

OCTOBER 2019

# Two County Economic Study for Carmarthenshire and Pembrokeshire

*Appendix C Strategic Sites Review  
Final Issue*



ARUP

# Contents

---

	Page
<b>1 Introduction</b>	<b>1</b>
1.1 Overview	1
1.2 Structure of the Appendix	1
<b>2 Larger than Local Strategic Sites: Refining the Definition</b>	<b>2</b>
2.1 Overview	2
2.2 Larger than Local Study Starting Point: Strategic Sites	2
2.3 Larger than Local: Reviewing the definition of ‘Strategic Sites’	3
<b>3 Larger than Local Strategic Sites: Strategic Site Inventory</b>	<b>7</b>
3.1 Overview	7
3.2 Collating a Strategic Site Inventory: Creating a Long-List	7
3.3 Collating a Strategic Site Inventory: Refining the Long List	8
3.4 Collating a Strategic Site Inventory: Creating the short list	11
<b>4 Larger than Local Strategic Sites: Categorising Sites against the Definitions</b>	<b>13</b>
4.1 Overview	13
4.2 Categorising sites against the definitions	13
4.3 Sites for Further Consideration	16
<b>5 Next Steps</b>	<b>17</b>
5.1 Overview	17
5.2 Policy considerations	17

## Appendix C.1 Strategic Site Proformas

# 1 Introduction

---

## 1.1 Overview

Ove Arup and Partners ('Arup') have been commissioned by Pembrokeshire County Council, Carmarthenshire County Council, Pembrokeshire Coast National Park Authority and Brecon Beacons National Park Authority to undertake a Larger than Local economic study for the entirety of the County Council areas. The purpose of the study is to ultimately provide a robust basis on which to plan future provision of land and premises for economic activities across Carmarthenshire and Pembrokeshire.

The *Technical Advice Note 23* states that any 'larger than local' study should identify existing strategic sites across constituent LPAs. It furthers, that these sites are typically national, or larger than local, in significance; where the impacts of the site's development will go beyond the local authority boundary within which they are located. The *Practice Guidance – Building an Economic Development: Evidence Base to Support an LDP* considers that not every LPA will have a strategic site. In terms of collating this information, most will also be extracted from the employment site inventory prepared at a local authority level.

## 1.2 Structure of the Appendix

Having estimated the overall forecast land requirement across the area for the Standard Industrial Classification Employment Sectors, it is important to refine the definition of 'Strategic Sites' and to understand the alignment between employment sector land-take and availability of sites.

Following from the existing definition of strategic sites, the following document will therefore:

- Refine the definition of Strategic Sites within the context of the Larger than Local Economic Study;
- Collate a long-list of Strategic Sites and undertake an initial sift; and,
- Categorise the short-list of Strategic Sites against the definitions.

## 2 Larger than Local Strategic Sites: Refining the Definition

### 2.1 Overview

Using the existing definition of Strategic Sites within the NDF and respective adopted Local Plans, it is necessary to review whether this existing definition remains relevant in the context of the study.

### 2.2 Larger than Local Study Starting Point: Strategic Sites

The definition of Strategic Sites is set out within existing literature as follows:

**Table 1** Definition of Strategic Sites

	Adopted Local Development Plan Allocations	Emerging Local Development Plan Definition
National Development Framework		10ha and above
Pembrokeshire	20ha and above	Not defined, but Preferred Strategy identified that these would likely be in the following key locations: Trecwn, Milford Haven and Pembroke Dock (including sites related to the waterway) and Haverfordwest.
Carmarthenshire	9-10ha or above	Not defined, however the Planning Strategy identified these would be based on their contribution to delivering the future growth requirements for Carmarthenshire (see policy SP1 above) and due to their relationship with the Swansea Bay City Deal.
Pembrokeshire Coast	0.93 ha	Criteria-based policies
Brecon Beacons	0.35 – 1.4ha	Not defined.

Based on the review of background literature, ‘Strategic Sites’ are therefore currently defined as those which **are larger than approximately 10ha**.

However, although not over 10ha in size, there are a number of areas and sites which are linked to sector priorities and initiatives. These include spatially-clustered sites within areas identified by:

- The Swansea Bay City Deal (including the Pembroke Dock Marine, Llanelli Life Sciences and Well-being Village, or the Creative Digital Cluster at Carmarthen);
- Target areas for regeneration funding with the South West Wales Regional Plan for Regeneration (2018) (including Ammanford, Llanelli, Haverfordwest, Pembroke), City Deal or Enterprise Zone.

Existing sectoral strengths, priority initiatives and infrastructure assets therefore have a role in determining whether a site is ‘strategic’ at the Larger than Local’ study level, and the principles against which these are assessed against. The above ‘starting point’ definition of strategic sites will therefore be reviewed following a review of the policy context, current strengths and weakness and drivers for change across the Larger than Local study area.

## 2.3 Larger than Local: Reviewing the definition of ‘Strategic Sites’

Previous studies of this nature have focussed on size (e.g. sites greater than 10ha) and or significance (in terms of sectoral growth prospects) in order to define a strategic site. Following a review of the current strengths and weakness, and forecast drivers for change, it becomes apparent that such a definition could be considered to be too rigid and lacking in flexibility to align with varying nature of demand across the Larger than Local area.

Using previous work undertaken by Arup, a review of comparative definitions of Strategic Sites and the existing definition of Strategic Sites within the Larger than Local Area as well as a review of existing strategic employment land studies and similar Larger than Local economic assessments undertaken across Wales (see table 1 above), the following seeks to recognise variation in the definition of those sites that are strategically important depending on context and to reduce over-reliance on any one type of site. The Technical Advice Note 23 helpfully states that strategic sites are typically those with a ‘larger than local significance’ where the impacts of the site’s development go beyond the Local Authority boundaries; therefore, this will act as a key test in the definition of these sites.

**Table 2** Hierarchy of Strategic Employment Sites

Definition	Strategic Site	Ranking of Sites
Larger than Local Regionally Strategic Site	Sites which are of regional importance with a critical role in achieving national economic development objectives or supporting key economic sector growth priorities.	<b>Primary Site</b> – Site of over 10ha which is of a sufficient scale for development and significant investment in growth sectors.
Larger than Local Strategic Site Supporting Cluster	Sites which align with strategic growth sectors or regional and local priorities, however which function as a cluster of sites. These often provide a supporting role to an identified Strategic Site or a key employer.	<b>Secondary Site</b> – Strategic sites that will support more indigenous growth, expansion of existing firms and medium scale investment. These sites collectively amount to more than 5ha and are geographically proximate.
Larger than Local Gateway Site	Sites which operate as a gateway to a larger than local market (such as the ports or large sites adjacent to the A40 / M4 corridor).	<b>Primary Site</b> – Site located adjacent to a key gateway infrastructure asset.
Larger than Local Future Potential Strategic Site	Sites which have the potential to align with key growth sectors, or which have regionally important transport access, however which are currently not	<b>Future Potential Site</b> – A site which might be suitable for attracting significant investment however where additional significant feasibility work is

Definition	Strategic Site	Ranking of Sites
	considered to be available or achievable as employment land.	necessary to test allocating the site as a Strategic Site.

At this stage, it is important to reiterate that it is not the role of the Larger than Local employment study to assess local employment sites. This assessment will continue to be fulfilled by individual Local Planning Authority Employment Land Reviews.

#### a) Larger than Local Regionally Strategic Sites

These are defined as sites which are considered to be of critical importance to achieving regional and national economic development objectives. These sites will align with key growth sectors, can support the development over the Plan Period and are typically over 10ha.

These will be high quality locations for both local and inward investment, presenting a coordinated offer of sectorially-strong sites to direct both Welsh Government and regional investment inquiries. The characteristics of regionally strategic sites are as follows:

- Sites with a clear identity and which align with future priorities within the region;
- Single employer and approximately 10ha or larger;
- Good road and / or port transport accessibility;
- Supportive of forecast sectoral growth demands with a reasonable likelihood that main operators within the area will continue to locate in the region; and,
- Evidence of supporting a locally-significant supply chain.

#### b) Larger than Local Sector-specific / Supporting Strategic Site Clusters

There is emerging evidence of sites within the region operating as sector-specific growth areas or supporting clusters. Anecdotal evidence has indicated a perceived slowness in being able to respond to development inquiries in proximity to existing regionally strategic sites. By exploring Local Development Orders or Planning Performance Agreements, these 'Sector-specific / Supporting Strategic Site Clusters' could offer an opportunity to respond to demand for growth from new or existing companies and reducing over-reliance on major single-site employers. This will be particularly impactful in light of responding to uncertainty associated with Brexit. The characteristics of sector-specific / support strategic site clusters are as follows:

- Sites with a dominant employer / sector and a concentration of supporting supply-chain or general employment companies in close proximity;
- Multiple employers and approximately 5ha or larger;
- Opportunities to intensify existing uses on site or enable expansion of existing indigenous companies;
- Good road and / or port transport accessibility; and,

- Existing demand on site evidenced through market churn of existing small units.

### c) Larger than Local Gateway Site

Location is one of the greatest challenges and opportunities within the Larger than Local area. Growth and demand for employment land within the area has historically focussed on natural locational assets or key infrastructure advantages (such as the Port of Milford Haven or Fishguard / Goodwick).

Sites may be classifiable as a ‘Gateway Site’ and another definition also, recognising that sites may be of primary importance and a gateway to a Larger than Local market. Key characteristics of a Strategic Gateway Site therefore include:

- Proximity to the A40 or M4 corridor, particularly within approximately 5km of junctions with both east and west slips onto the strategic road network; and / or;
- Proximity to the Port, with access to the strategic road network and water’s edge or jetty.

### 4) Larger than Local Future Potential Strategic Site

As a result of the uncertainty of Brexit and the opportunities that this may bring in terms of serving greater domestic markets, it became apparent from stakeholder engagement that a series of larger sites within the area may be suitable for employment uses, subject to further investigation.

Likewise, despite current forecasts, there is a broad rationale to continue to preserve ‘strategic opportunities’ associated with locational advantages and current sectoral strengths. These sites are unlikely to be deliverable in the early stages of the plan, with additional assessment and feasibility testing to determine future developability of these sites.

Key characteristics of Future Potential Strategic Sites are as follows:

- Standalone, large vacant sites (5ha and over) which represents an opportunity to fulfil a current market gap; and,
- Sites with unique infrastructure provision associated with historic use, which may present a regional opportunity subject to further feasibility testing (i.e. railhead sites adjacent to the port with tri-modal access, or unique on-site infrastructure);
- Existing large-scale land uses which may become less operationally viable over time, adjacent to existing ‘Regionally Strategic Sites’, ‘Sector-specific Strategic Sites’ or ‘Supporting Strategic Site Clusters’.

Future Potential Strategic Sites should not be considered for further inclusion within an LDP until additional feasibility work has been undertaken.

## **Local Employment Sites**

Whilst it is recognised that the definition of what constitutes a ‘Strategic Site’ will vary significantly depending on context, the assessment of local employment sites will continue to form part of a local-level employment land review.



## 3 Larger than Local Strategic Sites: Strategic Site Inventory

---

### 3.1 Overview

The starting point for the assessment is to develop the ‘Long-List’ of employment sites across the Larger than Local area. Using an initial sift of ‘absolute thresholds’, this long-list is therefore refined to a series of sites which will then be testing against the short-list ‘Assessment Criteria’.

### 3.2 Collating a Strategic Site Inventory: Creating a Long-List

As prescribed within the *Practice Guidance – Building and Economic Development: Evidence Base to Support a Local Development Plan*, the assessment of strategic sites begins with the collation of a portfolio of sites to be appraised. These have been aggregated based on the following Practice Guidance criteria and the broad definitions of strategic sites set out above, to include the following categories:

**Existing employment stock (developed):** This includes existing employment floorspace, whether occupied or vacant. Strategically important operational sites will be critical in achieving economic development objectives and supporting indigenous firms. The long-list has therefore included a review of:

- Large-scale or strategically located sites amounting to 5ha, and which are spatially-clustered around a sector or key employer;
- Vacant parts of existing Strategic Sites.

**Committed Sites:** These comprise the land supply currently identified by the planning system to accommodate change in B-class uses. It is necessary to review these as a means to understanding whether this planned supply or portfolio aligns with future demand requirements. The long-list has therefore included a review of:

- Sites currently defined as strategic sites within respective adopted Local Plans;
- Sites with large-scale planning permission for employment uses.

**Potential Sites:** These potential sites are less clear but can include development proposals which are being promoted or marketed, sites mentioned through discussions with public bodies or otherwise. The long-list has therefore included a review of:

- Sites currently defined as strategic sites within respective emerging Local Plans; and,
- Development proposals submitted through the LDP process, which are directly adjacent to existing employment sites and which align with the settlement hierarchy.

At this stage, it is important to reiterate that the Economic Study strategic site appraisal focuses on traditional employment uses (B1, B2 and B8), whilst the interventions detailed in the main report are more generally applicable across both other economic land uses and traditional B1, B2 and B8 uses.

### 3.3 Collating a Strategic Site Inventory: Refining the Long List

Once the above sites have been collated, the second stage comprises an assessment of these sites against principles underpinning the ‘strategic sites’ definitions. This included an initial sift of ‘absolute’ thresholds:

- Strategic sites over 10ha, typically consisting of a single employer;
- Standalone sites over 5ha;
- Clusters of sites which are cumulatively larger than 5ha, and broadly adjacent to each other; and,
- Sites which are cumulatively larger than 5ha which could also be considered to represent a gateway site, through connections to strategic infrastructure such as the Port and A-roads / M4.

This has reduced the number of sites to **31**; within the ‘long-list’ of strategic sites, clustered strategic sites or gateway sites. These include the following:

**Table 3** ‘Long-list’ Strategic Employment Portfolio

Site Name	Components	Gross Area (ha)
Fishguard Harbour Cluster	Goodwick Harbour Fishguard Harbour Goodwick Industrial Estate Goodwick Parrog	50.9
Celtic Link Business Park	Singular site	13.5
Trecwn	Singular site	21.2
Withybush	Withybush North of Business Park Withybush Business Park Withybush Industrial Estate Withybush East of Business Park	42.1
Milford Haven Oil Refinery (Puma Energy)	Singular site	148.2
South Hook LNG	Singular Site	201.0
Honeyborough Industrial Estate	Existing Honeyborough Industrial Estate North of Honeyborough Industrial Estate	8.0
Thornton Industrial Estate	Thornton Industrial Estate Land adjacent to Marble Hall Road Land at Hayguard Hay South of Thornton Cemetery	41.2
Blackbridge	Singular site	33.5
Waterstone Energy (Dragon LNG)	Singular Site	17.7
Pembroke Oil Refinery (Valero Energy)	Singular Site	218.5

Site Name	Components	Gross Area (ha)
Pembroke Power Station	Singular Site	195.8
Pembroke Dock Cluster	Royal Dockyard West Llanion Business Park Land West of the Market, Meyrick Owen Way Martello Quay	45.9
Pembrokeshire Science and Technology Park	Science and Technology Park Land at Cleddau Bridge Business Park Land at Warrior Way Cleddau Bridge Business Park	16.9
Waterloo Road and London Road Industrial Estate	Waterloo & London Bridge Industrial Estate Kingswood Industrial Estate	32.0
Former Carew Airfield	Former Carew Airfield Carew Airfield Business Park	17.7
Brickhurst Park Industrial Estate	Existing Brickhurst Park Industrial Estate Johnston – Arnolds Yard Station Industrial Estate, Johnston	8.7
Merlins Bridge Creamery	Merlins Bridge Creamery Merlins Bridge Creamery Extension Land at Freemans Way	15.3
Cillefwr	Cillefwr Industrial Estate Cillefwr Employment Area	25.5
Draka / Copperworks	Singular site	9.0
Bynea, Llanelli	Singular site	29.7
Trostre, Llanelli	Singular site	70.4
Trosserch Road	Trosserch Road Industrial Estate Riverside Industrial Estate	28.5
Dafen, Llanelli	Singular site	61.0
Cross Hands	Cross Hands East Cross Hands West Food Park Parc Menter Cross Hands Business Park	98.5
Cilyrychen	Cilyrychen Industrial Estate Panthodyn Industrial Estate	14.9
Church Bank Industrial Estate	Church Bank Industrial Estate Sawmills	10.2
Capel Hendre	Singular Site	25.0
Parc Hendre	Singular Site	25.0
Betws Colliery	Singular Site	13.4
Llanelli Wellness and Life Science Village	Singular Site	18.6

This ‘long-list’ of sites has then been broadly assessed against specific site appraisal criteria to determine whether or not they should be considered within the shortlist for the ‘Larger than Local’ strategic employment sites. The criteria used to assess strategic sites as well as a description of each criterion is shown in table 4 below.

**Table 4:** Assessment Criteria

Criteria	Description
Site Area	<ul style="list-style-type: none"> <li>Site area in hectares.</li> </ul>
Site Potential	<ul style="list-style-type: none"> <li>Amount of vacant land available for expansion/redevelopment;</li> <li>Whether the site was allocated in LDP1 or a proposed allocation in LDP2; and,</li> <li>Whether there is known market interest for employment uses in the area.</li> </ul> <p><b>Key question:</b> Does the site have potential to support growth?</p>
Key Sector Potential	<ul style="list-style-type: none"> <li>Whether the site has an existing clear identity or dominant sectoral function;</li> <li>Existing strategic employers located at the site;</li> <li>Evidence of supply chain businesses operating at the site.</li> </ul> <p><b>Key question:</b> Evidence of ability to support growth sectors/evidence of anecdotal demand?</p>
Alignment with Settlement Hierarchy	<ul style="list-style-type: none"> <li>Closest settlement;</li> <li>Sites adjacency to settlement (i.e. is it within settlement boundary).</li> </ul> <p><b>Key question:</b> Does the site align with the existing settlement hierarchy?</p>
Location, Accessibility and Deliverability	<ul style="list-style-type: none"> <li>Proximity to strategic road network, harbour, port or other strong links to the wider region;</li> <li>Proximity to public transport;</li> <li>Site constraints; and,</li> <li>Unique site characteristics.</li> </ul> <p><b>Key Question:</b> Does the site display unique strategic infrastructure constraints or locational advantages?</p>

Initial assessment of the sites based on the above criteria reveals some sites which are currently operational and have no vacant land available for reconfiguration/expansion.

In some cases, these sites have an established use which is considered to be strategic in nature and/or are operated by strategic employers of a regional, or in many cases national significance e.g. Valero Energy<sup>1</sup>. It was felt at this stage of the assessment these sites could be immediately shortlisted as **regionally important strategic sites** although a distinction is made that these sites are **operational** and therefore no interventions are required to expand their employment function. On this basis, they have not been sifted through the next stage of assessment detailed in section 2.6 below.

The immediately shortlisted sites are the following:

- Milford Haven Oil Refinery (Puma Energy)
- South Hook LNG
- Waterstone Energy (Dragon LNG)
- Pembroke Oil Refinery (Valero Energy)
- Pembroke Power Station
- Trostre, Llanelli.

<sup>1</sup> <https://www.valero.com/en-us>

The remaining **25** sites require more research in order to define their function. As such they were put through further detailed assessment as detailed in section 3.4.

### 3.4 Collating a Strategic Site Inventory: Creating the short list

The criteria shown in table 4 above form the four stages of assessment used to determine which of the 25 remaining long list sites within the long list should be taken forward into a final list of Larger than Local Strategic Employment Sites: Site Potential, Key Sector Potential, Alignment with Settlement Hierarchy and Location, Accessibility and Deliverability.

A RAG matrix was set up in order to be able to sift the long list of sites and determine their categorisation as shown in the table below.

**Table 5:** Creating the Strategic Site Shortlist – Assessment Criteria

Stage of Assessment & Criteria	RAG Status		
	Strongly fulfils criteria	Moderately Fulfils Criteria	Weakly fulfils criteria
<b>Stage 1 Site Potential</b>	<p>Site is currently allocated as a Strategic Site within the adopted Local Plan, with sufficient space for re-development or expansion potential.</p> <p><i>Or</i></p> <p>Site is identified for an allocation as a Strategic Site for employment within the emerging LDP2 (i.e. Trecwn).</p> <p><i>AND</i></p> <p>Adjacent promoted sites demonstrating market demand or vacant space for development.</p>	<p>Site is currently allocated as a large employment site or cluster of employment sites within the adopted Local Plan, with limited space for re-development or expansion potential</p> <p><i>Or</i></p> <p>Site is allocated but not as a Strategic Site within the adopted Local Plan, but forms part of a cluster of similar sectoral uses.</p>	<p>Site is not adopted within LDP1 or proposed within LDP2</p> <p><i>Or</i></p> <p>There is no availability of land on site, and there is evidence of recent investment which would limit current site potential.</p> <p><i>Or</i></p> <p>Businesses are not linked in anyway other than by location. There are no opportunities to consolidate existing uses.</p>
Sites which weakly fulfil criteria are omitted from the Study at Stage 1.			
<b>Stage 2 Key Sector Potential</b>	<p>Site has a clear identity due to an agglomeration of existing business all operating within one particular sector (e.g. manufacturing business).</p> <p><i>Or</i></p> <p>Site is wholly occupied by one existing regionally strategic employer.</p> <p><i>Or</i></p>	<p>Existing uses at the site suggest that there are a number of uses operating to support a strategic growth sector (supply chain)</p> <p><i>Or</i></p> <p>The site is vacant and further assessment is needed to determine</p>	<p>Site is primarily occupied by local uses with no clear pattern or identity to existing businesses operating at the site.</p>

Stage of Assessment & Criteria	RAG Status		
	Strongly fulfils criteria	Moderately Fulfils Criteria	Weakly fulfils criteria
	The site is largely vacant with unique characteristics (e.g. proximity to a port) which would create opportunities for a specific growth sector.	whether it could support a strategic growth sector.	
Sites which weakly fulfil criteria at Stage 2 and moderately fulfil criteria at Stage 1 are omitted from the Study at this stage.			
<b>Stage 3 - Alignment with Settlement Hierarchy</b>	Site is located within or directly adjacent to larger settlements within the hierarchy	Site is on the edge of a larger settlement / growth zone in the settlement hierarchy	Site is within the open countryside or not in close proximity any larger settlement / growth zone.
<b>Stage 4 - Location, Accessibility and Deliverability</b>	Site is adjacent to an east-west A-road or M4 corridor (with east-west facing slips), or site is within close proximity to the Port (with preferable Port side access) <i>Or</i> Site has particularly unique site characteristics (e.g. access to deep water at Port) which makes it regionally important to preserve for future market demand.	Site is within 5km of the east-west A-road network or is directly adjacent to the north-south A-road network. Site is within relatively close proximity to the port. <i>Or</i> Site has good public transport links, by virtue of its proximity to a larger settlement / growth zone. <i>Or</i> Site has known constraints which would require further investigation to determine viability.	Site is not located near to strategic transport network or other. <i>Or</i> Site has considerable known constraints which may pose a significant barrier to deliverability.
Sites which strongly fulfilled criteria in Stage 3 and 4 are taken forward into the final strategic site shortlist along with the operational sites which have been immediately shortlisted.			

After completion of the above assessment the following are determined to be the final ‘Larger than Local’ Strategic Employment Sites shortlist.

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

## 4 Larger than Local Strategic Sites: Categorising Sites against the Definitions

### 4.1 Overview

The Practice Guidance identified that the ‘Larger than local Study’ could look to describe the purpose and use of existing and proposed strategic sites. The following categorises the Long-list of sites against the Strategic Site definitions.

### 4.2 Categorising sites against the definitions

At the same time as the assessment detailed in section 3.4 is being carried out, attention is paid to the type of strategic site categorisation the shortlisted sites should be considered as, in line with definitions of strategic sites presented in section 2.3 above. Whilst some sites e.g. Trecwn can more easily be determined to be a single type of site (in this case a Future Potential Strategic site) some sites fall in to more than one category. Where this is the case, two definitions have been provided in the below table.

Sites are also identified specifically where they are operational, this is because operational sites will also demand a different policy approach (e.g. to support existing uses) compared with opportunity sites which have further potential for expansion to support key sectors.

**Table 6:** Defining the Strategic Sites

Site Name	Strategic Site Definition	Rationale for Definition
Fishguard and Goodwick Harbour Cluster	Gateway Site  Sector-specific supporting strategic site cluster	Site has been determined to be a gateway site due to its port location and strategic connections to Ireland.  The site cluster has clear potential associated with harbour uses with good accessibility to the Port of Fishguard.
Trecwn	Future Potential Strategic Site	Site is considered to be important to safeguard for employment, but due to its unique characteristics the end sectoral user is unclear. For this reason, the deliverability of the site will require additional evidence.
Withybush Cluster	Regionally Important Strategic Site (opportunity)  Sector Specific/Supporting	The site is partially operational and currently supports ‘larger than local’ employers. It is over 10ha in area and has good accessibility by road. For these reasons it is considered to be a regionally important strategic site.  The site is developing an identity around food production and distribution (supported by anchor businesses such as Puffin Produce <sup>2</sup> ). There are clear

<sup>2</sup> <https://www.puffinproduce.com/>

Site Name	Strategic Site Definition	Rationale for Definition
	Strategic Site Cluster (opportunity)	opportunities for expansion within this growth sector identified e.g. Withybush Food Park Masterplan <sup>3</sup> .
Milford Haven Oil Refinery (Puma Energy)	Regionally Important Strategic Site (operational)	The site is over 10ha in area, is located in very close proximity the Port of Milford Haven and supports a single employer which is considered to be of regional significance to the energy sector.
Blackbridge	Regionally Important Strategic Site (opportunity)	Site is one of the only remaining sites with direct access to the deep water in the Milford Haven area. It is over 10ha.
Waterstone (Dragon LNG)	Regionally Important Strategic Site (operational)	The site is over 10ha in area, is located in very close proximity the Port of Milford Haven and supports a single employer which is considered to be of regional significance to the energy sector
South Hook LNG	Regionally Important Strategic Site (operational)	The site is over 10ha in area, has direct access to the deep-water Port of Milford Haven and supports a single employer which is considered to be of regional significance to the energy sector.
Pembroke Oil Refinery (Valero)	Regionally Important Strategic Site (operational)	The site is over 10ha in area, has direct access to the deep-water Port of Milford Haven and supports a single employer which is considered to be of regional (and national) significance to the energy sector.
Thornton Industrial Estate Cluster	Sector-specific/Support strategic site cluster (opportunity)	The site is over 10ha and is located within proximity of the Port of Milford Haven. There is opportunity to intensify existing uses on the site, many of which have been determined to specifically support supply chain uses associated with the port.
Pembroke Dock Cluster	Gateway Site  Sector specific/supporting strategic site cluster (operational)	The site is one of the only remaining sites within proximity to the Port of Milford Haven with direct access to the deep water. Additionally, it is the site of the ferry to Rosslare.  The site is situated in very close proximity to Pembroke Dock and existing uses generally comprise supply chain uses supporting dock functions. The site has clear potential for further expansion of port related development/employment uses that require access to the port. Additionally, it is a key site of the Pembroke Dock Marine project part of the Swansea Bay City Deal.
Pembroke Science and Technology Park Cluster	Regionally Important Strategic Site (opportunity)	Site is over 10ha with good access to road and the Port of Milford Haven. There is a large amount of vacant land available and evidence of clustering of employers within the marine energy sector.
Waterloo and London Road	Sector specific/supporting	Site is over 10ha and there is clear evidence of supply chain uses with direct links to the existing

<sup>3</sup> Pembrokeshire County Council (2019) <https://www.pembrokeshire.gov.uk/newsroom/plans-on-show-in-library>



Site Name	Strategic Site Definition	Rationale for Definition
Industrial Estate	strategic site cluster (operational)	port. There is opportunity for expansion at the site for further clustering of port-related development.
Bynea, Llanelli	Regionally Important Strategic Site (opportunity)	Site is over 10ha with easy access to the A484 providing a direct link to Swansea. Evidence that the site currently has a sector focus on manufacturing, however this is primarily from supply chain companies due to the closure of Schaeffler considered to be regionally strategic employer.
Trostre, Llanelli	Trostre, Llanelli (operational)	Site is over 10ha and has good access to the strategic road network. It is occupied by a strategic regional employer as well as supporting supply chain uses.
Dafen, Llanelli	Regionally Important Strategic Site (opportunity)	Site is occupied by regionally strategic employers with a focus on the manufacturing sector and supporting uses. It is located in close proximity to the strategic road network and is a large 61ha site.
Cross Hands	Regionally Important Strategic Site (opportunity)	Site has east/west slips to the A48/M4 making it highly accessible. It is a large site comprising a number of vacant plots with redevelopment / expansion potential
	Sector specific/supporting strategic site cluster (opportunity)	Site is developing a nationally recognised identity around the food manufacturing and distribution sector anchored by regionally important employers e.g. Castell Howell <sup>4</sup> .
Parc Hendre	Regionally Important Strategic Site (opportunity)	Site is situated in close proximity to Cross Hands and has good access to the A48/M4 strategic road network via the A483. The site is occupied by a number of manufacturing companies in large units which are considered to perform a 'larger than local' function and has sufficient vacant land for expansion.
	Sector specific/supporting strategic site cluster (opportunity)	Site could develop identity further to have a sector-specific focus on the manufacturing sector. The proximity to Cross Hands also means potential links / supporting functions could be explored.
Llanelli Wellness and Life Science Village	Regionally Important Strategic Site (opportunity)	Site is an important site as part of the Swansea Bay City Deal, this strategic site forms an important investment in the life sciences sector, a key Welsh Government Priority.
	Sector specific/supporting strategic site cluster (opportunity)	Potential to attract uses to support wider wellness/life sciences function.

<sup>4</sup> <http://www.castellhowellfoods.co.uk/>

### 4.3 Sites for Further Consideration

Following the conclusion of the site assessment process, a number of sites were proposed across the 'Larger than Local area' however, for which there were currently no site boundaries defined. These sites will therefore require additional assessment prior to being defined as a Strategic Site or a Future Potential Site, with some being likely to drop away as a result of size, poor sustainability or lack of identity.

- Cross Hands Employment Zone;
- Former Morlais Colliery, Llangennech;
- Burry Port Harbourside 'Live - Work' Site;
- Pembrey Peninsula;
- Former Ennis Caravans, Cross Hands; and
- Nant y Caws Waste Management Site.

## 5 Next Steps

---

### 5.1 Overview

Section 2 of the report details definitions for Larger than Local Strategic Sites, whilst Section 4 and the Sites Inventory (**Appendix C1**) establishes the Larger than Local approach to strategic sites within the area. Next steps will be for the constituent councils to review the implications of these definitions on LDPs and proposed employment policies.

### 5.2 Policy considerations

The Practice Guidance sets out that plan-makers should review employment land policies to understand how successful these have been, to pin-point challenges and to understand the extent to which sites should be safeguarded from other uses going forward.

The Practice Guidance suggested that policy recommendations should therefore cover five items:

#### **Quantity of land**

A possible approach to supporting employment growth with the area and the overarching strategy is detailed within the Main Report and Appendix B *Baseline Review*. As this is a larger than local study, the approach to economic strategy and this information will require interpretation by each constituent authority.

#### **Criteria-driven policies, and, positive interventions to encourage growth**

Advisory criteria to support positive sector-growth and interventions for non-traditional employment uses are detailed within the main report.

#### **Site-based policy recommendations**

Using the four definitions for strategic sites, the following approaches should be considered as part of policy-drafting. Site-specific interventions are detailed on associated proformas in Appendix C.1 Site Proformas.

The overarching objective of these broad policy considerations is to strike a balance between a **sufficiently flexible context**, which supports new strategic employment land coming forward should it be considered essential to support a programme or a potential investor with specific site requirements, and the **positive prescription of key sectors for specific sites**.

**Table 7** Site-based policy considerations

Definition	Strategic Site	Broad Policy Consideration
Larger than Local Regionally Strategic Site	Sites which are of regional importance with a critical role in achieving national economic development objectives or supporting key economic sector growth priorities.	<ul style="list-style-type: none"> <li>Protect Regionally Strategic Sites against loss to other uses.</li> <li>Provide supportive policy-context for indigenous and existing firms to expand and grow.</li> </ul>
Larger than Local Strategic Site Supporting Cluster	Sites which align with strategic growth sectors or regional and local priorities, however which function as a cluster of sites. These often provide a supporting role to an identified Strategic Site or a key employer.	<ul style="list-style-type: none"> <li>Protect Strategic Site Supporting Clusters against loss to other uses and consider defining preferred sectors to increase and enhance identity of these locations.</li> <li>Provide supportive policy-context for indigenous and existing firms to expand and grow.</li> </ul>
Larger than Local Gateway Site	Sites which operate as a gateway to a larger than local market (such as the ports or large sites adjacent to the A40 / M4 corridor).	<ul style="list-style-type: none"> <li>Provide support for development which enhances the role of, and maximise use of, the gateway location.</li> </ul>
Larger than Local Future Potential Strategic Site	Sites which have the potential to align with key growth sectors, or which have regionally important transport access, however which are currently not considered to be available or achievable as employment land.	<ul style="list-style-type: none"> <li>Protect Future Potential Strategic Sites for the plan period.</li> <li>Consider applying a long-term review timescale for sites designation as 'Future Potential Strategic Sites' to consider whether another use may be more appropriate.</li> </ul>

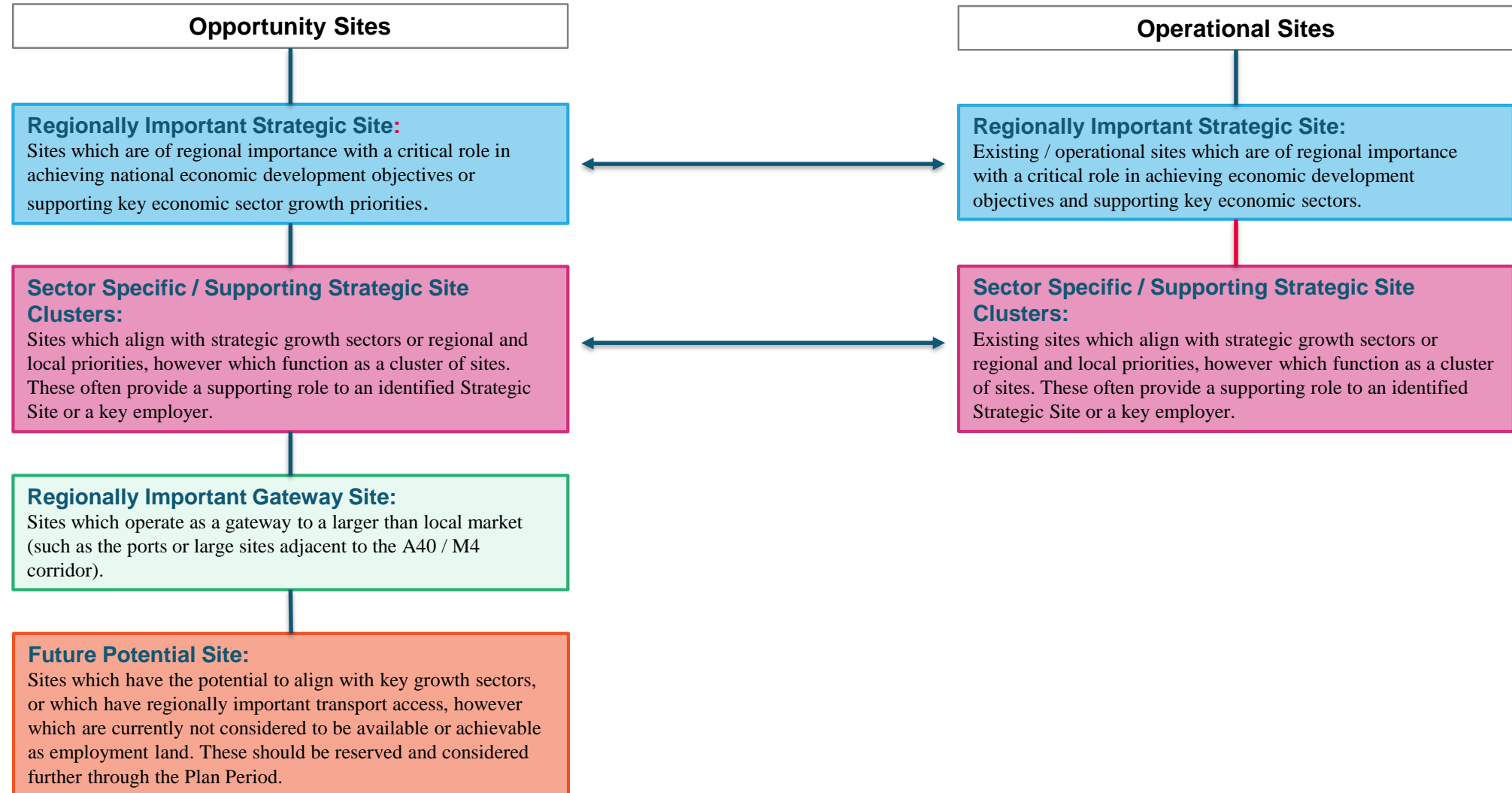
## Monitoring

The constituent Local Planning authorities within the Larger than Local area should, through the Economic Development Officers, continue to develop and maintain a system of tracking investment inquiries on a single shared database.

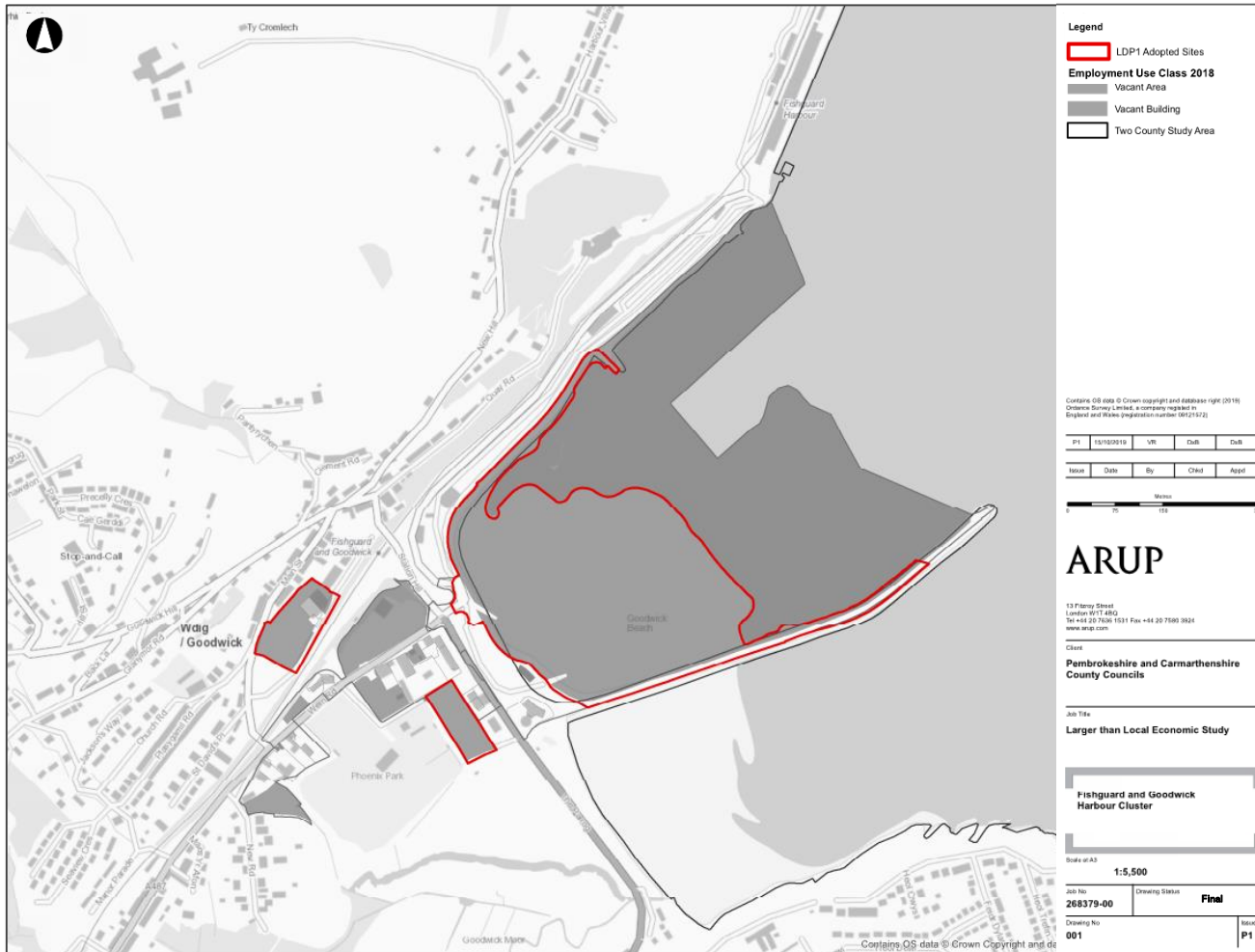
Tracking should as a minimum include the following information:

- Sector;
- Inquiry size (site area or floorspace);
- Dominant use class;
- Specification;
- Reason for inquiry; and,
- If investment doesn't emerge, reason for not locating in the Larger than Local area.

# Appendix C.1



# Gateway Sites



**Name:** Fishguard and Goodwick Harbour Cluster

**Location:** 194731 238213

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

**Sector Focus/Unique Characteristics:**

Ferry Port with direct access to Rosslare, Ireland. Potential for further supply chain uses linked to Port operations.

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

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

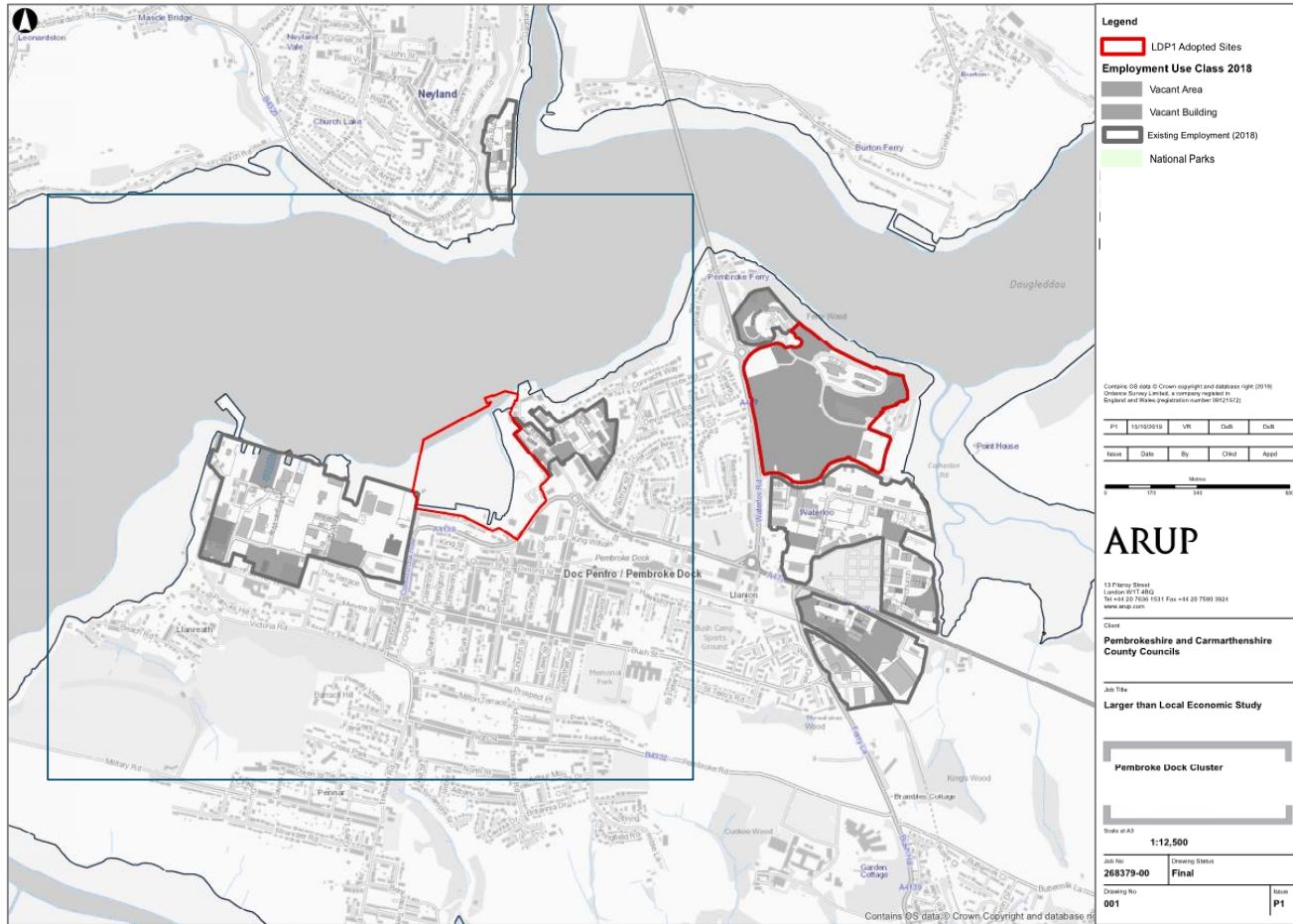
**Site Interventions:** Explore further the opportunity presented by cruise ships and consider supporting infrastructure and port-side site investment where needed.

**Site Area:**  
50.9ha

**Gateway Site**

**Sector-specific / Supporting Strategic Site Clusters**





**Name:** Pembroke Dock Cluster  
**Location:** 195881 203748

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

**Sector Focus/Unique Characteristics:**

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

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

**Site Area:**  
**>35.0ha**

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

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

**Gateway Site**

**Sector-specific / Supporting Strategic Site Clusters**

# Operational Sites



**Name:** Pembroke Oil Refinery (Valero)

**Location:** 195881 203748

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

**Sector Focus/Unique Characteristics:**

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

Strategic location and direct access to deep water.

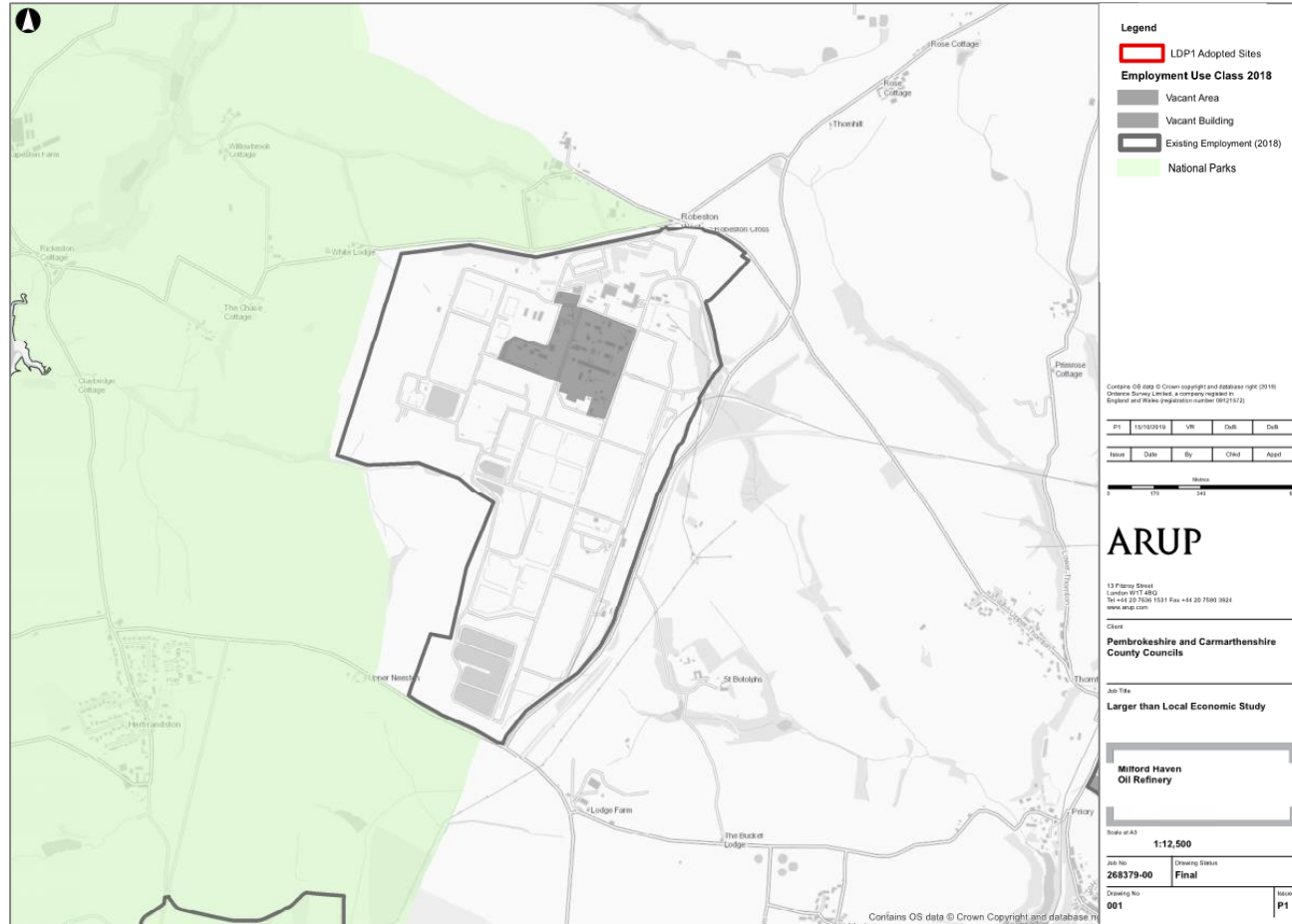
**Site Area:**

**218.5ha**

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

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

**Regionally Important Strategic Site**



**Name:** Milford Haven Oil Refinery (Puma Energy)

**Location:** 188537 208596

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

Site is within the Haven Waterway Enterprise Zone.

**Sector Focus/Unique Characteristics:**

Proximity to deep water with existing bulk liquid pipeline connection.

Existing rail head connection onto the site.

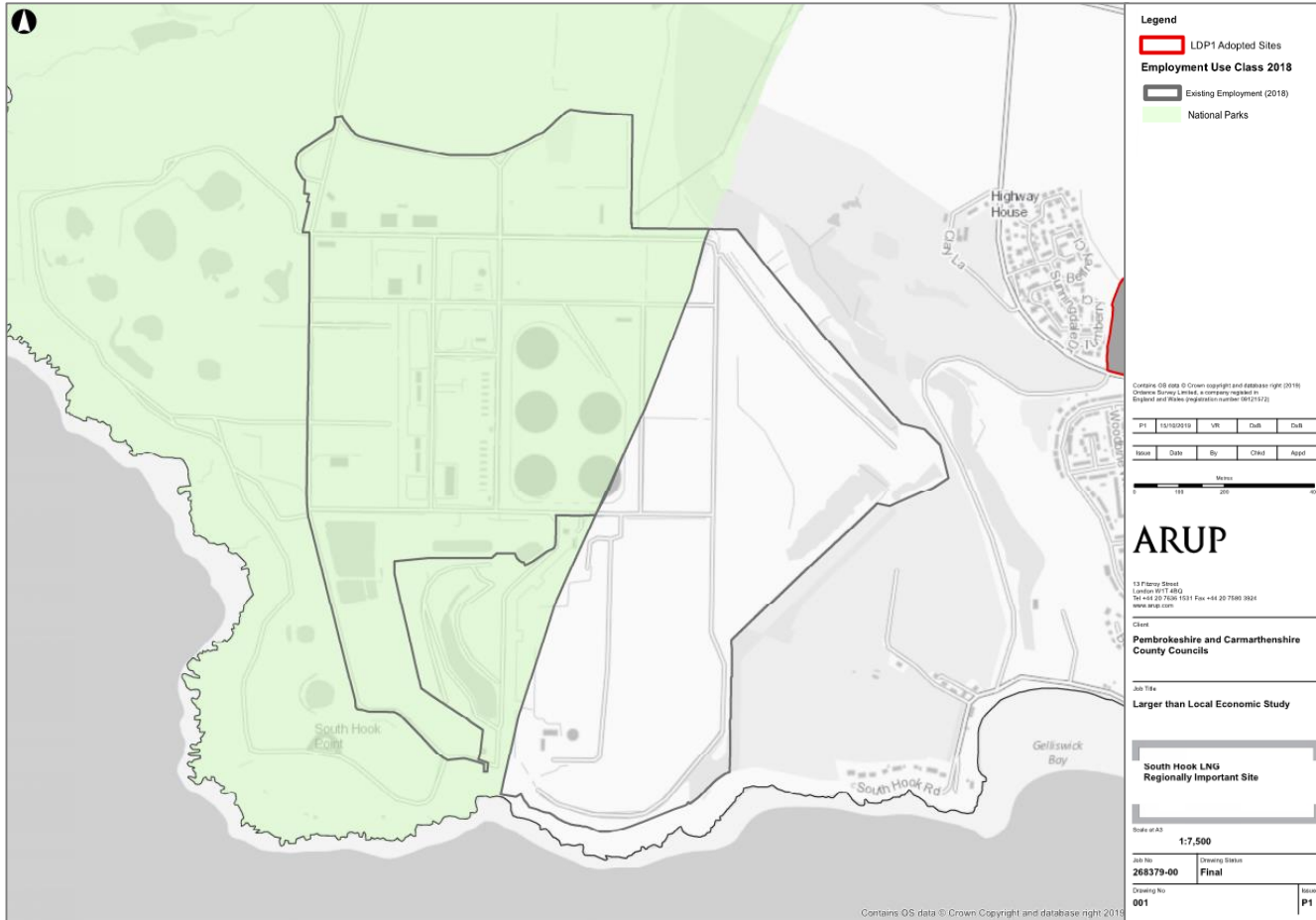
**Site Area:**

148.2ha

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

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

**Regionally Important Strategic Site**



**Name:** South Hook LNG  
**Location:** 193662 205660

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

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

**Site Area:**  
 201.0ha

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

Regionally Important Strategic Site





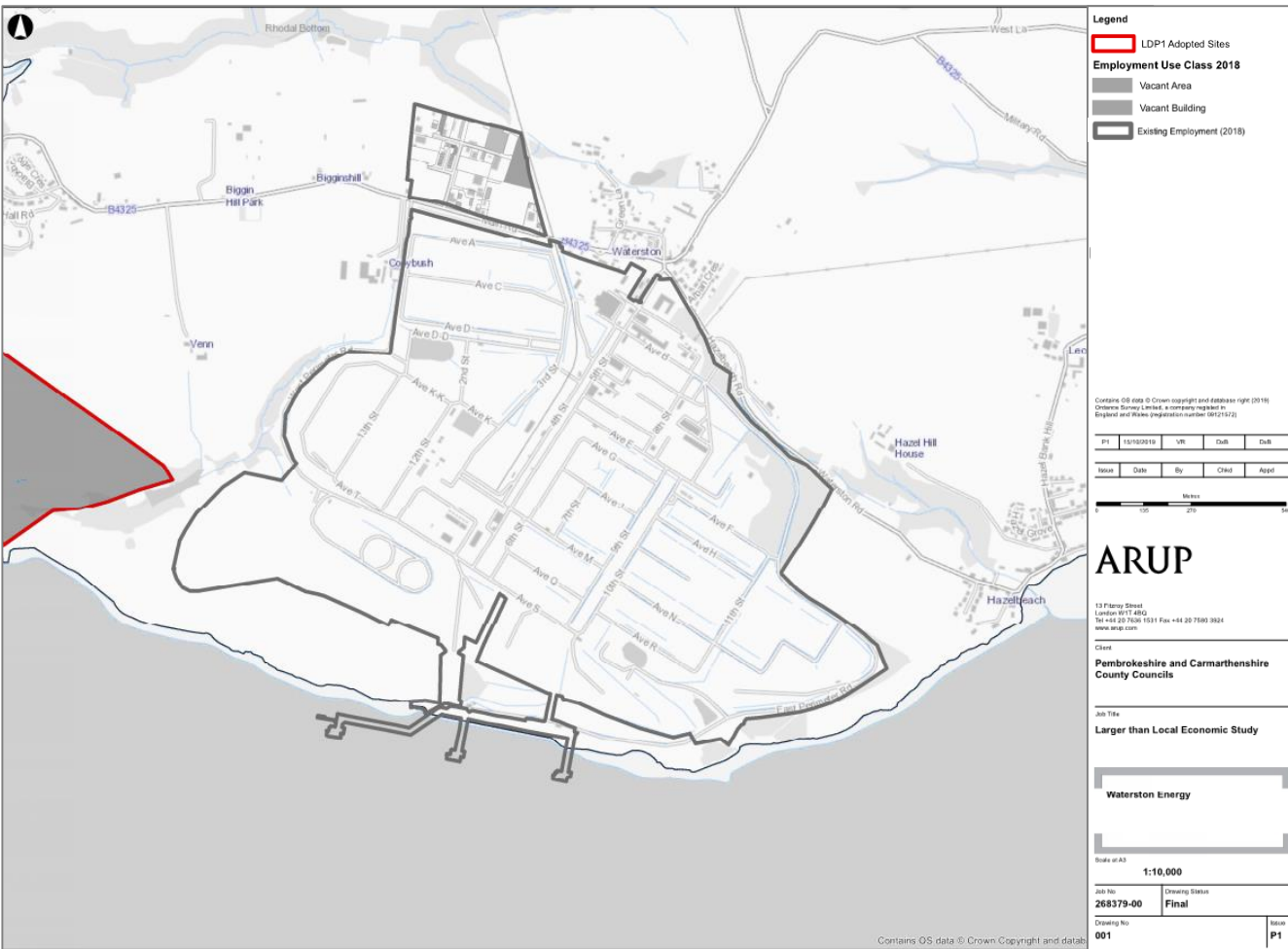
**Name:** Pembroke Power Station  
**Location:** 193396 193396  
**Description:** Site is owned and occupied by a single strategic employer (RWE).

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

**Site Area:**  
 195.8ha

**Most Relevant Broad Interventions:** INV2, INV4  
**Site Interventions:** Support existing employer through continued engagement and understanding of needs.

**Regionally Important Strategic Site**



**Name: Waterston Energy (Dragon LNG terminal)**

**Location: 193675 205597**

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

**Sector Focus/Unique Characteristics:**

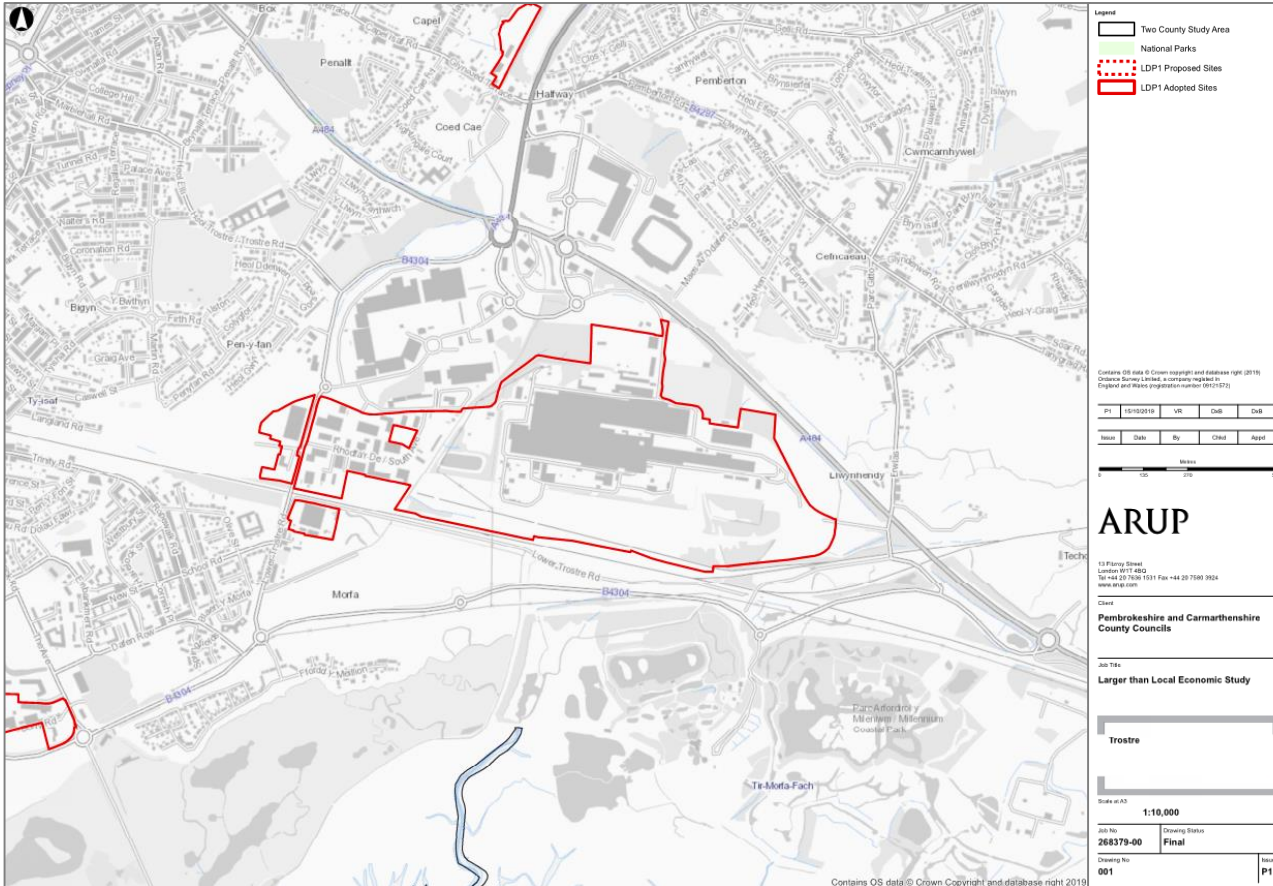
Site is considered to be a strategic employment site linked to the energy sector.

**Site Area:**  
**17.7ha**

**Most Relevant Broad Interventions: INV2**

**Site Interventions:** Locational constraints, including adjacency to the ecologically sensitive Haven Waterway.

**Regionally Important Strategic Site**



**Name:** Trostre Llanelli  
**Location:** 252735 199391

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

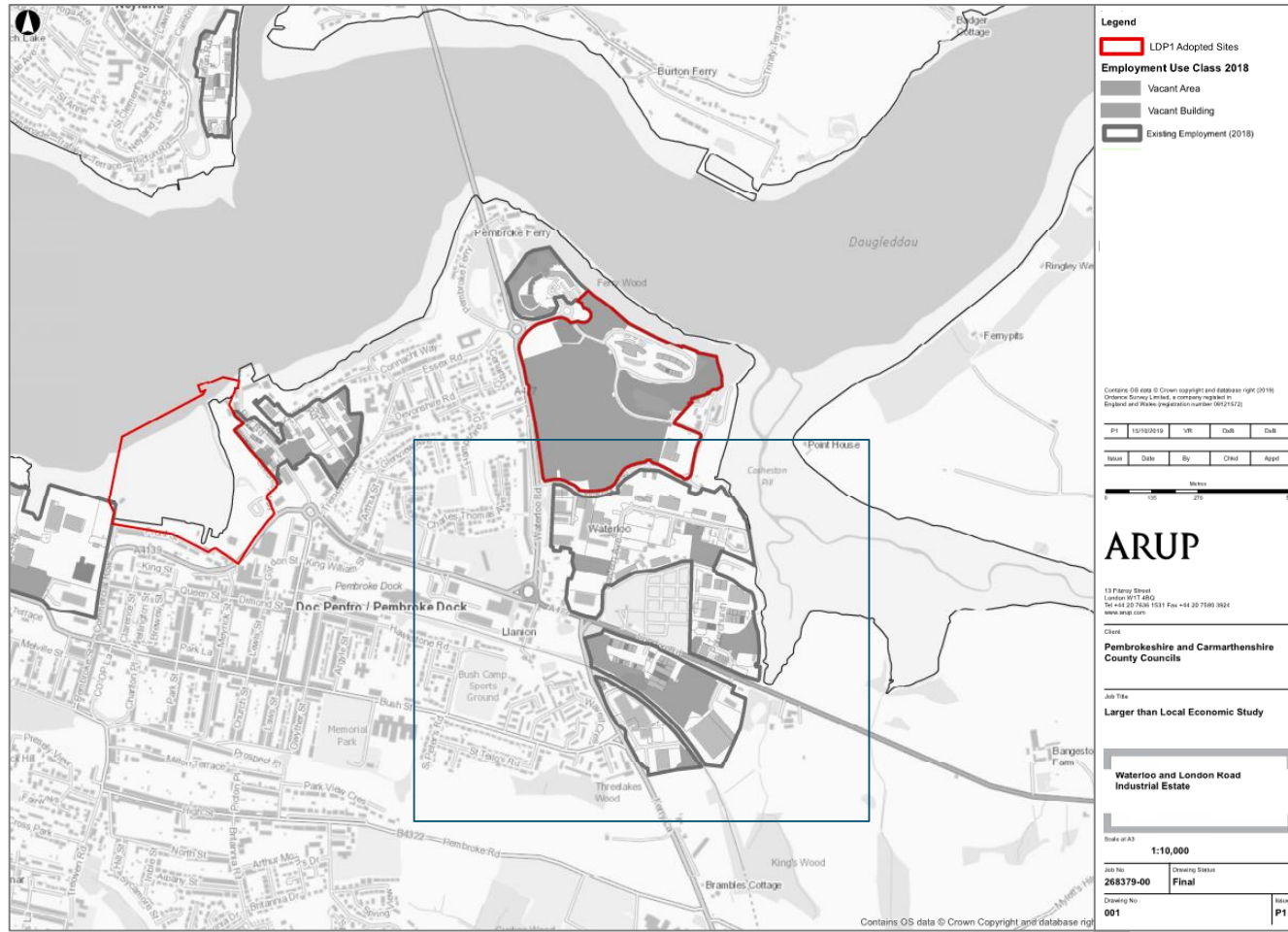
**Sector Focus/Unique Characteristics:**  
 Site has good access to the A484 and in reasonable proximity to Llanelli railway station (approximately 2.2 miles).

**Site Area:**  
 70.4ha

**Most Relevant Broad Interventions:** INV2, INV4  
**Site Interventions:** Support existing employer through continued engagement and understanding of needs.

Regionally-important Strategic Site





**Name:** Waterloo and London Road Industrial Estate

**Location:** 197987 203716

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

**Sector Focus/Unique Characteristics:**

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

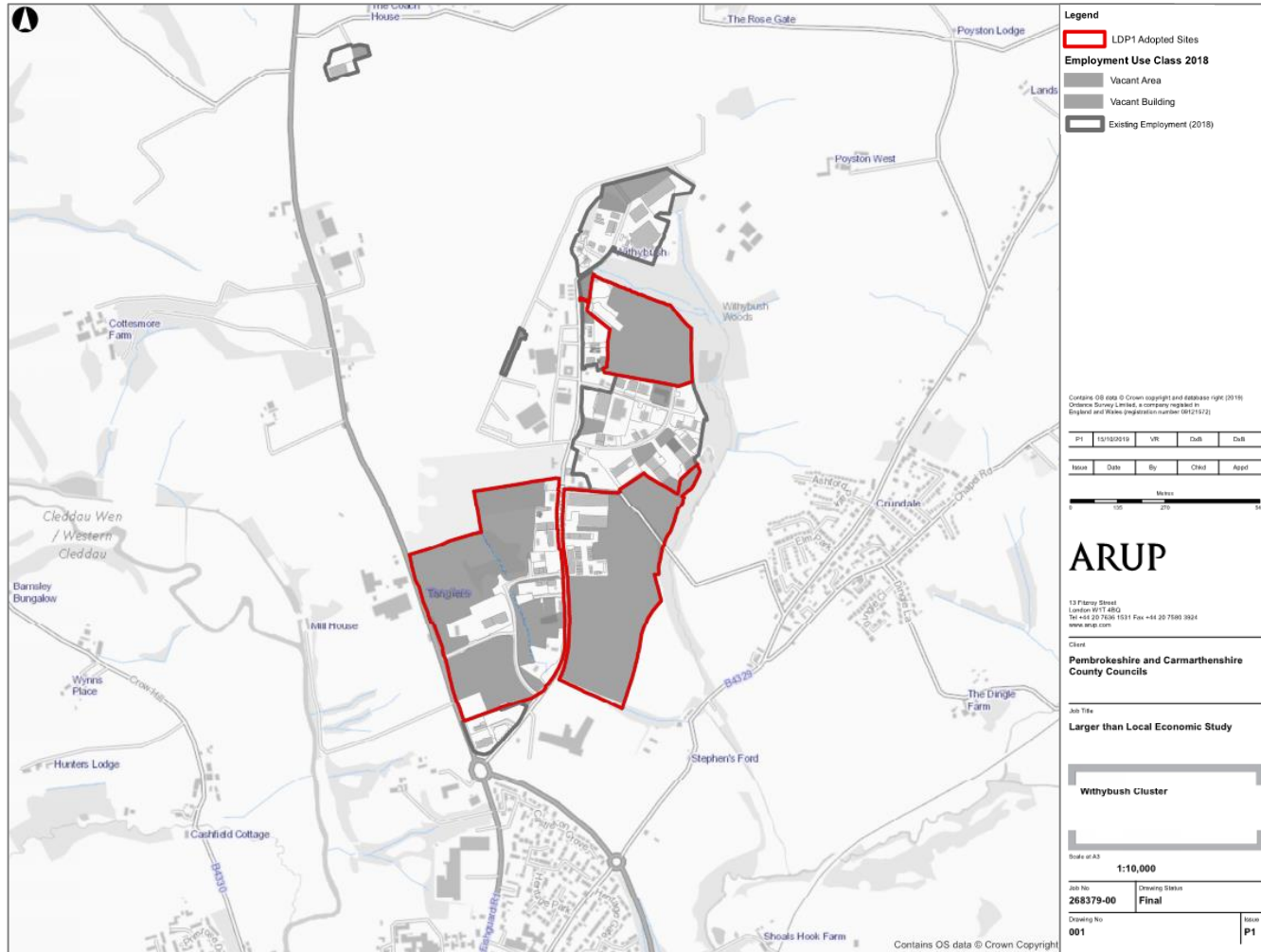
**Site Area:**  
32.0ha

**Most Relevant Broad Interventions:** INV2, INV4

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

**Sector-specific / Supporting Strategic Site Clusters**

# Opportunity Sites



**Name:** Withybus Cluster  
**Location:** 197329 232541

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

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

**Sector Focus/Unique Characteristics:**

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

Good access to A40 trunk road.

**Site Area:**  
 42.0ha

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

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

**Regionally Important Strategic Site**

**Sector Specific/Supporting Strategic Site Cluster**



**Name:** Thornton Industrial Estate Cluster

**Location:** 190681 207448

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

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

**Sector Focus/Unique Characteristics:**

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

**Site Area:**

41.2ha

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

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

**Sector-specific/Supporting Strategic Site Clusters**



**Name:** Blackbridge

**Location:** 192006 205444

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

Site is within the Haven Waterway Enterprise Zone.

**Sector Focus/Unique Characteristics:**

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

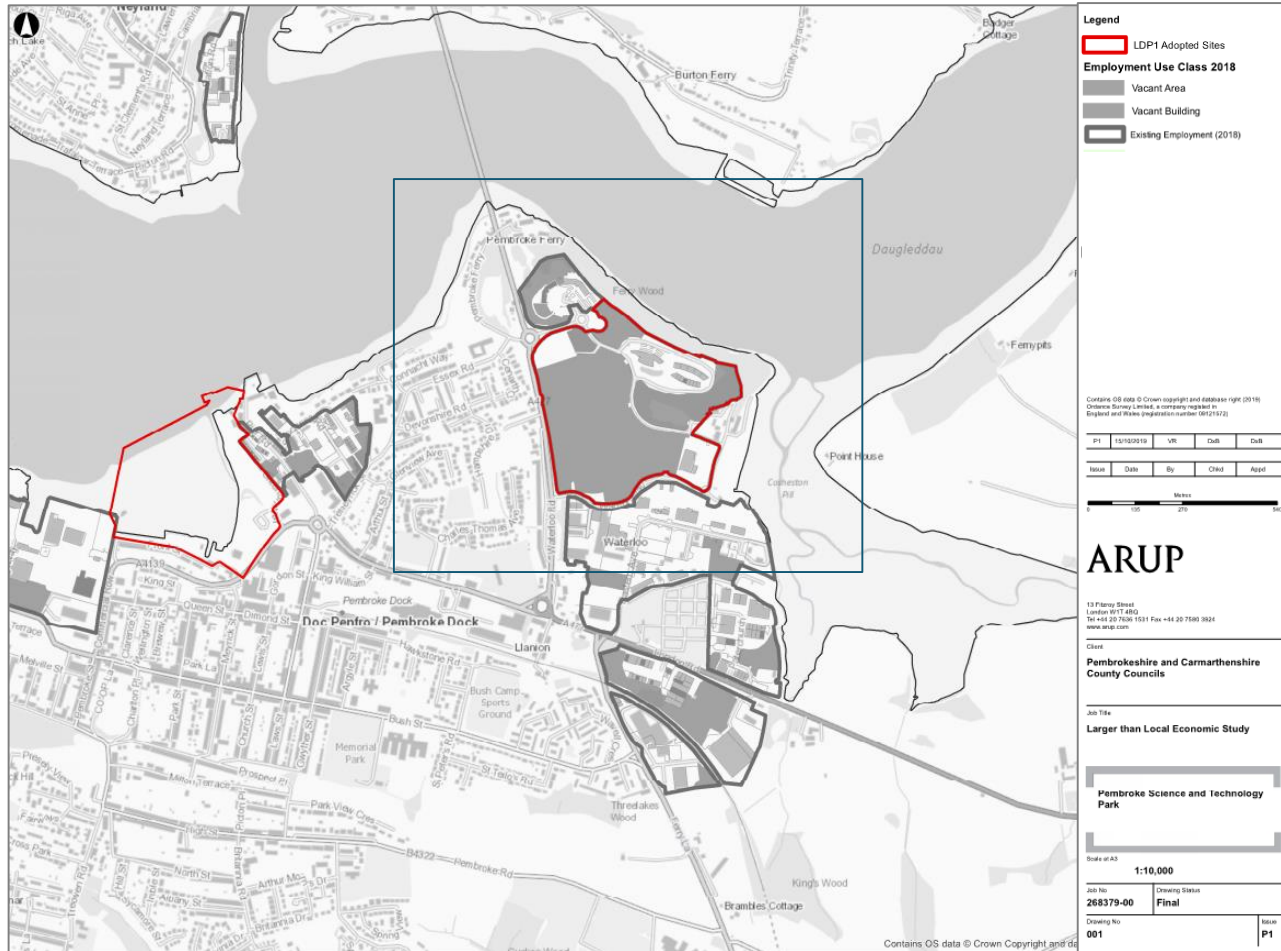
**Site Area:**  
**33.5ha**

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

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

**Regionally Important Strategic Site**





**Name:** Pembroke Science and Technology Park  
**Location:** 195881 203748

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

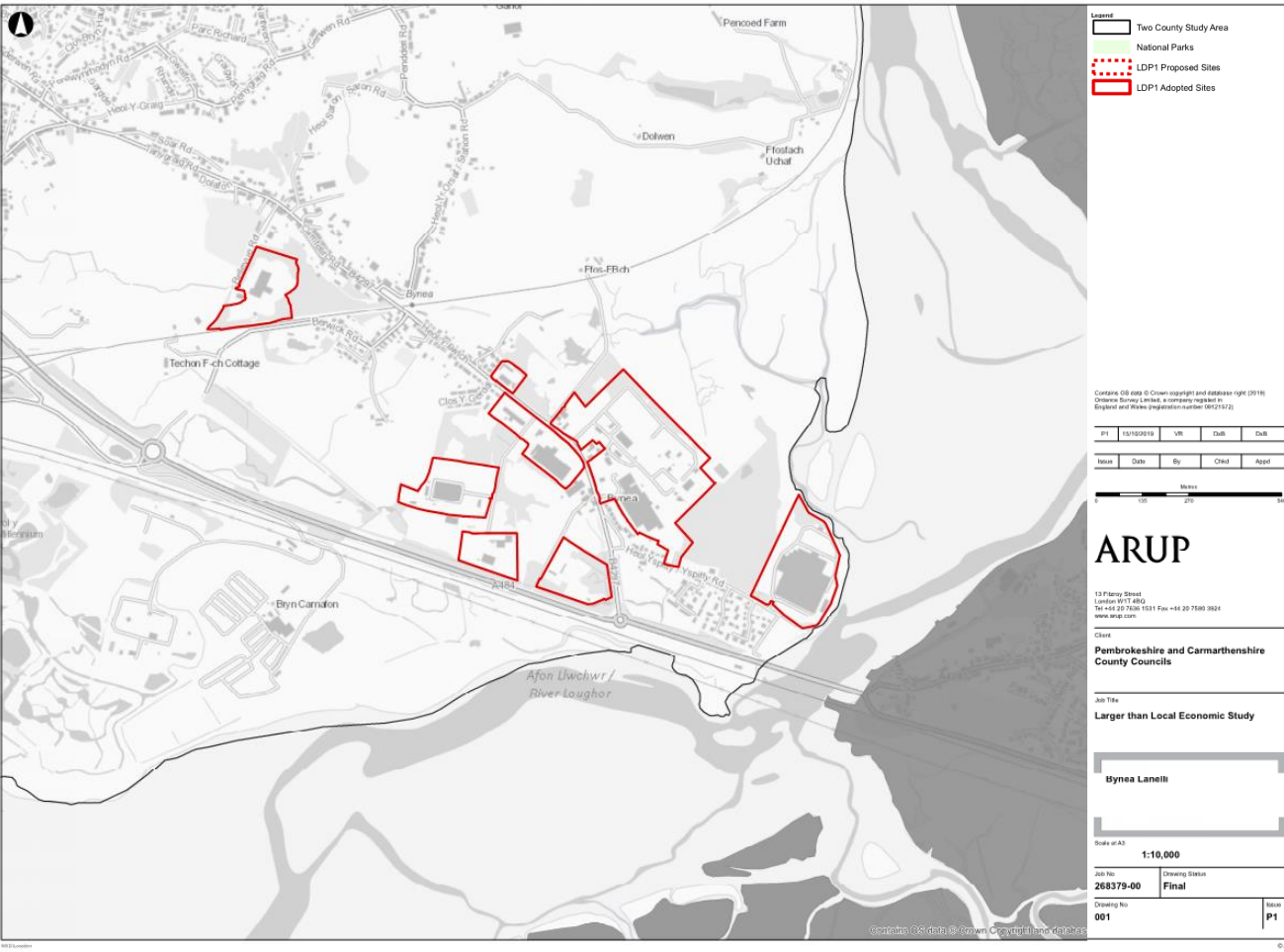
Site is within the Haven Waterway Enterprise Zone.

**Sector Focus/Unique Characteristics:**  
 Evidence of sectoral demand at the site for a clustering of employers associated with the marine energy sector.

**Site Area:**  
 45.9ha

**Most Relevant Broad Interventions:** INV1, INV2, INV4, INV5  
**Site Interventions:** Site review in order to ensure sufficient land for future development opportunity whilst also exploring / facilitating wider potential (e.g. renewable energy generation).

**Regionally Important Strategic Site**



**Name:** Bynea Llanelli  
**Location:** 255597 198512

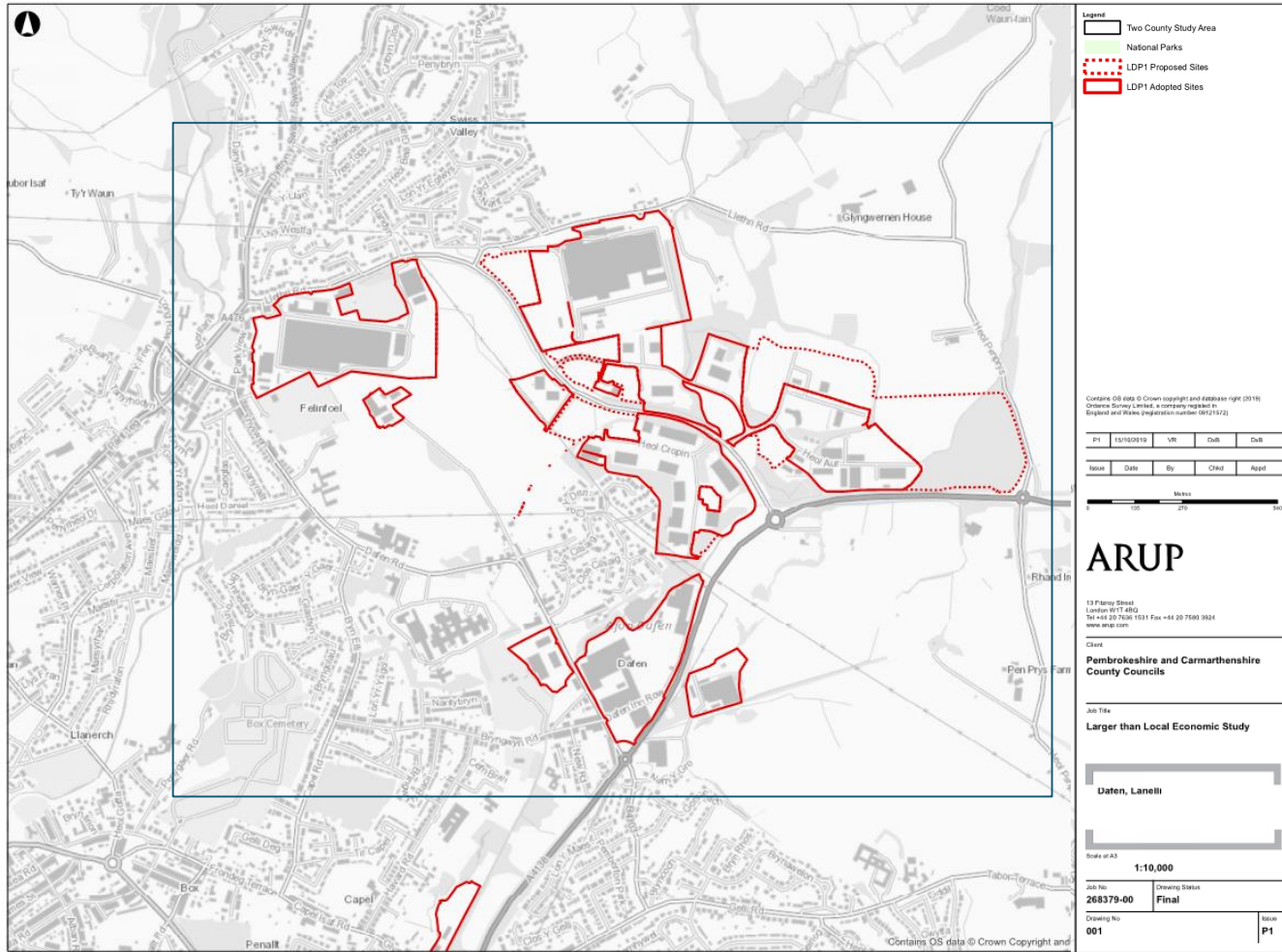
**Description:** Site is occupied by mixed employment uses (B1, B2, B8). Known redevelopment/reconfiguration potential due to the closure of the Schaeffler plant to the north east of the site. Evidence of companies which support larger manufacturing uses (e.g. Qualitek Engineering).

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

**Site Area:**  
 29.7ha

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

**Regionally-important Strategic Site**



**Name:** Dafen, Llanelli  
**Location:** 252749 202180

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

**Sector Focus/Unique Characteristics:**  
 Direct access to A4138 providing direct link to M4 motorway.

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

**Site Area:**  
 61.0ha

**Most Relevant Broad Interventions:** INV1, INV2, INV4, INV5  
**Site Interventions:** Site is known to have some ground condition constraints and work to understand / cost remediation of the site should be conducted should the site be promoted for strategic investment.

**Regionally-important Strategic Site**





**Name:** Cross Hands  
**Location:** 256826 212568

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

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

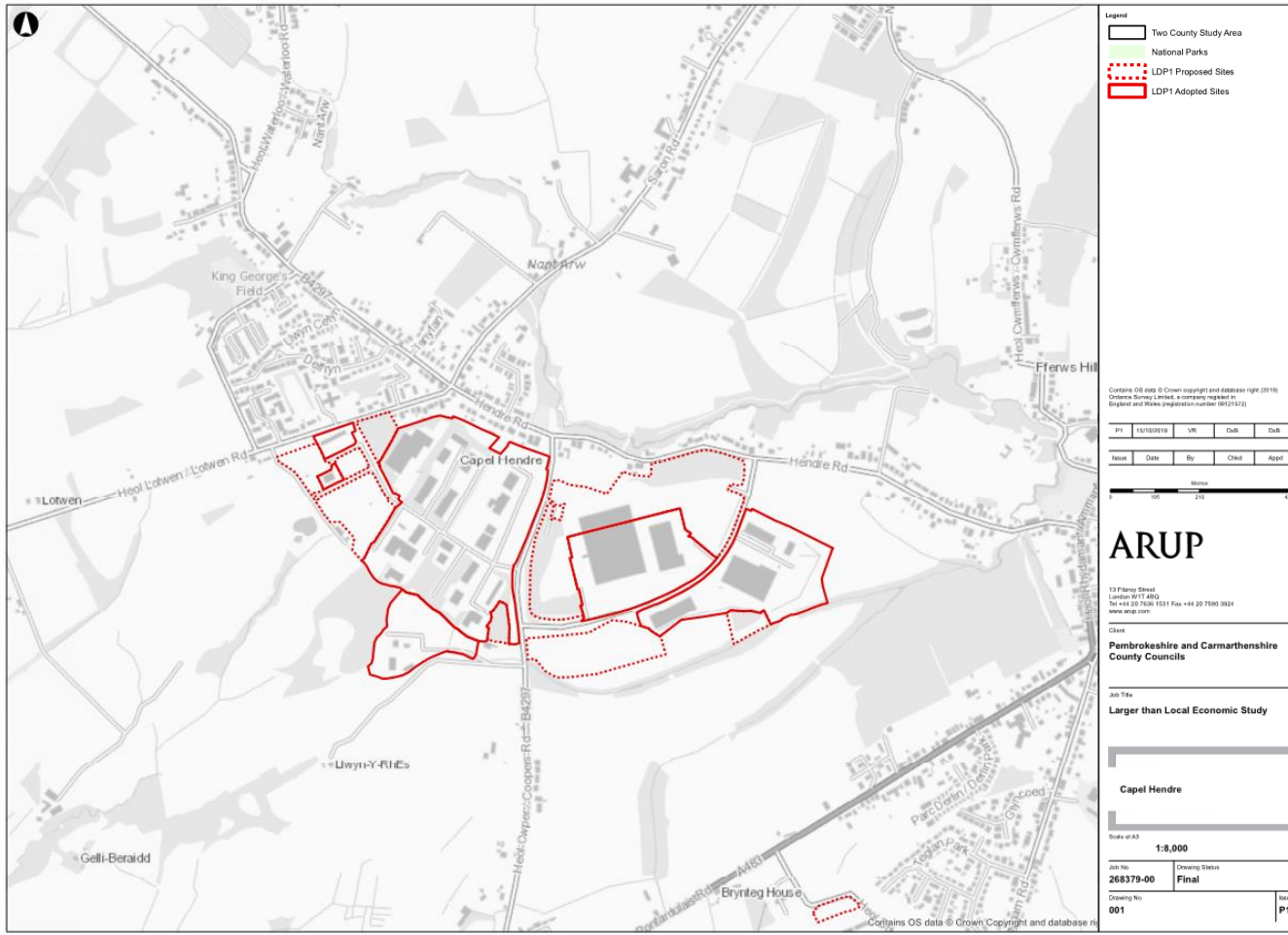
**Site Area:**  
 98.5ha

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

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

**Regionally Important Strategic Site**

**Sector Specific/Supporting Strategic Site Cluster**



**Name:** Parc Hendre  
**Location:** 259647 210990

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

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

**Sector Focus/Unique Characteristics:**

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

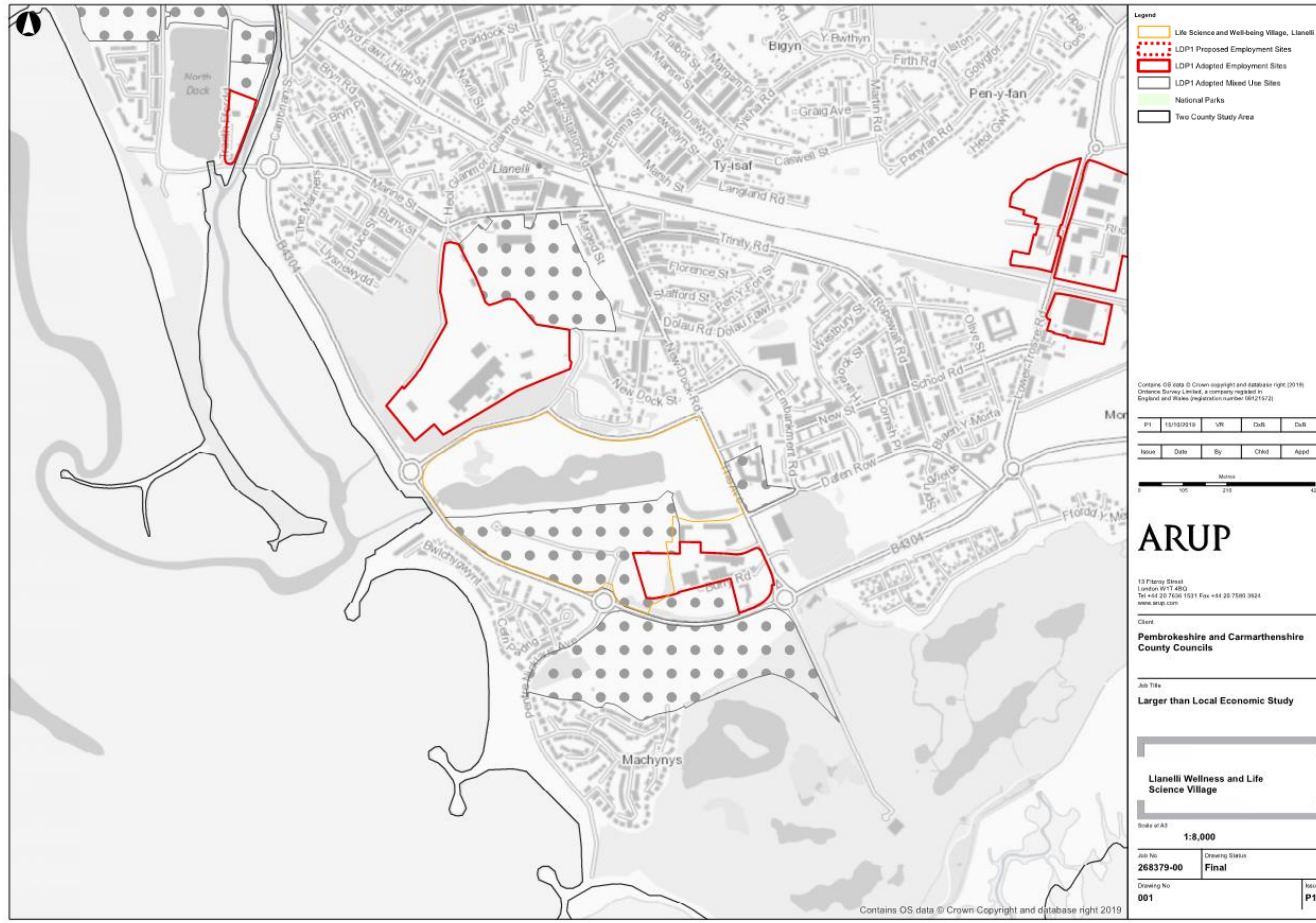
**Site Area:**  
73.9ha

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

**Site Interventions:** Sites relationship with Cross Hands and key sectors requiring strategic road access to be explored.

**Regionally Important Strategic Site**

**Sector Specific/Supporting Strategic Site Cluster**



**Name:** Llanelli Wellness & Life Science Village

**Location:** 259647 210990

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

**Sector Focus/Unique Characteristics:**

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

**Site Area:**  
18.6ha

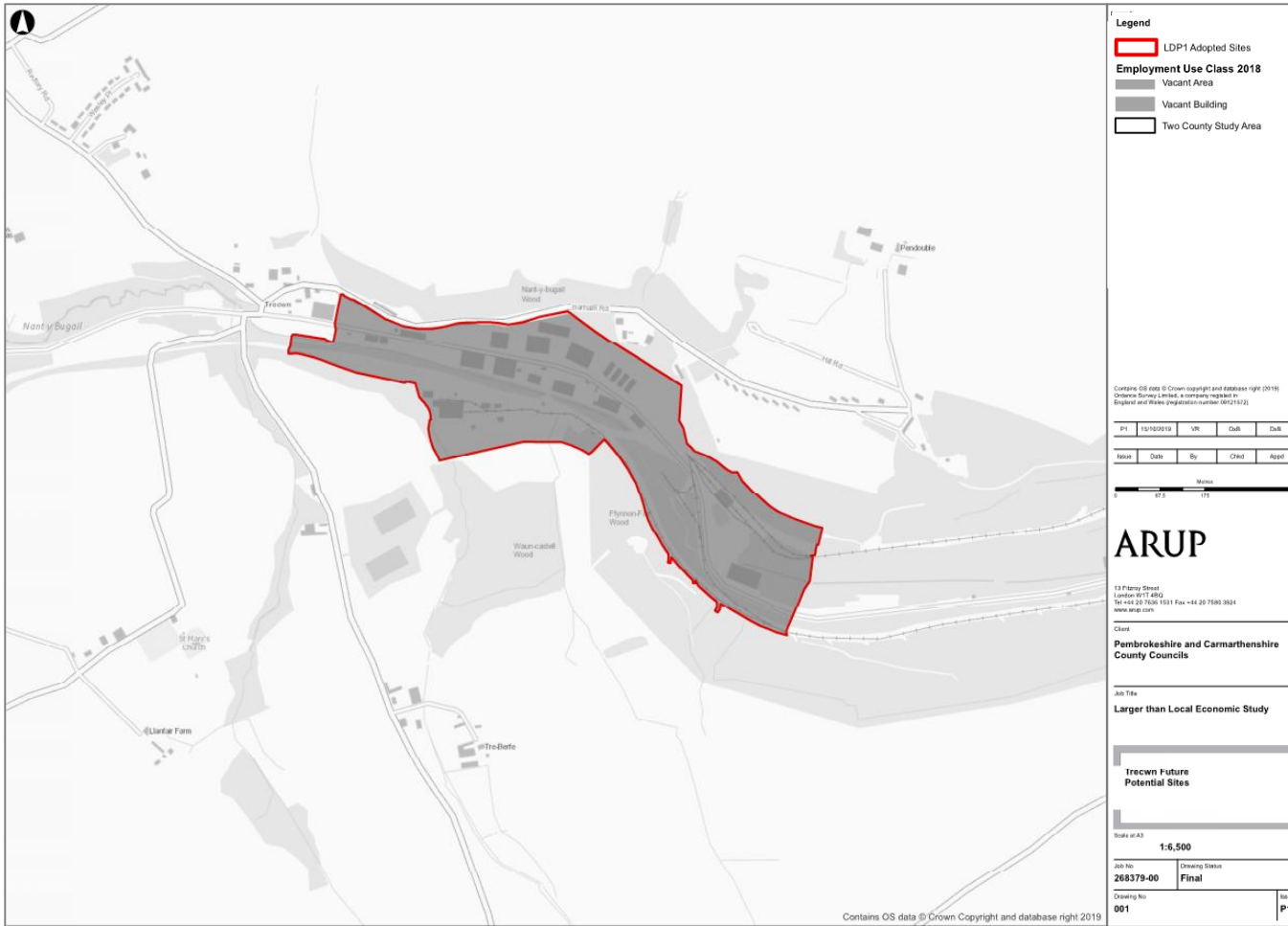
**Most Relevant Broad Interventions:** INV1

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

**Regionally Important Strategic Site**

**Sector Specific/Supporting Strategic Site Cluster**

# Future Potential Sites



**Name:** Trecwn  
**Location:** 197329 232541

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

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

**Site Area:**  
**21.2ha**

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

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

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

**Future Potential Site**

