment survey covers:

- All County Council LDP employment and mixed use allocations (policies SP 3, GN.5 and GN.7). A marina proposal (policy GN.21) with an employment element is also included.
- All existing employment sites listed in the Council's Development Sites SPG. This does not cover all such sites, but includes the main ones. The list of sites is periodically reviewed.
- Windfall employment sites of more than 0.5 hectares in the Council's planning area, where permitted since adoption of the Council's LDP and where not on the Development Sites SPG existing sites list.
- The main employment sites in the National Park, nominated for inclusion by the National Park Authority.

Employment Survey Report, 2016

- 2.2 Small sites in the Council's planning area (windfall employment sites of less than 0.5 hectares consented since adoption of the Council's LDP) are referenced, but these are not surveyed.
- 2.3 In total 78 sites were surveyed in 2016, of which 72 were in the Council's planning area and 6 in the National Park. The information collected for each of these is:
- The 2013 baseline site area (except for National Park sites and post-2013 windfall sites).
 - The 2015 site area (except for sites newly included for the 2016 survey).
 - The 2016 site area.
 - The 2013 site area in use (except for National Park sites and sites newly included for the 2015 and 2016 surveys).
 - The 2015 site area in use (except for National Park sites and sites newly included for the 2016 survey).
 - The 2016 site area in use.
 - The 2013 vacant land (including buildings) measurement (except for National Park sites and sites newly included for the 2015 and 2016 surveys).
 - The 2015 vacant land (excluding buildings in 2015) measurement (except for National Park sites and sites newly included for the 2016 survey).
 - The 2016 vacant land (excluding buildings) measurement.
 - Buildings and enclosures in use for employment purposes in 2015 (except for National Park sites and sites newly included for the 2016 survey).
 - Buildings and enclosures in use for employment purposes in 2016.
 - Buildings and enclosures in use for other purposes within an employment site in 2015 (except for National Park sites and sites newly included for the 2016 survey).
(This covers land areas that are not being used for purposes which are within use classes B1, B2, B8 or A2 or for sui generis uses very closely related to the B class employment uses).
 - Buildings and enclosures in use for other purposes within an employment site in 2016.
(See explanation immediately above).
 - Buildings not in use 2015 (except for National Park sites and sites newly included for the 2016 survey).
 - Buildings not in use in 2016.
 - Vacant, undeveloped, land within each employment site in 2015 (except for National Park sites and sites newly included for the 2016 survey).
 - Vacant, undeveloped, land within each employment site in 2016.

Employment Survey Report, 2016

- Land used for infrastructure and landscaping or likely to be difficult to develop in 2015 (except for National Park sites and sites newly included for the 2016 survey).

(This includes shared infrastructure such as roads and car parking. It also covers landscaped areas and land unlikely to be amenable for development, perhaps because of steep topography or poor access).

- Land used for infrastructure and landscaping or likely to be difficult to develop in 2016.
(See explanation immediately above).
- For land in use in 2015 and 2016, there is an area-based break-down into the component land uses. The categories are use classes B1, B2, B8, A2 and 'Other'.
- Where a site was being advertised for sale in 2015 and / or 2016, this is recorded.
- Sites within the Haven Waterway Enterprise Zone are identified.
- For sites in the Council's planning area, planning application reference numbers are recorded for employment and non-employment planning permissions.

2.4 Area measurements are recorded in square metres. These can be converted into hectares by dividing by 10,000.

2.5 A results table recording the full results from the 2016 survey has been prepared (Annex A to this report).

3 Overview of changes 2013-2016 and summary of the 2016 results (where comparative data isn't available)

3.1 The total site area of land identified for employment purposes (permitted, allocated or built) in 2013 (the baseline position) was 11,373,700 square metres (1137.37 hectares). This excludes National Park sites. This slightly increased, to 11,461,982 square metres (1146.20 hectares), in 2015 (this figure also excluding National Park sites). In 2016, the figure further increased, to 11,953,357 square metres (1195.34 hectares), plus 851,031 square metres in the National Park (85.10 hectares).

3.2 The site area in use in 2013 was 9,448,700 square metres (944.87 hectares). This excludes National Park sites. This fell to 8,294,777 square metres (829.48 hectares) in 2015, which was mainly attributable to the closure of the Murco (Milford Haven) Refinery. The 2015 figure also excludes National Park sites. In 2016, the figure increased to 9,764,952 square metres (976.50 hectares), plus 810,220 square metres (81.02 hectares) in the National Park. A significant element of the 2016 increase relates to the return to use of part of the former Murco (Milford Haven) Refinery, which is now a petro-chemical storage facility for Puma Energy.

3.3 Vacant land (including buildings) in 2013 was 1,925,000 square metres (192.50 hectares). This excludes National Park sites. For 2015 and 2016, a comparison figure with that for 2013 is achieved by combining the vacant land excluding buildings figures with those for buildings not in use. In 2015, the former was 1,887,731 square metres (188.78 hectares) and the latter 1,279,474 square metres (127.95 hectares). The combined total is 3,167,205 square metres (316.72 hectares). These figures exclude National Park sites. The substantial increase in vacant land and buildings between 2013 and 2015 largely relates to closure of the Murco (Milford Haven) Refinery. In 2016, the vacant land excluding buildings figure increased to 2,007,283 square metres (200.73 hectares) but the buildings not in use figure reduced to 181,122 square metres. The combined total is 2,178,185 square metres (217.82 hectares), a significant reduction in comparison with the 2015 figure. This reflects the return to use of a sizeable part of the former Murco (Milford Haven) Refinery site as a petro-chemical storage facility. To these figures can be added the National Park component, where the vacant land excluding buildings total is 40,149.14 square metres (4.01 hectares) and the buildings not in use figure is 661.39 square metres (0.07 hectares), giving a combined total of 40,810.53 square metres (4.08 hectares).

3.4 In 2016, the geographical distribution of the vacant land excluding buildings and buildings not in use (in combination and for Council and National Park sites together) was as follows:

- Pembroke and Pembroke Dock – 15.12%;
- Milford Haven and Waterston – 29.00%;
- Haverfordwest and Merlins Bridge – 19.97%;
- Fishguard, Goodwick, Scleddau and Trecwn – 16.37%;
- Neyland – 5.02%;
- Narberth – 0.69%;
- Other locations within the Council's planning area – 11.99%; and
- National Park sites – 1.84%.

Employment Survey Report, 2016

- 3.5 Buildings / enclosures in use for employment purposes in 2015 covered 5,382,386 square metres (538.24 hectares). Those in use for non-employment purposes covered 2,292,491 square metres (229.25 hectares). Much of the latter relates to uses closely related to those in the employment use classes (B1, B2 and B8), but which are considered to be sui generis (in a class of their own). These figures are for sites in the Council's planning area only. In 2016, buildings / enclosures in use for employment purposes covered 6,994,808 square metres (699.48 hectares) in the Council's planning area, plus 795,228 square metres (79.52 hectares) in the National Park. Also in 2016, buildings / enclosures in use for non-employment purposes covered 2,210,341 square metres in the Council's planning area, plus 2,515 square metres (0.25 hectares) in the National Park.
- 3.6 Land used for infrastructure, landscaping or otherwise considered to be difficult to develop accounted for 619,900 square metres (61.99 hectares) in 2015. This figure is for sites in the Council's planning area only. In 2016, this figure for PCC's planning area is 559,800 square metres (55.98 hectares) and there is an additional 12,476 square metres (1.25 hectares) in the National Park. Land in this category is not included in the figures for vacant land excluding buildings or buildings not in use.
- 3.7 For land in use, the areas used for different land use classes were as follows in 2015 (these figures are for the Council's planning area only):
- Class B1 – 119,593 square metres (11.96 hectares) (1.56% of total);
 - Class B2 – 3,662,725 square metres (366.27 hectares) (47.72% of total);
 - Class B8 – 1,599,310 square metres (159.93 hectares) (20.84% of total);
 - Class A2 – 758 square metres (0.08 hectares) (0.01% of total); and
 - Other – 2,292,491 square metres (229.25 hectares) (29.87% of total).

The comparable figures for 2016 in the Council's planning area are as follows:

- Class B1 – 39,362 square metres (3.94 hectares) (0.43% of total);
- Class B2 – 2,594,071 square metres (259.41 hectares) (28.18% of total);
- Class B8 – 4,360,958 square metres (436.10 hectares) (47.37% of total);
- Class A2 – 418 square metres (0.04 hectares) (0.01% of total); and
- Other – 2,210,341 square metres (221.03 hectares) (24.01% of total).

For sites in the National Park, the figures for 2016 are as follows:

- Class B1 – 7,615.38 square metres (0.76 hectares) (0.95% of total);
- Class B2 – 781750.26 square metres (78.18 hectares) (97.99% of total);
- Class B8 – 5488.82 square metres (0.55 hectares) (0.69% of total);
- Class A2 – 373.75 square metres (0.04 hectares) (0.05% of total); and
- Other – 2515.16 square metres (0.25 hectares) (0.32% of total).

Employment Survey Report, 2016

3.8 The high percentages for B2, B8 and 'Other' uses in the Council's planning area, and for B2 uses in the National Park, are to a significant extent related to the concentration of major industrial sites along the Milford Haven Waterway.

4 Area-based results

4.1 Locations in the Pembroke Dock / Pembroke and Milford Haven / Waterston areas make the biggest contributions to site area totals. This is mainly because they include the major industrial sites adjoining the Milford Haven Waterway.

4.2 The table below presents this information for 2013, 2015 and 2016:

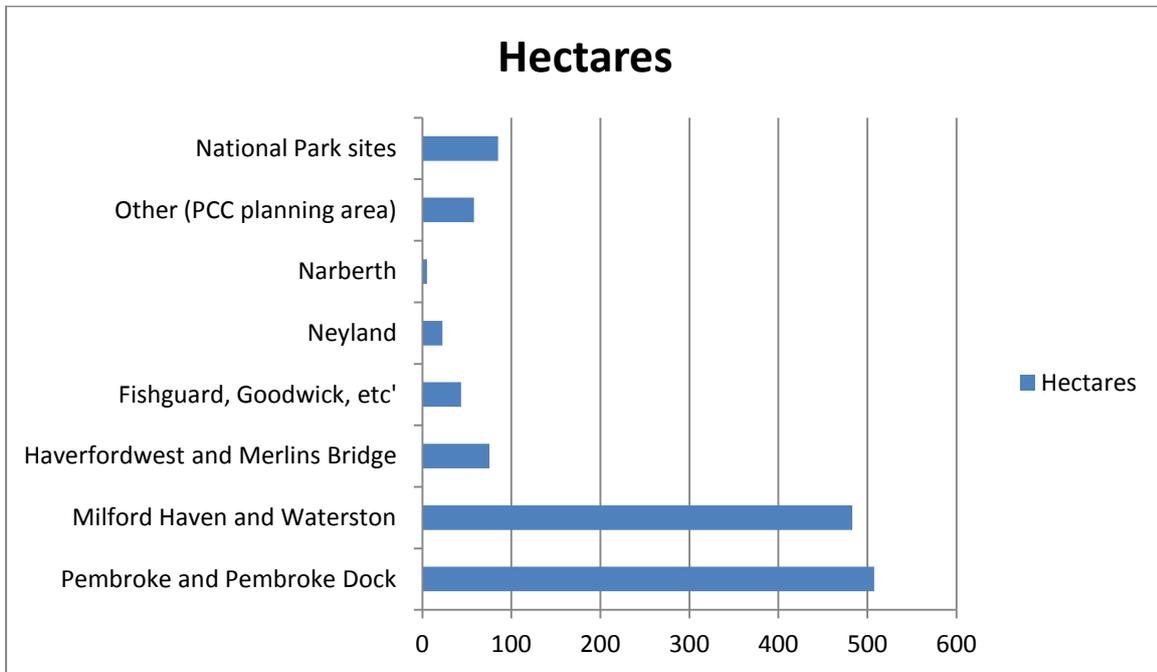
Table showing total area of employment land (developed and undeveloped), by location, in 2013, 2015 and 2016

<u>Location</u>	<u>2013 total area (square metres)</u>	<u>2013%</u>	<u>2015 total area (square metres)</u>	<u>2015%</u>	<u>2016 total area (square metres)</u>	<u>2016 %</u>
Pembroke and Pembroke Dock area	5,027,100	44.20	5,027,090	43.86	5,076,930	39.64
Milford Haven and Waterston area	4,501,000	39.57	4,492,605	39.20	4,828,341	37.71
Haverfordwest and Merlins Bridge area	685,300	6.03	698,444	6.09	751,913	5.87
Fishguard and Goodwick area, including Scleddau and Trecwn	433,800	3.81	436,613	3.81	435,407	3.40
Neyland area	225,600	1.98	225,630	1.97	226,540	1.77
Narberth area	46,500	0.41	46,392	0.40	53,456	0.42
Other locations in the Council's planning area	454,400	4.00	535,188	4.67	580,770	4.54
National Park sites					851,031	6.65
Totals	11,373,700	100	11,461,982	100	12,804,388	100

(Note: the 2013 and 2015 % figures do not take account of National Park sites)

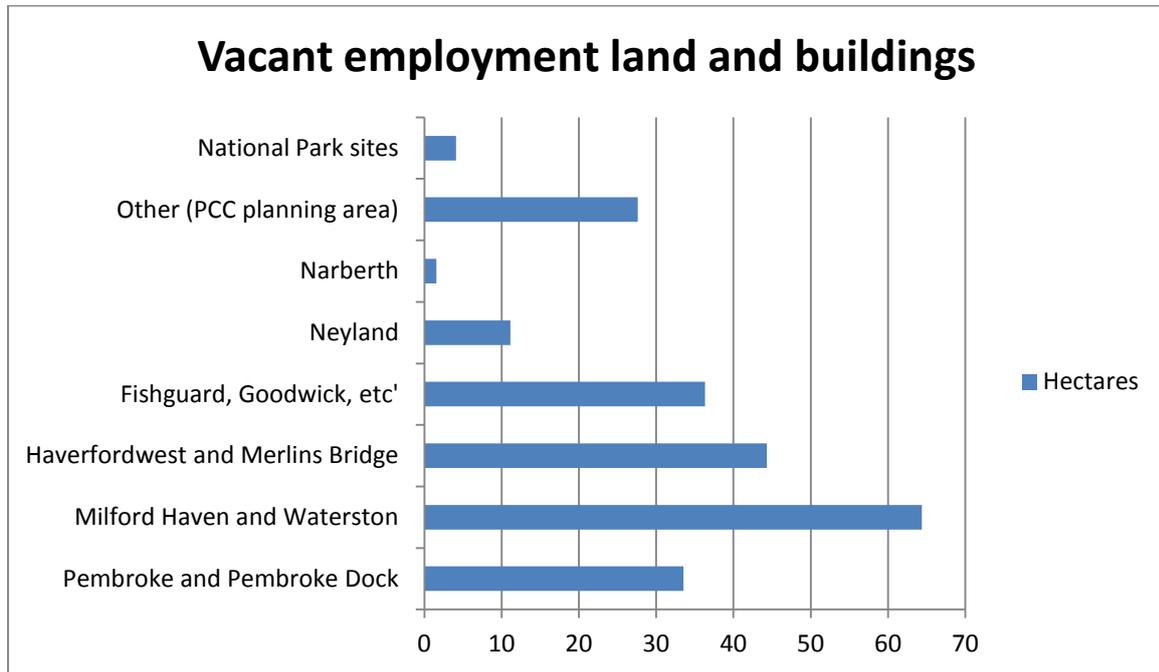
4.3 The total site areas have not changed significantly between the three survey dates. The introduction of National Park sites in 2016 has slightly reduced the percentage figures for Pembroke and Pembroke Dock and Milford Haven and Waterston, but these areas still dominate the provision. National Park sites account for just over 6½% of the total in 2016.

Bar chart showing hectares of employment land by location (2016)



4.4 It can be seen clearly that sites in Milford Haven / Waterston and Pembroke / Pembroke Dock dominate provision. Most of the major industrial installations of the Haven Waterway are located here. Part of the South Hook LNG facility is within the National Park and this is the main element of employment land provision in the National Park.

Bar chart showing hectares of vacant employment land excluding buildings and employment buildings not in use (in combination) by location, 2016



4.5 Milford Haven and Waterston have the greatest supply of vacant land and buildings. However, this has reduced significantly in comparison to the 2015 position, due to part of the Murco (Milford Haven) Refinery Site coming back into use.

Employment Survey Report, 2016

5 Pembroke and Pembroke Dock area

Summary table

	Square metres	Hectares
2013 total site area	5,027,100	502.71
2015 total site area	5,027,090	502.71
2016 total site area	5,076,930	507.69
Change in total site area between 2013 and 2015	-10	0
Change in total site area between 2015 and 2016	+49,840	+4.98
2013 site area in use	4,644,200	464.42
2015 site area in use	4,718,546	471.85
2016 site area in use	4,741,374	474.14
Change in site area in use between 2013 and 2015	+74,346	+7.43
Change in site area in use between 2015 and 2016	+22,828	+2.28
2013 vacant area including buildings	382,900	38.29
2015 vacant area excluding buildings	288,296	28.83
2016 vacant area excluding buildings	317,236	31.72
2015 buildings not in use	20,248	2.02
2016 buildings not in use	18,320	1.83
Change in vacant land and not-in-use buildings between 2013 and 2015	-74,356	-7.44
Change in vacant land and not-in-use buildings between 2015 and 2016	+27012	+2.70

Employment Survey Report, 2016

5.1 The table above indicates a 7.43 hectare increase in the amount of land in use for employment purposes between 2013 and 2015, followed by a further increase of 2.28 hectares between 2015 and 2016. There was also a 7.44 hectare reduction in vacant land and buildings not-in-use between 2013 and 2015, followed by an increase of 2.70 hectares between 2015 and 2016.

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	5,076,930	507.69
Buildings / enclosures in use for employment purposes	2,451,246	245.12 (48.28% of total)
Buildings / enclosures in use for other purposes	2,069,489	206.95 (40.76% of total)
Buildings not in use	18,320	1.83 (0.36% of total)
Vacant, undeveloped	317,236	31.72 (6.25% of total)
Infrastructure, landscaping and difficult to develop land	220,637	22.06 (4.35% of total)

5.2 The table above demonstrates that about 48% of the available land was in use for employment purposes. Approximately 41% was in use for other purposes. This mainly reflects the classification of the Power Station as a sui generis use, rather than a B Class use. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for just over 6% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just over 4% of the total.

Employment Survey Report, 2016

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	2,451,246	245.12
B1	15,775	1.58 (0.64% of total)
B2	1,215,866	121.59 (49.60% of total)
B8	1,219,606	121.96 (49.76% of total)
A2	0	0 (0% of total)

5.3 The table above confirms that the vast majority of in-use employment land in the Pembroke / Pembroke Dock area is in classes B2 (general industrial) and B8 (distribution and storage).

5.4 Of the 9 sites surveyed in 2016, 2 included land being advertised for sale.

Employment Survey Report, 2016

6 Milford Haven and Waterston area

Summary table

	Square metres	Hectares
2013 total site area	4,501,000	450.10
2015 total site area	4,492,625	449.26
2016 total site area	4,828,341	482.83
Change in total site area between 2013 and 2015	- 8,375	- 0.84
Change in total site area between 2015 and 2016	+335,716	+33.57
2013 site area in use	3,984,800	398.48
2015 site area in use	2,719,948	271.99
2016 site area in use	4,184,740	418.47
Change in site area in use between 2013 and 2015	-1,264,852	-126.49
Change in site area in use between 2015 and 2016	+1,464,792	+146.47
2013 vacant area including buildings	516,200	51.62
2015 vacant area excluding buildings	528,937	52.89
2016 vacant area excluding buildings	525,460	52.55
2015 buildings not in use	1,243,740	124.37
2016 buildings not in use	118,141	11.81
Change in vacant land and not-in-use buildings between 2013 and 2015	+1,256,477	+125.65
Change in vacant land and not-in-use buildings between 2015 and 2016	-1,129,076	-112.91

Employment Survey Report, 2016

6.1 The table above indicates a significant reduction in the amount of land in use for employment purposes between 2013 and 2015, followed by a substantial increase between 2015 and 2016. There was a consequential increase in vacant land and buildings not-in-use between 2013 and 2015, followed by a reduction between 2015 and 2016. These changes were primarily a consequence of the closure of the Milford Haven (Murco) Refinery and the subsequent re-use of a substantial proportion of the site for petro-chemical storage purposes by Puma Energy.

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	4,828,341	482.83
Buildings / enclosures in use for employment purposes	4,019,675	401.97 (83.25% of total)
Buildings / enclosures in use for other purposes	37,070	3.71 (0.77% of total)
Buildings not in use	118,141	11.81 (2.45% of total)
Vacant, undeveloped	525,460	52.54 (10.88% of total)
Infrastructure, landscaping and difficult to develop land	127,994	12.80 (2.65% of total)

6.2 The table above demonstrates that slightly more than 83% of the available land was in use for employment purposes. Less than 1% was in use for other purposes. Buildings not in use represent slightly less than 2½% of the total. Vacant, undeveloped land accounted for slightly below 11% of the total. Infrastructure, landscaping and ‘difficult to develop’ land accounted for just over 2½% of the total.

Employment Survey Report, 2016

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	4,019,675	401.97
B1	7,431	0.74 (0.18% of total)
B2	1,231,101	123.11 (30.63% of total)
B8	2,781,143	278.11 (69.19% of total)
A2	0	0 (0% of total)

6.3 The table above confirms that most in-use employment land in the Milford Haven / Waterston area is in classes B2 (general industrial) and B8 (distribution and storage). The B8 uses now dominate, contributing just over 69% of the total.

6.4 Of the 12 sites surveyed in 2016, 3 included land being advertised for sale.

Employment Survey Report, 2016

7 Haverfordwest and Merlins Bridge area

Summary table

	Square metres	Hectares
2013 total site area	685,300	68.53
2015 total site area	698,444	69.84
2016 total site area	751,913	75.19
Change in total site area between 2013 and 2015	+13,144	+1.31
Change in total site area between 2015 and 2016	+53,469	+5.35
2013 site area in use	260,700	26.07
2015 site area in use	279,696	27.97
2016 site area in use	308,952	30.90
Change in site area in use between 2013 and 2015	+18,996	+1.90
Change in site area in use between 2015 and 2016	+29,256	+2.93
2013 vacant area including buildings	424,600	42.46
2015 vacant area excluding buildings	416,351	41.64
2016 vacant area excluding buildings	437,318	43.73
2015 buildings not in use	2,397	0.24
2016 buildings not in use	5,843	0.58
Change in vacant land and not-in-use buildings between 2013 and 2015	-5,852	-0.59
Change in vacant land and not-in-use buildings between 2015 and 2016	+24,413	+2.44

Employment Survey Report, 2016

7.1 The table above indicates slight increases in the amount of land in use for employment purposes between 2013 and 2015 and again between 2015 and 2016. There was a slight reduction in vacant land and buildings not-in-use between 2013 and 2015, followed by a modest increase between 2015 and 2016.

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	751,913	75.19
Buildings / enclosures in use for employment purposes	202,456	20.25 (26.92% of total)
Buildings / enclosures in use for other purposes	50,981	5.10 (6.78% of total)
Buildings not in use	5,843	0.58 (0.77% of total)
Vacant, undeveloped	437,318	43.73 (58.15% of total)
Infrastructure, landscaping and difficult to develop land	55,514	5.55 (7.38% of total)

7.2 The table above demonstrates that slightly less than 27% of the available land was in use for employment purposes. Just below 7% was in use for other purposes. Buildings not in use represented an insignificant proportion of the total. 58% of the available land was vacant and undeveloped. However, overall land areas involved are much smaller than, for example, in Milford Haven. The vacant and undeveloped land in Haverfordwest and Merlins Bridge totals 43.73 hectares. This compares with 52.54 hectares in Milford Haven and Waterston (just below 11% of the total site area for those settlements). Infrastructure, landscaping and 'difficult to develop' land made up just over 7% of the total.

Employment Survey Report, 2016

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	202,456	20.25
B1	6,885	0.69 (3.41% of total)
B2	52,087	5.21 (25.73% of total)
B8	143,484	14.35 (70.86% of total)
A2	0	0

7.3 The table above confirms that most in-use employment land in the Haverfordwest and Merlins Bridge area is in classes B2 (general industrial) and B8 (distribution and storage). B8 uses now dominate, accounting for slightly less than 71% of the total.

7.4 Of the 14 sites surveyed in 2016, 5 included land being advertised for sale.

Employment Survey Report, 2016

8 Fishguard and Goodwick, including Scleddau and Trecwn, area

Summary table

	Square metres	Hectares
2013 total site area	433,800	43.38
2015 total site area	436,613	43.66
2016 total site area	435,407	43.54
Change in total site area between 2013 and 2015	+2,813	+0.28
Change in total site area between 2015 and 2016	-1,206	-0.12
2013 site area in use	146,700	14.67
2015 site area in use	92,070	9.21
2016 site area in use	72,190	7.22
Change in site area in use between 2013 and 2015	-54,630	-5.46
Change in site area in use between 2015 and 2016	-19,880	-1.99
2013 vacant area including buildings	287,100	28.71
2015 vacant area excluding buildings	341,865	34.19
2016 vacant area excluding buildings	341,200	34.12
2015 buildings not in use	2,678	0.27
2016 buildings not in use	22,017	2.20
Change in vacant land and not-in-use buildings between 2013 and 2015	+57,443	+5.74
Change in vacant land and not-in-use buildings between 2015 and 2016	+18,674	+1.87

Employment Survey Report, 2016

8.1 The table above indicates a 5.46 hectare reduction in the amount of land in use for employment purposes between 2013 and 2015. It also shows a further reduction of 1.99 hectares between 2015 and 2016. There were increases, of broadly similar proportions, in vacant land and buildings not-in-use over the same time periods.

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	435,407	43.54
Buildings / enclosures in use for employment purposes	60,631	6.06 (13.92% of total)
Buildings / enclosures in use for other purposes	6,539	0.66 (1.52% of total)
Buildings not in use	22,017	2.20 (5.05% of total)
Vacant, undeveloped	341,200	34.12 (78.36% of total)
Infrastructure, landscaping and difficult to develop land	5,020	0.50 (1.15% of total)

8.2 The table above demonstrates that slightly less than 14% of the available land was in use for employment purposes. A further 1.52% was in use for other purposes. This indicates a low proportion of the available land being in use at the survey date. Buildings not in use represented about 5% of the total. Vacant, undeveloped land accounted for just over 78% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just over 1% of the total.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	60,631	6.06
B1	1,859	0.18 (2.97% of total)
B2	5,482	0.55 (9.08% of total)
B8	53,290	5.33 (87.95% of total)
A2	0	0

Employment Survey Report, 2016

- 8.3 The table above confirms that most in-use employment land in the Fishguard and Goodwick, including Scleddau and Trecwn, area is in class B8 (distribution and storage). B8 uses account for slightly less than 88% of the total, with a further 9% being in use class B2 (general industrial).
- 8.4 Of the 8 sites surveyed in 2016, 3 included land being advertised for sale.

Employment Survey Report, 2016

9 Neyland area

Summary table

	Square metres	Hectares
2013 total site area	225,600	22.56
2015 total site area	225,630	22.56
2016 total site area	226,540	22.65
Change in total site area between 2013 and 2015	+30	0
Change in total site area between 2015 and 2016	+910	+0.09
2013 site area in use	123,200	12.32
2015 site area in use	113,593	11.36
2016 site area in use	115,186	11.52
Change in site area in use between 2013 and 2015	-9,607	-0.96
Change in site area in use between 2015 and 2016	+1,593	+0.16
2013 vacant area including buildings	102,400	10.24
2015 vacant area excluding buildings	109,192	10.92
2016 vacant area excluding buildings	102,764	10.28
2015 buildings not in use	2,845	0.28
2016 buildings not in use	8,590	0.86
Change in vacant land and not-in-use buildings between 2013 and 2015	+9,637	+0.96
Change in vacant land and not-in-use buildings between 2015 and 2016	+7907	+0.79

Employment Survey Report, 2016

9.1 The table above indicates a modest reduction in the amount of land in use for employment purposes between 2013 and 2015. It also shows a very small increase in this amount between 2015 and 2016. There was also a slight increase in vacant land and buildings not-in-use, both for 2013 to 2015 and 2015 to 2016.

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	226,540	22.65
Buildings / enclosures in use for employment purposes	36,863	3.68 (16.24% of total)
Buildings / enclosures in use for other purposes	14,307	1.43 (6.31% of total)
Buildings not in use	8,590	0.86 (3.80% of total)
Vacant, undeveloped	102,764	10.28 (45.39% of total)
Infrastructure, landscaping and difficult to develop land	64,016	6.40 (28.26% of total)

9.2 The table above demonstrates that slightly over 16% of the available land was in use for employment purposes. About 6% was in use for other purposes. This indicates a low proportion of the available land being in use at the survey date. Buildings not in use represented just below 4% the total. Vacant, undeveloped land accounted for slightly over 45% of the total, although the total land area involved is modest, at only 10.28ha. Infrastructure, landscaping and 'difficult to develop' land made up slightly more than 28% of the total.

Employment Survey Report, 2016

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	36,863	3.69
B1	4,347	0.43 (11.65% of total)
B2	13,755	1.38 (37.40% of total)
B8	18,760	1.88 (50.95% of total)
A2	0	0

9.3 The table above confirms that more than half of the in-use employment land in the Neyland area is in class B8 (distribution and storage). Of the remainder, just over 37% is in use class B2 (general industrial) and slightly less than 12% in use class B1 (offices, research and development and light industry).

9.4 Of the 3 sites surveyed in 2016, 1 included land being advertised for sale.

Employment Survey Report, 2016

10 Narberth area

Summary table

	Square metres	Hectares
2013 total site area	46,500	4.65
2015 total site area	46,392	4.64
2016 total site area	53,456	5.35
Change in total site area between 2013 and 2015	-108	-0.01
Change in total site area between 2015 and 2016	+7,064	+0.71
2013 site area in use	31,400	3.14
2015 site area in use	30,238	3.02
2016 site area in use	38,070	3.81
Change in site area in use between 2013 and 2015	-1,162	-0.12
Change in site area in use between 2015 and 2016	+7832	+0.78
2013 vacant area including buildings	15,100	1.51
2015 vacant area excluding buildings	15,750	1.58
2016 vacant area excluding buildings	15,251	1.53
2015 buildings not in use	405	0.04
2016 buildings not in use	134	0.01
Change in vacant land and not-in-use buildings between 2013 and 2015	+1,055	+0.11
Change in vacant land and not-in-use buildings between 2015 and 2016	-770	-0.08

Employment Survey Report, 2016

10.1 The table above indicates a slight reduction in the amount of land in use for employment purposes between 2013 and 2015. This was followed by a larger increase in this amount between 2015 and 2016. There was a small increase in vacant land and buildings not-in-use between 2013 and 2015. However, between 2015 and 2016, there was a slight reduction in this amount.

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	53,456	5.35
Buildings / enclosures in use for employment purposes	21,710	2.17 (40.56% of total)
Buildings / enclosures in use for other purposes	4,581	0.46 (8.60% of total)
Buildings not in use	134	0.01 (0.19% of total)
Vacant, undeveloped	15,251	1.53 (28.59% of total)
Infrastructure, landscaping and difficult to develop land	11,780	1.18 (22.06% of total)

10.2 The table above demonstrates that just over 40% of the available land was in use for employment purposes. Slightly more than 8% was in use for other purposes. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for slightly less than 29% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just over 22% of the total.

Employment Survey Report, 2016

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	21,710	2.17
B1	129	0.01 (0.46% of total)
B2	9,563	0.96 (44.24% of total)
B8	12,018	1.20 (55.30% of total)
A2	0	0

10.3 The table above confirms that just over 55% of in-use employment land in the Narberth area is in use class B8 (distribution and storage). A further 44% is in use class B2 (general industrial). There is also a very small use class B1 provision.

10.4 Of the 4 sites surveyed in 2016, none included land being advertised for sale.

Employment Survey Report, 2016

11 Other locations in the Council's planning area

Summary table

	Square metres	Hectares
2013 total site area	454,400	45.44
2015 total site area	535,188	53.52
2016 total site area	580,770	58.08
Change in total site area between 2013 and 2015	+80,788	+8.08
Change in total site area between 2015 and 2016	+45,582	+4.56
2013 site area in use	257,700	25.77
2015 site area in use	340,688	34.07
2016 site area in use	304,439	30.44
Change in site area in use between 2013 and 2015	+82,988	+8.30
Change in site area in use between 2015 and 2016	-36,249	-3.62
2013 vacant area including buildings	196,700	19.67
2015 vacant area excluding buildings	187,340	18.73
2016 vacant area excluding buildings	268,054	26.81
2015 buildings not in use	7,160	0.72
2016 buildings not in use	8,277	0.83
Change in vacant land and not-in-use buildings between 2013 and 2015	-2,200	-0.22
Change in vacant land and not-in-use buildings between 2015 and 2016	+81,831	+8.18

Employment Survey Report, 2016

11.1 The table above indicates an increase in overall site area of just over 8 hectares between 2013 and 2015, and a further increase of just over 4 ½ hectares between 2015 and 2016. There was also an increase of just over 8 hectares in the amount of land in use for employment purposes between 2013 and 2015, followed by a fall in this amount of just over 3 ½ hectares between 2015 and 2016. There was a very small reduction, of 0.22 hectares, in vacant land and buildings not-in-use between 2013 and 2015, but an increase of just over 8 hectares in this amount between 2015 and 2016.

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	580,770	58.08
Buildings / enclosures in use for employment purposes	202,226	20.22 (34.81% of total)
Buildings / enclosures in use for other purposes	27,373	2.74 (4.72% of total)
Buildings not in use	8,277	0.83 (1.43% of total)
Vacant, undeveloped	268,054	26.81 (46.16% of total)
Infrastructure, landscaping and difficult to develop land	74,839	7.48 (12.88% of total)

11.2 The table above demonstrates that just below 35% the available land was in use for employment purposes. A further 4.72% was in use for other purposes. Buildings not in use represent an insignificant proportion of the total. Vacant, undeveloped land accounted for just over 46% of the total. Infrastructure, landscaping and 'difficult to develop' land made up just below 13% of the total.

Employment Survey Report, 2016

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	202,226	20.22
B1	2,936	0.29 (1.43% of total)
B2	66,216	6.62 (32.74% of total)
B8	132,657	13.27 (65.63% of total)
A2	418	0.04 (0.20% of total)

11.3 The table above confirms that most in-use employment land in these areas are in classes B2 (general industrial) and B8 (distribution and storage). B2 use classes account for just under 33% of the total in use employment land. B8 use classes account for just under 66% of the total in use employment land.

11.4 Of the 22 sites surveyed in 2016, none included land being advertised for sale.

Employment Survey Report, 2016

12 National Park sites

Summary table

	Square metres	Hectares
2013 total site area	---	---
2015 total site area	---	---
2016 total site area	851,031	85.10
Change in total site area between 2013 and 2015	---	---
Change in total site area between 2015 and 2016	---	---
2013 site area in use	---	---
2015 site area in use	---	---
2016 site area in use	810,220	81.02
Change in site area in use between 2013 and 2015	---	---
Change in site area in use between 2015 and 2016	---	---
2013 vacant area including buildings	---	---
2015 vacant area excluding buildings	---	---
2016 vacant area excluding buildings	40149	4.01
2015 buildings not in use	---	---
2016 buildings not in use	662	0.07
Change in vacant land and not-in-use buildings between 2013 and 2015	---	---
Change in vacant land and not-in-use buildings between 2015 and 2016	---	---

12.1 As National Park sites were included for the first time in 2016, there is no basis for a comparison with past years.

Employment Survey Report, 2016

Table showing proportions of the total site area within different use and non-use categories, 2016

	Square metres	Hectares
2016 total site area	851,031	85.10
Buildings / enclosures in use for employment purposes	795,228	79.52 (93.45% of total)
Buildings / enclosures in use for other purposes	2,515	0.25 (0.29% of total)
Buildings not in use	662	0.07 (0.08% of total)
Vacant, undeveloped	40,149	4.01 (4.71% of total)
Infrastructure, landscaping and difficult to develop land	12,476	1.25 (1.47% of total)

12.2 The table above demonstrates that just over 93% of the available land was in use for employment purposes. Vacant, undeveloped land accounted for slightly less than 5% of the total. Land in use for other purposes, buildings not in use and infrastructure, landscaping and 'difficult to develop' land accounted for insignificant proportions of the total.

Table showing breakdown of land and buildings used for employment purposes, by use class, 2016

	Square metres	Hectares
Buildings / enclosures in use for employment purposes, 2016	795,228	79.52
B1	7,615	0.76 (0.96% of total)
B2	781,750	78.17 (98.30% of total)
B8	5,489	0.55 (0.69% of total)
A2	374	0.04 (0.05% of total)

12.3 The table above confirms that most in-use employment land in the National Park is in class B2 (general industrial). This is because the South Hook LNG site dominates provision. Other use classes make minimal contributions in comparison with the B2 uses, but nonetheless are important in a local context.

12.4 Of the 6 sites surveyed in 2016, 1 included land being advertised for sale.

Employment Survey Report, 2016

13 Small sites – windfall employment sites of less than 5,000 square metres (0.5 hectares)

13.1 Small sites within the Council's planning area have been recorded on the spreadsheet (Annex A), although these were not surveyed. Such sites in the National Park are not listed.

13.2 There were 44 consented planning applications (plus 1 listed building application) for windfall employment sites within this category between LDP adoption in February 2013 and the end of March 2015. The combined site area for these applications was 38,600 square metres (3.86 hectares). A few sites attracted more than one such application. Hence the contribution made to the employment land bank will be slightly less than the quoted figure.

13.3 There were a further 20 consented planning applications (plus 1 listed building application, 1 certificate of lawful use application and 2 applications for non-material changes to earlier applications) for windfall employment sites within this category between the start of April 2015 and the end of March 2016. The combined site area for these applications was 28,000 square metres (2.8 hectares). As for the 2013-15 figures there is likelihood of some double counting, so the contribution to the employment land bank will be slightly less than the quoted figure.

14 Spreadsheet of Results

14.1 The spreadsheet of results is presented as Annex A to this report.

15 Maps

15.1 Maps have been prepared showing the site boundary of each of the employment sites listed in Annex A. These are presented in a map document, which forms Annex B to this report.

15.2 Maps have not been prepared for the small sites (windfall employment sites of less than 5,000 square metres).