



# Review of Employment Land in St. Helens to 2027

September 2011



Prepared for  
**St.Helens BC**

## Revision Schedule

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01	15/9/11	Draft Report	Principal Regeneration		Associate URS Scott Wilson
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# 1 Background

- 1.1.1 St.Helens Council is currently amending its Core Strategy for final examination. The Planning Inspector appointed to consider this has raised some concerns with regard to the Borough's ability to provide sufficient deliverable warehousing and distribution (B8) employment land to meet the needs of the Borough going forward within the plan period up to 2027 (assumed that this represents a period of 15 years).
- 1.1.2 These concerns were raised in the Planning Inspectors note in July 2011 and there was a formal response from St Helens Council dated 27 July 2011. Following an exploratory meeting which discussed these concerns with the appointed inspector on 2<sup>nd</sup> August 2011, St Helens Council requested additional work to assess the current and projected market demand and supply up to 2027 in the Borough for premises and sites focusing on the B8 distribution sector.
- 1.1.3 A key element of the work has been a review and update of the St Helens Employment Land and Premises Study (May 2011) which was prepared over a period of 15 months from January 2010. This report was prepared in response to findings contained in the Employment Land Study produced in April 2009 by Regeneris. It was Regeneris's view at that time that the quantum of existing B8-type allocations (together with any additional brownfield sites identified through the Call for Sites exercise) would be insufficient to meet likely future demand for B8. The study forecast that demand for land for B2 was not expected to be significant. The main purpose of the St Helens Employment Land and Premises Study undertaken by ourselves was therefore to consider which existing B2 sites in use could be used for B8 in the event that they become vacant. Our study developed into a more thorough review of all supply of land for all employment use categories and provided a quantitative and qualitative evidence base to inform land supply assumptions for the purposes of the Core Strategy.
- 1.1.4 In response to the concerns raised about the adequacy of B8 land supply this report provides the following assessments:
- 1.1.5 **Chapter 2** contains a market analysis for the small to medium and large scale general industrial (B2) and B8 markets in St.Helens and the North West region. This provides data on recent take up of units, developer/occupier requirements, commentary on likely future demand and data on availability of sites across the North West for large scale B2 and B8 uses.
- 1.1.6 **Chapter 3** provides analysis of the supply of new and second hand B2 and B8 premises, sites suitable for large scale B2 and B8 development in the North West and in the boroughs surrounding St.Helens.
- 1.1.7 **Chapter 4** considers and updates the Portfolio of Employment Sites identified in the St Helens Employment Land and Premises Study (May 2011) and assesses more closely their suitability and deliverability in meeting the needs of the Borough. The result of this re-assessment is a revised set of land supply figures. This takes into account a number of changes including:
- New employment land as a result of a representations made by a private sector land owner
  - Sites which have been or are subject to ongoing development
  - Critical review of sites avoiding any optimism bias as to likelihood development
  - B2 and B8 Market Overview

1.1.8 The report has been prepared by:

- Jon Thorne, MRICS, Director at CBRE. Jon has 10 years private sector experience in office, industrial and warehouse agency sectors in the North West
- Mark Phillips MRICS, Principal Regeneration Surveyor at URS Scott Wilson. Mark has 15 years public and private experience in planning, development and regeneration sectors in the North West.

## 1.2 Sources of data for this report

1.2.1 Our assessment of the supply and demand of employment floorspace and land in the North West region is drawn from in house CBRE records and market knowledge.

1.2.2 The assessment of the supply of land and premises in St.Helens draws heavily from our previous study compiled jointly by CBRE/URS Scott Wilson - St Helens Employment Land and Premises Study (May 2011) and supplemented by in house CBRE records and market knowledge.

## 1.3 Differentiating the supply of premises

1.3.1 It should be noted that the basis of assessment of supply and demand in the B2/B8 market is split into three distinctive sizes which are as follows:-

- **Small sized industrial/logistics units** – the small sector comprises units from 1,000 sq ft (93 sq m) – 15,000 sq ft (1,394 sq m) generally in multi-let estates with a mix of B2 and B8 uses.
- **Medium sized industrial/logistics units** - the medium sized sector comprises units of 15,000 sq ft (1,394 sq m) up to 100,000 sq ft (9,290 sq m)
- **Large scale industrial/logistics buildings and sites** – generally comprises large industrial/distribution facilities of circa 100,000 sq ft (9,290 sq m) and over up to in some cases in excess of 1 million sq ft (92,900 sq m). Properties that cater for this market tends to be existing buildings within the above size range or available sites of over 5 acres (2 hectares) which could easily accommodate such buildings to be constructed on them. This market predominately involves large scale B8 distribution operations but can in some cases involve larger scale B2 manufacturing.

1.3.2 Based on our previous work we have assessed that 15% of the current overall supply in the Borough is large scale B8 logistics premises. It is difficult to accurately assess the proportion of existing premises which fall into the small and medium sized sectors although an analysis of rateable value data held by the Valuation Office Agency for 2008<sup>1</sup> shows the following splits for all employment premises in the Borough:

- B1 offices – 11%
- B2 industrial – 38%
- B8 logistics – 51%

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<sup>1</sup> Commercial and Industrial Floorspace and Rateable Value Statistics (2005 Revaluation), 2008 – Valuation Office Agency as amended by St.Helens Council

## 1.4 What constitutes a good site for large scale B2/B8 use?

- 1.4.1 Developers looking for sites for large industrial/distribution facilities have the same consideration as occupiers in that the sites have to be attractive to the end users/operators/companies who would occupy a building. Therefore the geographical and general methodology employed by developers is to select sites meeting the following criteria:
- Close to motorway junctions for ease of access for vehicles
  - Close to ports and rail freight terminals for receiving/delivering products
  - Single ownership sites to enable delivery
  - Sites within close proximity and centrally located within large regional conurbations (South East, Midlands, North West, Yorkshire)
  - Sites in areas where there is a plentiful supply of skilled and low cost labour
  - Sites within close proximity to other large occupiers specifically manufacturing
  - Sites that do not require significant infrastructure to make them deliverable
- 1.4.2 In many cases developers will compromise on some of the above but generally they will not compromise on locational aspects as these are ultimately the main driver for occupiers making decisions on preferred sites.
- 1.4.3 If the above criteria are applied to St Helens then developers will seriously consider sites close to the M6/A580 and M62 junctions for large scale industrial/distribution development, however, much of the land surrounding these locations falls within the green belt.

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## 2 MARKET ANALYSIS

### 2.1 SMALL TO MEDIUM SCALE B2 & B8 MARKET – ST HELENS & NORTH WEST SUB REGION

- 2.1.1 Generally across the North West, with the economic downturn, this market sector has struggled as smaller more local/regional companies have been hit the hardest by the recession. As such we have seen increased void rates on multi-let estates caused by business failure and also demand has been hit (enquiry levels generally down by 25-30%) as smaller or new companies tend to not have support from banks and financial means to move new premises or expand existing operations.
- 2.1.2 Over the last 3 years this has resulted in many smaller units becoming vacant, business rates imposed on vacant properties and combined with pressure from funders, landlords have been forced to reduce rents and increase incentives to try and re-let vacant units. Generally headline rental levels have reduced by between 25-30% and incentive levels offered to occupiers have doubled from 1 month rent-free per year of lease commitment to 2 months rent-free per year of lease commitment.
- 2.1.3 Demand in this market sector still remains slow but has recently started to improve and units are starting to re-let. This is generally down to some renewed optimism from occupiers and the fact that landlords have become more flexible on pricing and lease terms.
- 2.1.4 In terms of supply, there has been very limited new development of units in this sector over the last 3 years apart from those schemes that were committed or started prior to the downturn and at many of these schemes units remain vacant 2 to 3 years after the schemes were completed.
- 2.1.5 With this supply of newer units still available and vacant units remaining on older second-hand multi-let estates we would generally not expect much speculative new development (supply) for the foreseeable future. However, this will change as the supply slowly diminishes and developers are starting to earmark sites for development for when the market materially improves which is likely to be 18 months to 2 years away.
- 2.1.6 Specifically in St Helens, the areas which provide for this market sector tend to be around Haydock Industrial Estate and Rainford Industrial Estate in the North (close to the East Lancs A580 and M6 motorway), Lea Green and Reginald Road in the South (close to the M62 motorway) and Sherdley/Pocket Nook/Parr Street industrial areas close to the town centre.
- 2.1.7 The supply in the industrial areas closer to the town centre is mostly older accommodation with some smaller new or refurbished schemes and generally caters for more localised demand from local and established St.Helens companies. Demand appears to remain steady with limited void space except for the older poorer quality units which are no longer suitable to occupiers. Estates in areas such as Haydock and Lea Green do cater for some localised demand but these areas can also compete within the sub-region to attract occupiers due to their positioning close to the M6/East Lancs (Haydock) and M6 (Lea Green) and as such demand is normally strongest in these areas.
- 2.1.8 The only new speculative developments in the borough over the last three years have been at Haydock, Roundwood Drive (Sherdley Business Park) and Ravenhead Road and there still remain vacant units on all three developments. This level of activity is unsurprising given economic conditions although a number of purpose built developments have been completed over the past three years.

- 2.1.9 There is a perception that many occupiers in units around the town centre occupying older units would move to newer units if they were available. This is supported by the fact that in 2007 at the height of the market a new small unit scheme by Priority Sites at Ketterer Courts, Jackson Street was pre-let/sold to occupiers before being developed.
- 2.1.10 Northern Trust is shortly to start on site on a small unit scheme at a site on Gerrards Bridge (central St Helens). There are also developers in discussions with Pilkingtons in respect of new industrial development as part of their redundant land holdings in the North of the town. New developers have also been found to complete a half finished development on Ravenhead Road. All of this is positive for St.Helens and it remains the case that developers will consider new development for this sector on sites close to the main arterial roads A580, St Helens Linkway and motorway junctions or close to existing occupiers on accessible sites closer to the town centre.

### **Conclusion**

- 2.1.11 Demand for units/sites in the small to medium sized industrial market sector has struggled over the last 3 years although there have been signs of improvement recently with some developers bringing forward smaller unit schemes such as at Gerrards Bridge and Ravenhead Road. However, demand and values still remain fragile due to economic conditions so any new speculative development will only be on prime sites and facilitated by pre-lets, cheap land and possibly the provision of grant funding.

## **2.2 LARGE SCALE INDUSTRIAL & LOGISTICS – ST HELENS & NORTH WEST SUB REGION**

### **2.3 Demand**

#### **Take up of floor space – 2008 to 2011.**

- 2.3.2 Figure 1 below provides a summary of take-up figures for large industrial buildings (and sites where design and build) from 2008 up to 2011 (with projected figures up to the end of this year).
- 2.3.3 This shows the trends in take-up of large industrial/distribution buildings and sites in the North West region and the figures are broken down into new/modern buildings, second-hand buildings and design and build (sites).

FIG 1 – DEMAND SUMMARY TABLE - Breakdown of Industrial Take-Up 2008-2011  
(Buildings of circa 100,000 sq ft (9,290 sq m) and over).

Year	Modern & New (M sq ft)	No. of Deals	Second-hand (M sq ft)	No. of Deals	Design & Build (sq ft)	No. of Deals	Total (sq ft)	No. of Deals
2008	0.75	5	0.88	7	0	0	1.63	12
2009	2.12	7	1.39	9	0.21m	1	3.73	17
2010	1.19	4	2.67	13	1.34m	4	5.5m	21
2011 (up to Sept)	1.18	4	1.28	8	0.61m	2	3.08m (projected to be 3.50m by end 2011)	14

2.3.4 Appendix 1 provides a deal by deal breakdown of the take-up figures in Figure 1 for each year including analysis of the figures and deals.

### Commentary

2.3.5 General take-up in the North West region for large industrial facilities averages at between 3.0 – 3.5 million sq ft (0.279 – 0.325 million sq m) per annum. Take-up in 2008 was half that at around 1.5 million sq ft (0.14 million sq m), mainly as a result of the credit crunch and the fact that most companies were forced to put property moves or expansion plans on hold.

2.3.6 Despite the effects of the 2007/08 downturn, the larger industrial market has performed well in terms of deals being done and take-up with figures for 2009 and 2011 remaining at the average levels but with a notable spike to record levels in 2010.

2.3.7 Demand in the larger industrial/distribution sector for the North West region has been strong over the last few years mainly due to the take-up of speculative buildings left over from the development boom around 2005/2006. In recent years occupiers have acquired buildings on very favourable terms (such as B&M Bargains, Matalan and Kimberley Clark) and this was the main reason for the spike in take-up in 2010.

2.3.8 Recent demand has come from retail or food sectors (either direct or through third party logistics operators) as these markets have continued to perform well. Examples of such occupiers taking large facilities in the region include Asda (Warrington), Waitrose (Chorley), JD Sports (Rochdale), Regatta Leisure (Ellesmere Port), B&M Bargains (Speke), Matalan (Knowsley), Home Bargains (Knowsley), Tesco (Widnes), Asics (Warrington), Kimberley Clark (Chorley), M&S (Stoke), Next (Warrington), Gap (Stoke), DHL (Knowsley - for Burtons Foods ), Great Bear (Wirral- for Nestle).

2.3.9 We expect demand to continue to be relatively healthy and settle at the more traditional levels of 3.0 - 3.5 million sq ft (0.279 – 0.325 million sq m) per annum. There still remains in the market some large occupier requirements and the emergence of mail order/internet sales companies is also generating new large distribution requirements. It is reported that Argos are close to finalising terms with Pro Logis/Stobart for a 111,480 sq m B8 unit at the rail linked 3MG development in Widnes.

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Added to this is the growth in the waste and recycling sector with companies starting to acquire industrial buildings and sites for these operations.

- 2.3.10 In terms of the geographical dynamics of demand, it is historically been fairly well spread across the North West region. Demand for warehousing space by the large retailers is normally driven by the supply chain requirements of specific operators i.e. the timing requirements of the product being brought into the warehouse (normally in containers from point of origin), where they are sorted, picked and packed and then sent on for delivery to a point of sale (retail stores). Given that every business operation is different, it is difficult to say that one location fits all, however, generally the trend in the North West for distribution facilities is to be close to the points of origin for product coming into the UK (ports and rail terminals) meaning sites on Merseyside are popular given the proximity to the Port of Liverpool and Widnes Railfreight Terminal. Merseyside is also popular given the availability of low cost labour and the skills set and this is demonstrated by the occupiers in the area such as Home Bargains, Tesco, QVC, Burtens Foods, Matalan, B&M Bargains, Premier Foods, Co-op, Sainsbury's and Princes Foods.
- 2.3.11 The M6, M62 and A580 corridors in the North West are popular locations for receiving products by road and then servicing stores and the population in the northern region. St Helens is right in the heart of the region in this respect with access to M62 to the South, M6/A580 to the North and relatively good access to the Port of Liverpool and the Rail Freight terminals.
- 2.3.12 Specifically in St Helens, over the last 5 years there has been limited take-up of large industrial buildings over 100,000 sq ft (9,290 sq m) apart from the sale of 175,000 sq ft (16,260 sq m) Chill Out distribution facility at Abbotsfield Road to 151 Products and a letting to Robert McBride Ltd in 2008 for a B8 unit of circa 100,000 (9,290 sq m) sq ft at Lea Green in 2008.
- 2.3.13 If good quality sites and buildings were available in the Borough we would anticipate more take-up and given the locational benefits there would still be demand for sites or buildings close to the M6 and M62 motorway junctions. This is supported by the fact that large operators such as Sainsbury's, Co-op (formerly Somerfield), Booker, The Book People and Palmer and Harvey all have regional distribution facilities in St Helens.
- 2.3.14 Developers still remain confident on the North West industrial/distribution market but we do not expect to see a return to any speculative development in the short term, rather developers will promote deliverable sites to attract occupiers on a design and build basis.
- 2.3.15 The projected growth of the Port of Liverpool and Rail Freight Terminals at Widnes and Knowsley coupled with the cost and environmental benefits of using such facilities as opposed to road freight, should provide the North West and especially Merseyside with a good base to maintain and increase demand for distribution operations. Many of the main manufacturing operators remain pretty secure in the region (the likes of GM Motors, Jaguar Land Rover, Kellogs etc having manufacturing operations based in the North West with need for storage and distribution facilities)
- 2.3.16 There are signs of renewed manufacturing requirements in the UK as costs of production in the Far East are increasing, the attractive value of the Pound and the quality of the finished product is normally better in the UK. It should also be noted that occupiers prefer where possible new/modern buildings in order to be more efficient in their operations or in the case of third party logistics operations in order to retain storage and distribution contracts from large companies. This should help to create more demand for sites for new build facilities with very little existing new buildings available. It will also make it more difficult to let or sell older second-hand warehouses that are becoming less appealing to occupiers.

2.3.17 Therefore with market demand expected to improve it will be important for the North West region to have a good supply of land to accommodate the demand. This will be especially true in the areas close to motorway junctions, ports or rail freight terminals.

## Conclusion

- The large scale B8 sector is expected to remain strong in the region for well located unconstrained sites
- Occupiers would consider St.Helens as a location for such development given good access to M62 to the South, M6/A580 to the North and relatively good access to the Port of Liverpool
- Take up in St.Helens in the large scale B8 sector has been limited in the last 5 years as there has been a restricted supply of sufficiently attractive sites compared to other locations in the North West

## 2.4 SUPPLY OF PREMISES

2.4.1 Figure 2 below shows current availability of new/modern buildings, second-hand buildings and development sites suitable for large scale industrial developments available in the North West sub-region.

FIG 2 – AVAILABILITY SUMMARY TABLE (over 100,000 sq ft)  
New/Modern Existing Accommodation – Less than 5 years old

DEVELOPER	ADDRESS	SIZE (SQ FT)	DESCRIPTION (MIN CLEAR HEADROOM)	TENURE/TERMS	COMMENT
New Capital Properties	Northern Gateway, Knowsley	148,000	(12m). Completed August 2007.	Leasehold £4.25 *	Currently under offer on a sale to an occupier.
Lasalle Investors	Road One Winsford	175,000	(12m). Due for completion spring 2009	Leasehold £4.75/ Freehold £60	
Prologis	Crewe	360,000	15m. 32 docks	Leasehold £4.75	Strong interest currently on a sale to an occupier.
Blue Planet	Chatterley Village, Newcastle under Lyme	387,762	15m. 38 docks. Eco building.	Leasehold £5.95	
Helioslough/CBRE Investors	415 @ Lymedale Cross, Newcastle under Lyme	414,834	Completed October 2007 (15m).	Leasehold £4.75/£60 *	
<b>Total New buildings</b>		<b>1,485,596</b>			

2.4.2 Given that the proposed deals at Knowsley and Crewe mentioned in the above table are expected to be finalised shortly this would effectively only leave 3 new or existing buildings available in the North

West providing just less than 1m sq ft of floor space. These remaining buildings are also all in the Stoke/South Cheshire area so would not really service the projected demand in the core North West region. Figure 3 below shows what existing second-hand buildings (over 5 years old) are available over 100,000 sq ft in the North West.

FIG 3 – AVAILABILITY TABLE.  
Second-Hand Existing Accommodation – Over 5 Years Old

OWNER/TENANT	ADDRESS	AREA	SIZE (SQ FT)	COMMENTS	TENURE/TERMS
Hagemeyer UK Ltd	Manor Park Runcorn	Cheshire	343,412	Built in 2002. 11.8m eaves. Expansion capability of 100,000 sq ft. Currently "under offer".	Leasehold £4.00
Ethel Austin Property	Austin Park Knowsley	Merseyside	425,000	second hand industrial facility on site of 36 acres	Leasehold/ freehold
Highcross	Big Rack, Knowsley	Merseyside	330000	refurbished distribution / industrial / warehouse facility – low quality.	leasehold
Hansteen	Trinity Park, Bootle	Merseyside	105,000	Modern Distribution facility with up to 5 acres of hard standing/open storage. Currently "under offer"	Leasehold/ freehold
Royal London	Atlantic Park, Bootle	Merseyside	180,000	major manufacturing/engineering building	Leasehold
BA Pension Fund	Lock Street, St Helens	Merseyside	200,000	Second-hand distribution facility	Leasehold/freehold
Threadneedle	Knowsley 200, School Lane, Knowsley	Merseyside	200,000	8m eaves – space being vacated by Matalan mid 2012	Leasehold/freehold
Invista	Big Apple, Appleton Thorn Trading Estate, Warrington	Cheshire	145,000	Modern Industrial unit. 12m eaves.	Leasehold. £4.75
Highcross	Vauxhall Warehouse, Ellesmere Port	Cheshire	403,111	Existing Vauxhall cars warehouse. 12m eaves dock loading. Extensive canopies not included in the area. Site area 21 acres. Split from 150,000 sq ft. Currently "under offer".	Leasehold or Freehold
Lynton Developments	One 100, Road One Winsford	South Cheshire	100,000	Refurbished 1970's building (7.5m eaves)	Freehold/Leasehold
AXA	Maximus Road One Winsford Industrial	South Cheshire	105,000	Modern Unit. (13m). 6 docks, 4 level. Fully racked	Leasehold £4.75 psf

Estate Winsford					
Tesco/Prologis	Midpoint 18 Middlewich	South Cheshire	185,000	High bay warehouse under lease to Tesco. 1990's build. Single yard. 12m eaves	Leasehold
Administrator c/o Sanderson Weatherall	Road One Winsford	South Cheshire	201,287	1970's shed - 5.6-9.5m eaves - 5 bay unit - inc 8,925 sq ft offices	Freehold - quoting £3.25 m
Bosal	Plant 21, Walton Summit Centre, Bamber Bridge, Preston, PR5 8AP	Lancashire	129,335	10m eaves. 24 dock level loading doors. Fully lit and heated. 1990s build	Freehold - £4.75 Million (£35 psf)
Credential Holdings	Hemfield Road, Ince in Makerfield, Wigan	Lancashire	183,000	1970's warehouse facility.6 m eaves	Freehold/leasehold
Graico	Potter Place Skelmersdale	Lancashire	100,000	6m eaves – former manufacturing facility.	Leasehold
Spencer Holdings	Pimbo Point Skelmersdale	Lancashire	100,000	5m eaves – refurbished former manufacturing facility	Leasehold/freehold
JJB	Martland Park Wigan	Lancashire	100,000	Constructed early/mid 2000:5. Currently “under offer”.	Leasehold
Beva Group	Magnum @ Walker Park Blackburn	Lancashire	250,000	1970's building. Refurbished (8to12m). To be sub-divided	Freehold/leasehold
Ventnor	Unit 69 Stakehill Industrial Estate Middleton	Greater Manchester	102,855	1980's warehouse (10m), 3 yards	Leasehold £4.50
Sainsbury	Unit 61 Stakehill Industrial Estate Middleton	Greater Manchester	190,166	1970's warehouse facility.10 m eaves	Leasehold
Tesco	Stakehill Industrial Park Middleton	Greater Manchester	305,000	Chilled unit. 1980s build. 6-10m	Passing rent £6.42
Royal London	Satellite 330, Satellite Park, Chadderton, Oldham	Greater Manchester	332,956	Refurbished BAE warehouse. 9.5m eaves. Docks.	Leasehold £3.95.
Private Investor	Causeway Broadway Business Park Oldham	Greater Manchester	126,343	Former HMSO. Constructed 1996. 8m eaves. Cross docked	Freehold/Leasehold - Under Offer @ £37
<b>Total 2nd hand buildings</b>			<b>4,573,887</b>		

2.4.3 Of the 22 existing second-hand buildings in the North West region, 4 are currently “under offer” with deals going through and as such the availability by the end of the year should be around 3.5m sq ft (325,150 sq m). This remaining space mainly comprises older second-hand accommodation which is not particularly attractive to occupiers.

2.4.4 There is only one building available in St Helens, two in Skelmersdale, one in Wigan but none in Warrington or Halton. There are however three buildings still available in the neighbouring borough of Knowsley.

## 2.5 SUPPLY OF LARGE SCALE B2/B8 SITES IN THE NORTH WEST (EXC. CUMBRIA)

2.5.1 Figure 4 below sets summarises the land supply of large scale B2/B8 sites in the North West.

FIG 4 – Schedule of Sites in the North West Suitable for Large Industrial/Distribution Development

TOTALS					
	Brownfield Site (acres)	Outline Planning Consent (acres)	Allocated for Development	Acres	Hectares
Merseyside	59	200	72	331	134
Cheshire	55	200	140	395	160
Lancashire	0	74	206	280	113
Greater Manchester	50	162	240	452	183
<b>Total</b>	<b>164</b>	<b>636</b>	<b>658</b>	<b>1,458</b>	<b>590</b>

2.5.2 Appendix 2 provides a fuller analysis and breakdown of the sites included in Figure 4 across the sub regions of the North West excluding Cumbria and this also provides some analysis and comment on each individual sub region.

2.5.3 If we assume based on previous take up an average of 3M sq ft (278,700 sq m) per annum take-up in the North West up to 2027 then the region needs to provide around 2,250 acres (911 hectares) to accommodate 45m sq ft (4.18m sq m) of floorspace (based on a 20% development density) of large scale industrial/distribution development land over the next 15 years. Fig 3 above shows there is currently a projected shortfall in supply of 74 hectares (792 acres) in the region although our view is that this shortfall is medium/long term (10 to 15 years) in nature as there is a healthy, deliverable short to medium term supply.

2.5.4 Appendix 2 finds that in terms of immediate deliverability there is 675.5 acres (273 ha) of land for large scale B2/B8 uses as follows:

- Cheshire – 225 acres (92 ha)
- Merseyside – 190 acres (77 ha)

- Greater Manchester – 182.5 acres (84 ha)
- Lancashire – 108 acres (44 ha)

2.5.5 Based on recent take up of floor space shown in Figure 1 it seems likely that all the limited new/modern buildings in the North West will be occupied within the next 12 months and there is likely to be substantial take up of reasonable quality second-hand space over the next 2 years. This will no doubt lead to design and build transactions going forward and as such the evident availability of deliverable sites suitable for accommodating large scale industrial/distribution development will be vitally important to occupiers and developers alike. Local Authorities will however need to consider and address where possible the deliverability of the remaining land identified in Figure 4 and Appendix 2 to meet likely need/demand up to 2027.

## 2.6 SUPPLY OF LARGE SCALE B2/B8 SITES IN BOROUGHES SURROUNDING ST.HELENS

2.6.1 The supply of large scale development sites in local authorities close to St Helens for B2/B8 uses is identified below using Appendix 2 as a source:-

FIG 5 – Schedule of Available Sites in Surrounding Boroughs to St Helens

Borough	Number of Sites	Total Size (acres)	Potential Total	Available immediately (acres)	Require Infrastructure Expenditure (acres)	Comments
Knowsley	3	60	1.1M	20	40	1 site deliverable immediately. The other 2 have development issues.
Halton	4	165	3.58M	70	95	50 acres expected to be removed with a potential 1M sq ft pre-let close to being agreed.
Sefton	2	15	0.5M	15	0	Land at Port of Liverpool available to port related occupiers.
Warrington	4	105	2.35M	90	15	Omega North site available – enabling road infrastructure reqd. as part of first phases.
Lancashire (Wigan & surrounds)	4	185	3.35M	75	10	It is expected that the 100 acre South Lancs site will not progress.
Liverpool	4	81.5	1.8M	81.50	0	The Speke sites can accommodate B8 uses but the location makes these sites more slightly more suitable for B2 use.

2.6.2 Figure 5 shows that there is 351.5 acres (142 ha) of land in St. Helens neighbouring boroughs that can immediately cater for demand for large scale industrial demand and an additional 260 acres (105 ha) beyond this..

## **Conclusion**

- In terms of supply of large scale B2/B8 sites our analysis identifies 590 hectares of which 273 hectares are immediately deliverable representing adequate supply of large scale B2/B8 sites in the short to medium term (0 to 10 years)
- There is currently a projected shortfall in supply of 74 hectares (792 acres) in the region although our view is that this shortfall is medium/long term (10 to 15 years) in nature. Beyond this, constraints on sites will need addressing and new supply will need to be identified.
- In the boroughs that border St.Helens there are 142 hectares of immediately deliverable land suitable for large scale B2/B8 development – representing a quarter of regional supply. Our view is that this provides adequate supply of large scale B2/B8 sites in neighbouring boroughs in the short to medium term (0 to 10 years)

## 3 SUPPLY OF B2/B8 LAND IN ST.HELENS UP TO 2027

- 3.1.1 This chapter considers and updates the supply findings identified in the St Helens Employment Land and Premises Study (May 2011). We have reviewed in particular *Appendix 6: Table A6: Development sites identified and suggested uses*. We have undertaken an up to date assessment of the suitability and deliverability of development sites in meeting the needs of the Borough up to 2027. This has been undertaken in response to the Inspectors' concerns with regard to the Borough's ability to provide sufficient deliverable warehousing and distribution (B8) employment land to meet future need. We have undertaken a critical review of sites avoiding any optimism bias as to likelihood of development
- 3.1.2 The result of this updated assessment is a set of land supply figures which are set out below in table 3.1. These are drawn from a site by site assessment set out in Appendix 3. The May 2011 assessment found that there was 95.67 hectares of development land in the Borough whereas this report finds that there is 86.12 hectares of development land in the Borough.
- 3.1.3 Examples of changes identified in this report compared to the St.Helens Employment Land and Premises Study (May 2011) include:
- New employment land as a result of a representations made by a private sector land owner (site AA1 Sankey Valley Industrial Estate)
  - Sites which have been or are subject to ongoing development and therefore now excluded from supply forecasts

### 3.2 B2 and B8 Market Overview

- 3.2.1 Much of the supply identified in the borough lends itself to servicing small/medium scale need for B2/B8 uses although there are three sites which are in locations close to the strategic highway network and of sufficient scale to be of interest to the large scale B8 sector.
- 3.2.2 It is difficult to differentiate between the small/medium scale supply identified in terms of suitability specifically for B2 or specifically for B8 use as they tend to be suitable for both. Market forces will determine the actual use although the local planning authority and Core Strategy can influence this by monitoring/policy implementation to ensure that B8 demand in particular can be met and that B2 need as it transpires (although it is not forecast to occur based on work undertaken in the Employment Land Review by Regeneris 2009) can also be met.
- 3.2.3 In order to ensure that the medium/long term supply is deliverable it will be critical that these sites have constraints addressed and St.Helens Council (just like other local authorities in the north west facing the same situation) has a role to play in preparing development briefs, considering ways to address infrastructure issues such as CIL, engaging with Local Enterprise Partnerships, use of Local Asset Backed Vehicle<sup>2</sup> et cetera..
- 3.2.4 In terms of large scale B8 needs this will mostly be met on sites outside the borough and an adequate short to medium term supply of this has been identified in Figure 5.

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<sup>2</sup> a form of public and private sector partnership that allow public sector bodies to use their assets (usually land and buildings) to attract long-term investment from the private sector in order to deliver socio-economic development and regeneration

Table 3.1 Assessed land supply in St.Helens to 2027

	<b>B1(a) offices (ha)</b>	<b>Small/Medium Scale B2/B8 (to accommodate units up to 9,290 sq m/100,000 sq ft)</b>	<b>Large Scale B2/B8 (to accommodate units in excess of 9,290 sqm/100,000 sq ft)</b>	<b>TOTAL (ha)</b>
<b>Immediately deliverable in the short term (0 to 5 years)</b>	11.15	24.62	10.45	46.22
<b>Constrained and potentially deliverable in the medium /long term (6 to 15 years)</b>	0.00	34.9	5.0	39.90
<b>TOTAL (ha)</b>	11.15	59.52	15.45	86.12

3.2.5 15.45 ha (38.16 acres) are identified as suitable for large scale B2/B8 industrial development within St Helens of which 10.45 ha (25.8 acres) is judged to be immediately deliverable and is described below:

- 5 ha at the Pilkingtons site close to the A580 (identified as C4 in the St Helens Employment Land and Premises Study (May 2011) – the site is of sufficient scale and is located close to the A580, leading to the M6 motorway but has deliverability (infrastructure and access) issues.
- 3.46 ha at Kilbuck Lane at Haydock Industrial Estate (identified as W9 in the St Helens Employment Land and Premises Study (May 2011)) although this site is not currently being marketed.
- 6.99 ha at Elton Head Road (adjacent to the existing Somerfield/Co-op depot) - (identified as W9 in the St Helens Employment Land and Premises Study (May 2011))

3.2.6 St Helens has a limited supply of sites that can accommodate demand in the large industrial/logistics market sector although the surrounding areas of Warrington, Widnes, Knowsley, West

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Lancashire and Wigan do have sites immediately available where facilities can be realistically delivered to occupiers. That said, future supply levels of sites in the North West seem to indicate that current supply may fall short of projected demand up to 2027.

- 3.2.7 Overall in terms of supply there are a good number of available sites within St Helens that are suitable for meeting the demand for industrial space in the small to medium sized market sector within the plan period. A number of these sites particularly in the constrained medium/long term category are less attractive to developers and occupiers alike in terms of road access, local environment and thought will need to be given as to how these sites can be de-constrained, promoted and presented to the market better to improve deliverability. This will be necessary if demand can be accommodated.
- 3.2.8 If it is proven at some future point (say in 5 years time) that the medium/longer term supply is not attractive enough and development is occurring elsewhere then St.Helens Council should consider new supply in sustainable locations to ensure it provides sites which will help to capture economic growth.

### 3.3 Change of use of B2 sites currently in use for future B8 use

- 3.3.1 The main purpose of the St Helens Employment Land and Premises Study which reported in May 2011 was to consider which existing B2 sites in use could be used for B8 in the event that they become vacant. This found that there was 40.11 hectares of land currently in B2 use which might be suitable for B8 redevelopment in the future.
- 3.3.2 We have reconsidered each of these sites and our findings are set out in Appendix 4 – the potential land area for part B8 re-use is now assessed as 32 hectares. In summary these sites can be described as potential windfall, however many of the sites identified are typically small to medium size (0 to 5 ha) and HGV access may be problematic as identified by St.Helens transport officers.
- 3.3.3 Redevelopment for B8 use in this category is likely therefore to be for small scale warehouse operations and for small to medium scale (500 to 7,500 sq m approximately) footprints. The sites identified are not large enough nor in suitable locations for large footprint, high bay warehousing. In addition refurbishment/modernisation may be the outcome over the plan period rather than redevelopment resulting in no significant additional new B8 stock.
- 3.3.4 For these reasons **it is not considered appropriate to count this land in use as part of an identified future land supply** although in reality and based on experience some of these sites are likely to be recycled for new small/medium scale B2/B8 development over the plan period.

### Conclusion

- St Helens has a limited supply of sites that can accommodate demand in the large industrial/logistics market sector – although 10.45 hectares are considered immediately deliverable.
- Overall in terms of supply there are a good number of available sites within St Helens that are suitable for meeting the demand for industrial/logistics space in the small to medium sized market sector within the plan period. We assess that there are 24.62 hectares immediately deliverable in the small to medium B2/B8 sector.
- A number of sites in the constrained medium/long term category are less attractive to developers and thought will need to be given as to how these sites can be de-constrained, promoted and

presented to the market better to improve deliverability. This will be necessary if demand can be accommodated.

- If it is proven at some future point (say in 5 years time) that the medium/longer term supply is not attractive enough, demand is not being fulfilled and development is occurring outside of the Borough, St.Helens Council should consider new supply in sustainable locations.

## 4 Appendix 1

### 2008 –11 Breakdown of B2/B8 floorspace take-up (Buildings of around 100,000 sq ft and over)

DEVELOPER	DEVELOPMENT	REGION	SIZE	SPECIFICATION	DETAILS	BUILDING AGE
Sladen Estates/Schroders	Road One, Winsford	Cheshire	148,000	12m eaves	Linpac – 15 year lease £4.50 – c. 12 months rent-free	NEW
Patrick Properties	Unit 17 Premier Park, Road One, Winsford	Cheshire	140,000	12m eaves	Let to ADS Ltd. New 15 year lease inc 10 year break - £5.05 psf includes 25,000 sq ft offices	NEW
Helioslough	R3 Revolution Park, Chorley	Lancashire	105,711	12 m eaves	Let to Wolseley at £5.05 per sq ft over 15 years, 10 year break, 5 months rent-free	NEW
Graftongate	Orion Park Crewe	Cheshire	150,000	C: 12m eaves	Let to Bentley Motors Ltd. £5.25 psf for 10 years. 12 months rent-free	NEW
Goodman	Pioneer 210 Ellesmere Port	Cheshire	210,000	C: 12m eaves	Prowell Ltd. £4.25 psf. 10 year lease. 12 months rent-free	NEW
Evans of Leeds	South 62 Winwick Quay Warrington	Warrington	179,200	C: 8m eaves	Let in November 08 to the Post Office (confidentiality signed) – c. £3.50 psf – 10 years. 16 months rent-free	SECOND HAND
Development Securities	Unit 9 Stonecross Park Golborne Wigan	Greater Manchester	145,000	Modern manufacturing facility (7.5m). Built 1998	Sold to Alopla for £8 million	SECOND HAND
SEGRO	Unit M2 Heywood Distribution Park	Greater Manchester	101,000	C: 9m eaves	JJB Sports at £4 psf for 1 year	SECOND HAND
SEGRO	Unit B9 Heywood Distribution Park	Greater Manchester	103,095	8m eaves	Let to Eddie Stobart for 5 years at £5.00 psf. 3 months rent-free	SECOND HAND
Remploy Ltd	Lea Green St Helens	Merseyside	109,556	10m eaves	Assigned to Robert McBride group Ltd. Substantial rent-free.	SECOND HAND
Bluebottle	Wirral Business Park	Merseyside	136,000		Uneek Clothing Ltd. £3.30 psf for 10 years with 24 months rent-free`	SECOND HAND
Threadneedle	The Bear Ditchfield Road Widnes	Merseyside	103,073	C: 8m eaves	Let to Gelert Ltd at £2.90 psf for 15 years.	

<b>TOTALS</b>	
Total New Building Take up	- 753,711
Total Second hand Building Take-up	- 876,924
<b>Total of Both</b>	<b>- 1,630,635</b>

2009

Deal by Deal Breakdown of Industrial Take-up (Buildings of around 100,000 sq ft and over)

DEVELOPER	DEVELOPMENT	REGION	SIZE	SPECIFICATION	DETAILS	BUILDING AGE
Prologis	Stafford	Newcastle under Lyme	127,845	New spec warehouse. 12m eaves. 11 docks.	Let to Wedgewood / £4.25 per sq ft / 5 years	NEW
Prologis	Stoke	Newcastle under Lyme	382,000	New spec warehouse. 12m eaves. 24 docks.	Let to M&S. £3.75 3 Year. Building fitted out	NEW
L & G	Fusion, Trafford Park	Trafford Manchester	208,000	(15m). 50m yard. Completed March 2006.	Biffa. 20 year lease. £4.75. 2.5 years reverse premium.	NEW
Valad	Broadway 21	Greater Manchester	184,348	New speculative warehouse (12m). Completion March 2008.	Jul 09 - Great Bear - 10 year Lease. £4.25 psf / £4.50 at review or OMR (higher of) c.21 Months rent free	NEW
RLAM	Pioneer Point	Cheshire	236,000	New speculative warehouse (18m). Completion March 2005.	Oct 2009. Let to Interserve 5 year lease , 2 year break. £3.95 per sq ft	NEW
Rockpoint	The Vault	Merseyside	618,839	New speculative warehouse (15m). Completion March 2006.	Nov 2009. Sold to B&M Bargains. £15.5 Million	NEW
Gladman	Manor Park 360	Merseyside	367,821	New speculative warehouse (12m). Completion March 2008.	Let to Eddie Stobart on a 15 year lease £4.50 plus 40p fit out rent. Sold to Scottish Widows at 7.75%. Profit share deal. Base price to Gladman £43.59 psf.	NEW
Royal London	Barton Dock Rd, Trafford Park	Trafford	183,000	Second Hand. 6.5m eaves. Poor condition.	F/H. Regatta - £2.6 Million	Second Hand
Revelan UK Ltd	Junction Lane, Sankey Valley Ind Estate, Newton-Le Willows	Merseyside	116,472	Second Hand - 9.5m eaves	H&M Distribution - 10 years at £2.75. 12 Months rent free. Occupier was next door	Second Hand
Hilding Anders	Salmon Fields, Oldham	Greater Manchester	286,000	Second Hand (1991) ex manufacturing unit. 8 - 9m eaves. 15 docks.	James Halstead bought for £5.25 Mil	Second Hand
PPG	Calver 9	Warrington	94,750	c10m	Next Plc 15 Year lease & £3.85 per sq ft	Second Hand
Morley Estates	South Road, Ellesmere Port	Cheshire	100,000	Second Hand	10 Years to Global Environmental @ £2.75	Second Hand
Invista	Parkway Deeside Industrial Estate	Chester	171,000	Second Hand.	Excelsior Packaging Ltd	Second Hand
Ashtenne	Fallows Way Huyton	Merseyside	95,000	Second Hand	Liverpool Football Club	Second Hand
PRUPIM	Preston 31	Lancashire	160,868	5 acres expansion. 6.5m eaves. 9 Level doors	F/H. Unknown - Sub £3 Mill.	Second Hand
SEGRO	B9 Heywood Distribution	Lancashire	101,000	6m eaves	Let in Sept 09 to Fowler Welch for 1 year at £2.00 per sq ft.	Second Hand
Threadn	ChillOut	Merseyside	178,000	Second hand	Sold to 151 for £2.67 Million	Second

Location	St Helens	Merseyside	Value	Category	Description	Handover
Findel	Burnley Bridge Business Park	Lancashire	213,000	New Build	Freehold purchase of land and D&B	Design and Build
<b>TOTALS</b>						
Total New Building Take up		-	2,124,853			
Total Second hand Building Take-up		-	1,391,090			
Total Design and build take up		-	213,000			
<b>Total of All</b>		-	<b>3,728,943</b>			

2010

Deal by Deal Breakdown of Industrial Take-Up (Buildings of around 100,000 sq ft and over)

DEVELOPER	DEVELOPMENT	REGION	SIZE	SPECIFICATION	DETAILS	BUILDING AGE
ProLogis	Stafford	Newcastle under Lyme	230,000	12m eaves. 20 docks. 9,000 sq ft offices.	Let to GAP	NEW
New Age Properties	Manor Point, Runcorn	Merseyside	128,386	6.15 acres - 12m eaves. 7 docks; 4 drive in; inc 3,025 sq ft offices;	12m eaves. Let to Medline UK. 17 year lease with breaks at 3 and 5. Year 1 £4.75 / Yr 2 £5.00 Yrs 3-5 £5.25 psf	NEW
Patrick Properties/LNC	Galaxy, Knowsley Industrial Park, J4 M57	Merseyside	476,144	Spec (15m). Cross docked. Completed August 2006.	Sold to a private individual (Hargreaves - Matalan) at £32.50 per sq ft	NEW
Pochin/Northridge	Unit 75, Midpoint, Middlewich	South Cheshire	353,100	New high bay speculative warehouse unit (12m). Completed June 2007.	Lease to K&N. 6 years; 3 yr break ; c. £2.98 psf - rent yrs 1-3 which increases to £3.23 psf in yr 4. 1 month r/f. Special Condition - c. 100k sq ft may be used by tenant only for two fortnightly periods in each year; if exceeded there are provisions which require a top up rent of c £50k - £90k pa (depending on area used). Landlord cannot re-let without the tenants consent.	NEW
SAICA	Road Three Winsford	South Cheshire	356,119	1970's warehouse facility	Sold £3 Million £8.50 psf) to Car Transplant Ltd	Second Hand
SEGRO	The Hub, Heywood Distribution Park	Greater Manchester	500,000	10.7m in the main. Fully racked.	Sold to Fowler Welch Coolchain for £14 Million (£28 psf)	Second Hand
Cabot Carbon	Cabot Corporation Premises, Gate St, Dukinfield	Greater Manchester	147,500	Mix of manufacturing space. 13 acres.	Sterling Lloyd bought for £2.5 Million.	Second Hand
Prudential Assurance	Centrepoint 5, Trafford Park	Trafford/ Manchester	179,174	55,000 sq ft at 20m eaves the rest at 6.5m eaves.	Let to UK Data Capture on 30 month lease.	Second Hand
Private Investor (Ron Wood)	Dummers Point, Bury	Greater Manchester	183,824	1990's warehouse with high office content (24,000 sq ft) (9m).	Let to Sambro International at £3.00 per sq ft. Deal netted back to c. £1.97 psf	Second Hand
Invesco PIT Ltd	Olivers Place, Preston	Lancashire	150,752	1980s, 6m eaves. No docks	Sold to Continental Group Ltd for £2.14 Million	Second Hand

Dams International	Dunnings Bridge Road, Aintree, Liverpool	Merseyside	106,224		5m to 8.8m eaves – letting to News Warehousing	Second Hand
Handleman	27 Leacroft Road Warrington	Warrington	116,695	Refurbished. 8-9m Dock loading.	LET Sept 2010 to Asics 5 yrs; 3 break - penalty c. 3-6 months - 3 month r/f; £3.40 psf headline - stepped 1-3 £2.00/2.50/3.00 psf - no works - Hillgrove Developments (LL) - LSH/KS acted for LL	Second Hand
Wolseley Plc	Unit R1 Revolution Park, Chorley.	Lancashire	361,634	Built in 2006. 14 m eaves. Fully fitted inc racking. 24,821 sq ft 8m concrete mezzanine	Bought by Kimberly Clark. Sale and leaseback to F&C Reit. Bought by F&C for £24.6 million at a 9.15% net initial yield. 11 year lease subject to a rent free period of 12 months with fixed 2% annual uplifts.	Second Hand
Beva	Walker Park, Blackburn	Lancashire	192,000	1970's building. Refurbished (8to12m). To be sub-divided	Let to Pretek Precision Homes on a ten-year lease.	Second Hand
Prudential	Dallam Lane, Warrington	Warrington	375,000	DHL warehouse. 9m and 14 m eaves. In two buildings	5 Year Lease / 3 Year break to Asda. £2.95 psf / 6 Months rent free. LL also carried out works.	Second Hand
Ainscough Strategic Land	1 Junction Business Park, Swinton	Trafford/Manchester	115,956		Roydon Group Plc signed a 10 year lease @ £234,000 per annum.	Second Hand
Ventnor Group	Unit 69 Stakehill Ind Est Middleton	Greater Manchester	102,855	10m eaves - cross docked	6 month let to Royal Mail	Second Hand
Prologis	Stoke	Newcastle under Lyme	200,000	New	Letting to Dunelm	Design and Build
Wilson Bowden	Kingsway Rochdale	Greater Manchester	616,000	New	JD bought the freehold. Canada Life bought the investment. 25 year lease at £4.75 psf	Design and Build
Home Bargains	Axis Business Park, Liverpool	Merseyside	350,000	New build extension of existing warehouse	Land owned by Home Bargains freehold. Warehouse extended.	Design and Build
Stobarts	Mersey Multi-Modal, Gateway, Widnes	Merseyside	528,000	8-10m eaves – new build and part chilled	Tesco signed a 35 year lease	Design and Build

	<b>Total</b>	
Total New Building Take up	-	1,187,630
Total Second hand Building Take-up	-	2,668,922
Total Design and build take up	-	1,344,000
<b>Total of All</b>		<b>5,550,552</b>

## 2011

### Deal by Deal Breakdown of Industrial Take-up (Buildings or around 100,000 sq ft and over)

DEVELOPER	DEVELOPMENT	REGION	SIZE	SPECIFICATION	DETAILS	BUILDING AGE
CB Richard Ellis Investors / Helios Slough.	R4, The Revolution, Buckshaw Village, Chorley	Lancashire	232,102	New speculative build. Completion August 2007. 20 Dock Level Lading Doors. 12m Eaves Height. 50k/N sq m floor loading. 101 car spaces. 26 Lorry Parking spaces. 2 Surface Level Loading doors.	Feb 2011 - Sold to Conair @ £37 psf. Landlord: King Sturge & Littler. Tenant : CBRE <b>VERY CONFIDENTIAL</b>	NEW
Gazeley	Gpark, Liverpool	Merseyside	360,000	New spec - 12m eaves	DHL - 10 yrs; £4.00 psf. 24 Months RF. Included 1 acre extra. Landlord: CBRE & Colliers. DHL acted for themselves. <b>VERY CONFIDENTIAL</b>	NEW
CB Richard Ellis Investors / Helios Slough	R2, The Revolution, Chorley	Lancashire	198,610	New speculative build. Completion August 2007. 12m eaves.	Golden Acre Foods 17 yr lease - £4.75 psf - option to purchase within 1st 2 yrs @ £45 psf - rent free standard - King Sturge/Littler & Co/Moriarty acted LL & BDH acted for T.	NEW
Royal London Asset Management	Pioneer Point, Pioneer Business Park. Ellesmere Port	Cheshire	393,240	(18m). Completed December 2005. 52 Dock Level Loading Doors; 18m eaves; 21,000 sq ft offices 18m Eaves Height 8 Surface Level Loading Doors 55m Yard Area	Let to Regatta Aug 2011 - 15 yrs; £2.75 psf; 2 yrs rent free - initial quoting £3.95 psf - <b>VERY CONFIDENTIAL</b>	NEW
Morley	Unit 1 Warrington South	Warrington	105,000	Hermes - 5 yrs; 2 break; £3.25 psf	New operation in North West. Modern build.	Second Hand
Cant Pak	Unit 1 Premier Point Runcorn	Merseyside	105,000	Sold to Downton Distribution £33 psf inc extra yard (2 acres)		Second Hand
Highcross	Big Rack, Deacon Park Knowsley. Merseyside. L33 7RX		130,000	Let to Allen Logistics - 5 yrs lease; £1.50 psf; stepped rent £1-£1.50.	Former manufacturing space. Low eaves/poor quality.	Second Hand
Church Commissions	Unit 66 Stakehill		92,096	The warehouse comprises of steel frame construction	10 year lease to NFT - rent from £4.00psf - £4.50psf equivalent to	Second Hand

				with 39 docks and 64 trailer spaces -- eaves 5.5m	24months r/f	
F&C Reit	Unit 1 Blackrod Interchange Bolton	Greater Manchester	148,200	Short Term 6 month let.	Georgia Pacific were unrepresented. CBRE acted for Landlord	Second Hand
Highcross	Crewe 213	Cheshire	213,291	6m eaves	Let to Warehouse One - 5 yrs; stepped rent from £1.75 psf to £3.25psf - avg £2.25 psf - 10 yrs; 5 break; LL rec deposit plus legal charge over racking	Second Hand
Exide	Former CMP Batteries Exide site on Salford Road Over Hulton, Bolton	Greater Manchester	258,244	Internally the unit has been split . The unit is lit via sodium lighting, is sprinklered throughout and contains a gantry crane. Eaves from 6.3-6.6m in the main body of the building.	Greater Manchester Waste Authority. Sold £4m	Second Hand
Co-operative Estates	Talke 230, Jamage Industrial Estate. Stoke-on-Trent	231,422	Fully Racked and Sprinklered. 22 dock level loading doors. 2 ground level loading doors. Eaves height of 10.3m. 3 separate service yards.	Savills acted for the LL.		Second Hand
Waitrose	Revolution, Chorley	440,000	D&B on 25 acre site. C. £225 per acre.	Pre-let to Waitrose at £4.40psf + £0.25psf fit out. Colliers acted for Waitrose. Funding from BA Pension Fund		Design and Build
Great Bear	land on Thermal Road in Bromborough	170,000	D&B	Deal between St James' Place and NWDA. pre-let to logistics firm Great Bear Distribution for a period of ten years for an undisclosed sum with a fixed rental uplift in the fifth year. Due to complete in December 2011.		Design and Build

<b>Total</b>	
Total New Building Take up	- 1,183,952
Total Second hand Building Take-up	- 1,283,253
Total Design and build take up	- 610,000
<b>Total of All</b>	<b>- 3,077,205</b>

## 5 Appendix 2

### North West Development Sites 5 acres plus and suitable for large Industrial/distribution development

Greater Manchester  
Lancashire  
Merseyside  
Cheshire

<b>Merseyside</b>						
<b>ADDRESS</b>	<b>OWNERSHIP</b>	<b>SIZE (acres)</b>	<b>SQ FT</b>	<b>PLANNING</b>	<b>COMMENTS</b>	<b>IMMEDIATELY DELIVERABLE</b>
Atlantic Park, Aintree	Royal London	15	100,000	Outline Consent	Being promoted for design and build	Yes
Stonebridge Business Park, Liverpool	St Modwen	5	100,000	Outline Consent	On site with Phase 1	Yes
G Park Liverpool	Gazeley	25	500,000	Outline Consent	Plans for 2 Units. 488,000 sq ft 257,000 sq ft. Minimum £4.50 psf.	Yes
Port of Liverpool	Peel	10	200,000	Outline consent	Available for port related occupiers only	Yes
Pirelli Prescot	Private develop	25	500,000	Brownfield site	Former manufacturing site of 50 acres. At present there is a planning application for change of use on the whole site for residential although half the site may be retained for commercial. 2nd phase of Speke Approach. Very poor ground conditions would make it difficult to be developed on that.	No
Ditton Junction, Widnes	Ainscough Land	25	375,000	Allocated for development		No
Gorse Lane Widnes	Halton MBC	20	400,000	Allocated for development	Former Bayer site	Yes
Halton Fields, Widnes	Pro Logis	50	1,000,000	Outline consent	Outline planning consent submitted for 1M sq ft with retail link. Believed to have large occupier pre-let for 1M sq ft.	Yes
3MG, Mersey Multimodal Gateway Widnes	Stobart	70	1,800,000	Outline consent	750,000 sq ft existing. Outline for 1.8 million sq ft increasing to 3.5 million sq ft. Rail linked.	No
The Hive, Liverpool International Business Park, Speke	CDP	25	500,000	Outline Consent	Immediately available. Site is adjacent to The Vault on Liverpool International Business Park. Minimum £4.50 psf. Can accommodate requirements between 100,000 to 350,000 sq ft.	Yes
Kilbuck Lane, Haydock	Fishwicks	10	170,000	Allocated for development	Outline consent for 140,000 sq ft	Yes
Elton Head Road adj. Co op Somerfield	Mixed Ownership	17.3	350,000	Allocated for dev.	Site available	Yes

Pilkingtons, St Helens	Pilkingtons	34.1	250,000	Brownfield Site	Site now being promoted for development – commercial element as part of a mixed use site. Only 12.35 acres assessed as immediately available	Part only
<b>TOTAL</b>		<b>331.4</b>	<b>6,245,000</b>			

Merseyside has 190 acres of immediately deliverable land to accommodate large scale industrial development. In St Helens there are only 3 suitable sites 1 of which has issues with deliverability.

## North West Development Sites – 5 Acres Plus and Suitable For Large Industrial/Distribution Development

<b>CHESHIRE</b>						
<b>ADDRESS</b>	<b>OWNERSHIP</b>	<b>SIZE (acres)</b>	<b>POTENTIAL SQ FT</b>	<b>PLANNING</b>	<b>COMMENTS</b>	<b>IMMEDIATELY DELIVERABLE</b>
Birchwood Warrington	MEPC	10	200,000	Outline consent	Part of Birchwood Park	Yes
Calver Road Warrington	Greater Manchester Pension Fund	5	250,000	Outline consent	Single building of 100,000 sq ft could be accommodated	Yes
Forest Way, Warrington	UU	15	300,000	Allocated for development	JV agreement	No
Omega North, Warrington	English Partnerships/Miller Developments	75	1,598,000	Outline consent	Outline consent granted in 2007. Initial enabling works underway. Infrastructure due to be built with 1st phase of development. Planning permission for 1.6m sq ft.	Yes
Port Bridgewater Ellesmere Port	Peel	55	1,000,000	Brownfield Site	Portcentric Facility (rail, Sea & Road) site being promoted for D&B	Yes
Basford West, Crewe	Prologis	75	1,500,000	Allocated for development	Up to 400,000 sq ft can be developed without the need for the extension of the link Road	Yes 20acres/400,000 sq ft
Crewe Commercial Park	Goodman	50	1,000,000	Outline consent	Units of 50,000 - 750,000 sq ft B8 distribution / Warehousing possible.	Yes
Midpoint 18, Middlewich	Pochin	50	1,500,000	Allocated for development	Phase 3 will be opened up by the Middlewich by-pass. Pochins and Cheshire County Council are in discussion over funding	No
New Cheshire Business Park Northwich	Chantry Developments	10	150,000	Outline consent	A unit up to 150,000 sq ft can be developed. Existing offices and small warehouses can be demolished. Would sell land at £250K per acre.	Yes
ICI Land, Northwich	ICI	100	2,000,000	Outline consent	Large infrastructure investment required.	No
	<b>Total</b>	<b>445</b>	<b>9,498,000</b>			

Of the 445 acres of suitable sites in the Cheshire area 225 acres are judged to be deliverable immediately although the Crewe sites mainly cater for the South Cheshire area which would not really service the core North West region.

<b>LANCASHIRE</b>						
<b>ADDRESS</b>	<b>OWNERSHIP</b>	<b>SIZE (acres)</b>	<b>SQ FT</b>	<b>PLANNING</b>	<b>COMMENTS</b>	<b>IMMEDIATELY DELIVERABLE</b>
G Park Skelmersdale	Gazeley	25 acres	500,000	Outline consent	Site being marketed for occupiers for design and build.	Yes
Yes	Peel Land & Property	50	750,000	Allocated for development	Peel Business Park site.	Yes
South Lancs Industrial Estate Wigan	Patrick Properties	100	2,000,000	Allocated for development	Outline planning application submitted and in consultation. It is not expected that the site will get planning.	No
Leigh Commerce Park Leigh	Property Alliance	10	100,000	Allocated for development	Ground issues need addressing	No
Blackburn Interchange, J4 M66	TBC	8	160,000	Outline consent	£358k/acre. Industrial D&B. B1/B2/8 use.	Yes
Haslingden Road Blackburn	UU / Conlon	11	220,000	Outline consent	JV agreement as of Apr 2011	No
Revolution Park Chorley	BAE	25	500,000	Allocated for development	Apparently u/o to Evander at c. £220k/acre	Yes
Wyre Street Padiham	Baxi	21	350,000	Allocated for development	Former factory complex – site needs clearing.	No
Burnley Bridge Business Park. Junction 9 on M65	Findel	30	450,000	Outline consent	Can provide 650,000 sq ft of industrial/distribution.	No
<b>TOTAL</b>		<b>280.50</b>	<b>5,280,000</b>			

Of the 280 acres of land identified in the Lancashire 108 acres are judged to be immediately deliverable.

<b>Greater Manchester</b>					
<b>ADDRESS</b>	<b>OWNERSHIP</b>	<b>SIZE (acres)</b>	<b>SQ FT</b>	<b>PLANNING</b>	<b>COMMENTS</b>
Kingsway, Rochdale	Wilson Bowden	50	1,000,000	Outline consent	Mixed use scheme. Main infrastructure completed and phase 1 units built. Largest plot 20 acres without moving estate roads and cut/fill. JD recently acquired 616,000 sq ft. Asda acquired 44 acres Aug 2011
Plot 3000, Ashton Moss, Ashton, Manchester	AMEC	25	400,000	Outline consent	Final phase of development. Needs remediation, peat removal. Unlikely to be available before 2015
North Manchester, Blackley Business Park	New Age Properties	13	250,000	Outline consent	Up to 250,000 sq ft.
Barton Moss/Port Salford, Salford	Peel	200	1,500,000	Allocated for development	Outline planning submitted. Intermodal distribution park with rail and port facilities on the Ship Canal
Mosley Road, Trafford Park	St Modwen	10	200,000	Outline consent	Planning submitted for 162,000 sq ft. Office/B1/B8.
Heywood Distribution Park, Heywood Rochdale	SEGRO	20	450,000	Outline consent	Part of the main distribution park. Outline Planning Consent for B8. Under offer to Brake Bros.
Former Altai Site, Trafford Park	Segro	10	200,000	Outline consent	To be sold in 2011
Electric Park, Trafford Park	Segro	6	110,000	Detailed planning consent	Available at £375,000 per acre
Pottery Lane, Manchester	MCC	5	90,000	Allocated for development	Not currently on the market
Agecroft Business Park Salford	NWDA	10	170,000	Detailed planning consent	Final Phase of scheme
Nr Oakhill Trading Estate Walkden	NWDA	12	240,000	Allocated for development	Developer tied site
Arla Foods Site	City Council	10	200,000	Allocated for development.	Old existing buildings on approx 50% of the site
Gate Street, Dukinfield	Cobalt	13	260,000		102,000 sq ft existing - mixture of buildings
Greengate, Chadderton	RLAM	12	240,000	Outline Consent	
Higginshaw Lane, Oldham	Marshall CPD	11.5	230,000	Outline consent	Largest single unit. 150,000 sq ft.
Weir Pumps, Newton Heath	MCC	20	400,000	Brownfield site	Industrial redevelopment site
Gibfield Park, Atherton	Canmoor	15	300,000	Outline Consent	Units up to 300,000 sq ft
Access 6SixtyOne	Goodman/DTZ	30	500,000	Allocated for development	Freehold/Leasehold
<b>TOTAL</b>		<b>452.50</b>	<b>6,440,000</b>		

The Greater Manchester area by virtue of its size has the largest amount of available sites in the region but again this availability would cater for requirements in a different geographical market. That said, it should be noted that almost half of the available land is at Port Salford which caters specifically for Port related occupiers. Given this, there is probably an argument that Greater Manchester requires more development sites to be released and certainly couldn't help cater for shortages of employment land in other areas of the North West.

## 6 APPENDIX 3

### AVAILABLE EMPLOYMENT LAND: SUGGESTED USES, ASSESSMENT OF DELIVERABILITY AND TIMESCALES

Site reference (includes referencing used in the Economic Land Position Statement)		Timescale for redevelopment	Area of developable land in Ha	Suggested Use						Comments
				B1 (a)	B1 (c)	B2	B8	Retail (A1)	Resid	
A1 – Lords Fold Industrial Estate		6-10 years	0.7		√	√	√			Not a site that would be particularly attractive to developers or occupiers. <b>Count as small/medium scale B2/B8 supply.</b>
B4 – Hazel Business Park	3Ec2 – Land south west of Sandwash Close	0-5 years	6.17		√	√	√			Site is suitable for redevelopment immediately for smaller sized units but would require large infrastructure work for a larger size scale development. <b>Count as small/medium scale B2/B8 supply.</b>
C4 – Washway Lane	4.1 – Land South of Washway Road 7.5 – Pilkingtons City Road Site 7.8 – Land at Cowley Hill	0-10 years	13.82		√	√	√			Part of site now being marketed for redevelopment by Pilkingtons. Potential for large scale industrial development if access to the A580 is improved but more likely to be a small to medium sized development. <b>Count 8.82 ha as small/medium scale B2/B8 supply and 5 ha as large scale B8 supply.</b>
D2 – Gerards Bridge	6.9 Gerards Bridge	0-5 years	2.1	√	√	√	√			Small unit scheme due to commence shortly by Northern trust. <b>Count as small/medium scale B2/B8 supply.</b>
Site E5 – Pocket Nook	(Site EM01 Eastside Masterplan Pocket Nook/Holly Bank Street)	0-5 years	0.0		√	√	√			Site is currently being developed out by Biffa for a new waste transfer facility. <b>No development land remains.</b>
F1 – Atlas Street	EM03 – Eastside Masterplan St Helens Glass	0-5 years	3.3		√	√	√			Site suitable for immediate small to medium scale B2/B8 industrial development. <b>Count as small/medium scale B2/B8 supply.</b>
G1 – Parr Street	EM06 – Eastside Masterplan	0-5 years	1.49	√				√		Site suitable for smaller sized scale B2/B8 industrial development but probably has potential for higher value uses. <b>Count as small/medium scale B2/B8 supply.</b>

	Parr/Church Street										
M2 – Redundant factory at Ravenhead Rd	5.1 – Ravenhead Glass site	6 – 10 years	7.38		√	√	√				Site suitable for redevelopment but not strong enough for large scale B8 distribution. Could suit larger scale B2 waste facility or small to medium scale B2 and B8. Warehouse on part of site has been retained for an indoor football (D1 Leisure) use. <b>Count as small/medium scale B2/B8 supply.</b>
Q8 – Vacant Site at Peasley Cross	6Ec5 – Land west of Lancots Lane (N of Hays) 6.4 – Hays Chemicals 6Ec6 – Land east of Baxters Lane ( S of Hays Chemicals)	0-5 years	5.44		√	√	√				Site could be developed immediately for mixed B2/B8 small scale development. <b>Count as small/medium scale B2/B8 supply.</b>
R5 – Vacant Land at Bedford Street	6Ec 1 – Land north of Bedford Street	0-5 years	0.64		√	√	√				Suitable for small scale industrial development. <b>Count as small/medium scale B2/B8 supply.</b>
R12 – Site located adjacent to Edward Street		11- 15 years	0.0			√	√				Unlikely to come forward as a viable development site. <b>Exclude from supply.</b>
W3 – Units on Haydock Lane		0 -5 years	0.71		√	√	√				Most of site occupied. Could be redeveloped if fully vacated and fell under single ownership. Part could be developed now for small scale development. <b>Count as small/medium scale B2/B8 supply.</b>
W9 – Site on Haydock Cross	2Ec9 – Land north of Kilbuck Lane	0 –5 years	3.46		√	√	√				Site suitable for immediate small or medium sized B2/B8 development or a larger scale B8 unit. <b>Count as large scale B8 supply.</b>
W11 – Boston Park	2Ec12 – Old Boston	0-5 years	0.00		√	√	√				Site currently under development. Medium sized sector. <b>Exclude from supply.</b>
W13 – Empress	7.7 – Land adj. to	0-5 years	1.6	√							Suitable for B1 offices or B2/B8 medium sized sector development. <b>Count as supply for B1a offices.</b>

Office Park, Haydock	Empress Works										
W21 – Land on Millfield Lane	2Ec4 – Land E of Millfield Lane	0-5 years	0.77		√	√	√				Site suitable for immediate B2/B8 small to medium sized sector development. <b>Count as small/medium scale B2/B8 supply.</b>
AA1– Sankey Valley Industrial Estate	7.6 – Former Sankey Sugar works	6 – 10 years	12.9			√					Development land at this site includes the former Sankey sugar works (4.69 ha) and approximately 7.5 ha of brownfield and Greenfield land occupied by Revelan Group which has made representations as to the suitability of the site for future employment redevelopment. The location of the site does not lend itself to large scale Bu uses. <b>Count as small/medium scale B2/B8 supply.</b>
FF3 – Abbotsfield Road Industrial Park	Site 6Ec15 Land at Abbotsfield Rd and 6Ec17 – Land at Abbotsfield Rd Ind Est (East of TAC)	0-5 years	1.0		√	√	√				Part of site suitable for immediate development. <b>Count as small/medium scale B2/B8 supply.</b>
FF5 – Open Site fronting Abbotsfield Road	6Ec14 – Land at Abbotsfield Road	6 – 10 years	0.00		√	√	√				Site in use. Residual land not viable for development within plan period. <b>Exclude from supply.</b>
GG2 – Site at Elton Head Road	5Ec1(a) – Land at Lea Green Farm East	0-5 years	6.99		√	√	√				Site available for B2/B8 development although given good motorway location should elicit B8 interest. <b>Count as large scale B8 supply.</b>
II1 – Mere Grange Business Park	5Ec1(b) – Land at Lea Green Farm West	0-15 years	9.55	√							Site identified as expansion of Mere Grange Office park. Will be developed as B2 offices. <b>Count as supply for B1a offices</b>
JJ6 – Site off Chapel Lane opposite	5Ec3 – Land east of Linkway (E of Remploi)	11 - 15 years	0.00		√	√	√				Access is very poor so unlikely to be developed. <b>Exclude from supply.</b>

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Micklehead Farm											
KK2 – land to the rear of Oak Tyres	5Ec9 – Stoney Lane Ind Est Rainhill	0 - 5 years	0.00	√	√						Not likely to be attractive to developers and occupiers for B2/B8 development. <b>Exclude from supply</b>
MM1 – former Ibstock Brick site	-	6 -10 years	8.1		√	√	√				Site suitable for re-use B2/B8 small to medium sized sector development. <b>Count as small/medium scale B2/B8 supply.</b>
<b>TOTAL</b>			<b>86.12</b>								

## **7 APPENDIX 4**

EMPLOYMENT SITES IN USE IN ST HELENS OFFERING  
POTENTIAL FOR PART B8 REDEVELOPMENT DURING  
PLANNED PERIOD AS IDENTIFIED IN  
“ST HELENS EMPLOYMENT LAND & PREMISES STUDY MAY  
2011

Table 6.3 Employment sites in use offering potential for part B8 redevelopment during plan period

Site	Area	Current Use	Comments	Estimated Timing for Redevelopment
D1 – Gerrards Bridge junction/Haresfinch	0.96	B2/B8 timber yard	Has level and access issues which may preclude commercial development.	6-10 years
E1 - Lock Street (off Merton Street)	6.42	B8 (occupied by SCA)	B8 access not ideal but building likely to be retained for existing use going forward.	11-15 years
H5 - units on Eastside opp. Jackson Street	1.42	B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period. Small to medium size scale development.	0-5 years
P2 - Sherdley Road	c. 1.5 (exc. Polar Ford Garage)	B2/B81	Potentially suitable for mixed use employment (inc. B8) development over plan period. Prime site for small to medium sized development for B2 and B8.	0-5 years
Q5 - Units on Robbins Lane/Lancoats Lane	3.25	B1(a)/B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period	11 -15 years
Q9 – Baxters Lane Industrial Estate	2.12	B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period. Small scale unit size development if site ever became vacant.	6-10 years
R3 – Gaskell Road	0.84	B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period. Small scale unit size development.	0-5 years
R4 – Parr Industrial Estate	4.42	B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period. Small to medium sized sector redevelopment if site ever became vacant.	6-10 years
R7 - Parr Industrial Estate	1.07	B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period. Any development would in small to medium size sector if site became vacant.	6-10 years
R10 - Parr Industrial Estate	1.21	B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period. Any development would in small to medium size sector if site became vacant.	6-10 years
W15 – Haydock Industrial Estate (Manheims Car Auctions/Royal Mail)	3.51	B2/B8	Currently Used for open storage mainly. If sites are ever vacated and can be assembled into a single ownership then it could be suitable for a large scale industrial/distribution building.	0-5 years
W16 – Haydock Industrial Estate – Fishwicks Complex	2.44	B1(a)/B2/B8	70% vacant. Site could be incorporated with larger site behind for a larger industrial/distribution facility.	6-10 years
JJ4 – units on Walkers Lane (Hattons Travel and Kverneland)	2.85	B2/B8	Potentially suitable for mixed use employment (inc. B8) development over plan period if ever vacated and in single ownership. Site could accommodate a large scale building but there would be concerns over deliverability on ground conditions and if location and access would be strong enough to attract occupiers.	11-15 years
<b>TOTAL</b>	<b>32.01 ha</b>			