



GL Hearn

Part of Capita Real Estate

Liverpool City Region Assessment of the Supply of Large-Scale B8 Sites

Final Report

June 2018

Prepared by

GL Hearn
280 High Holborn
London WC1V 7EE

T +44 (0)20 7851 4900
glhearn.com

Advised by B8 Real Estate
6800 Daresbury Park
Warrington WA4 4GE

Introduction

- 1.1 GL Hearn, working with Justin Gardner Consulting, Oxford Economics, and MDS Transmodal, produced the Liverpool City Region Strategic Housing and Economic Land Market Assessment (SHELMA), with the final version published in 2018. The SHELMA provided an objectively assessed need for housing and for office (B1a and B1b use classes), industrial (B1c and B2), and small-scale warehouse/distribution (B8) needs across the City Region and for each local authority. This is to inform – but not to prescribe – the content of their local plans.
- 1.2 Large-scale B8 uses were considered separately. A ‘large scale’ warehouse is defined as an individual unit over 9,000 square metres or approximately 100,000 square feet, this being the standard recognised definition within the commercial property sector.
- 1.3 The approach to forecasting future warehouse new-build takes into account the fact that demand for new-build warehousing is a combination of two factors, namely:
 - The requirement to continually replace existing warehouse capacity which is 'life expired' (replacement build); and
 - The need for additional floor space to handle long-term growth in freight volumes (Growth Build).
- 1.4 For the Growth Build calculation, two sets of traffic forecasts were produced for the strategy, namely:
 - *Do-minimum* – reflecting recent underlying economic growth alongside minimal investment in transport infrastructure (nothing beyond that already committed) and no other public sector interventions; and
 - *Do-something/ Transport for the North Strategy* – reflecting the consultant’s strategy, which also reflects the results of an extensive consultation exercise with the freight and logistics industry in the north of England and the public sector. This included substantial transport infrastructure investment (e.g. up-front provision of rail freight capacity), improved connectivity to ports and a substantial growth in rail/water connected distribution facilities across the north of England, alongside other public sector interventions, such as a more favourable planning environment.
- 1.5 Taking account of the typical replacement of existing warehouse stock in 30-35 years (replacement build) together with growth in demand arising from traffic growth through two scenarios- a ‘do minimum’ scenario which broadly follows past trends; and a scenario which aligns to the Transport for the North freight strategy which sees the North and the City Region capture a greater share of demand nationally, and takes into account the potential arising from the expansion of the Port of Liverpool and wider SuperPort proposals.

Table 1: Forecast Large Scale B8 Requirement to 2037

	Do Minimum 2037	TFN Strategy 2037
Replacement build (000s sq m)	952	952
Growth Build (000s sq m)	281	638
Land Required (ha)	308	397

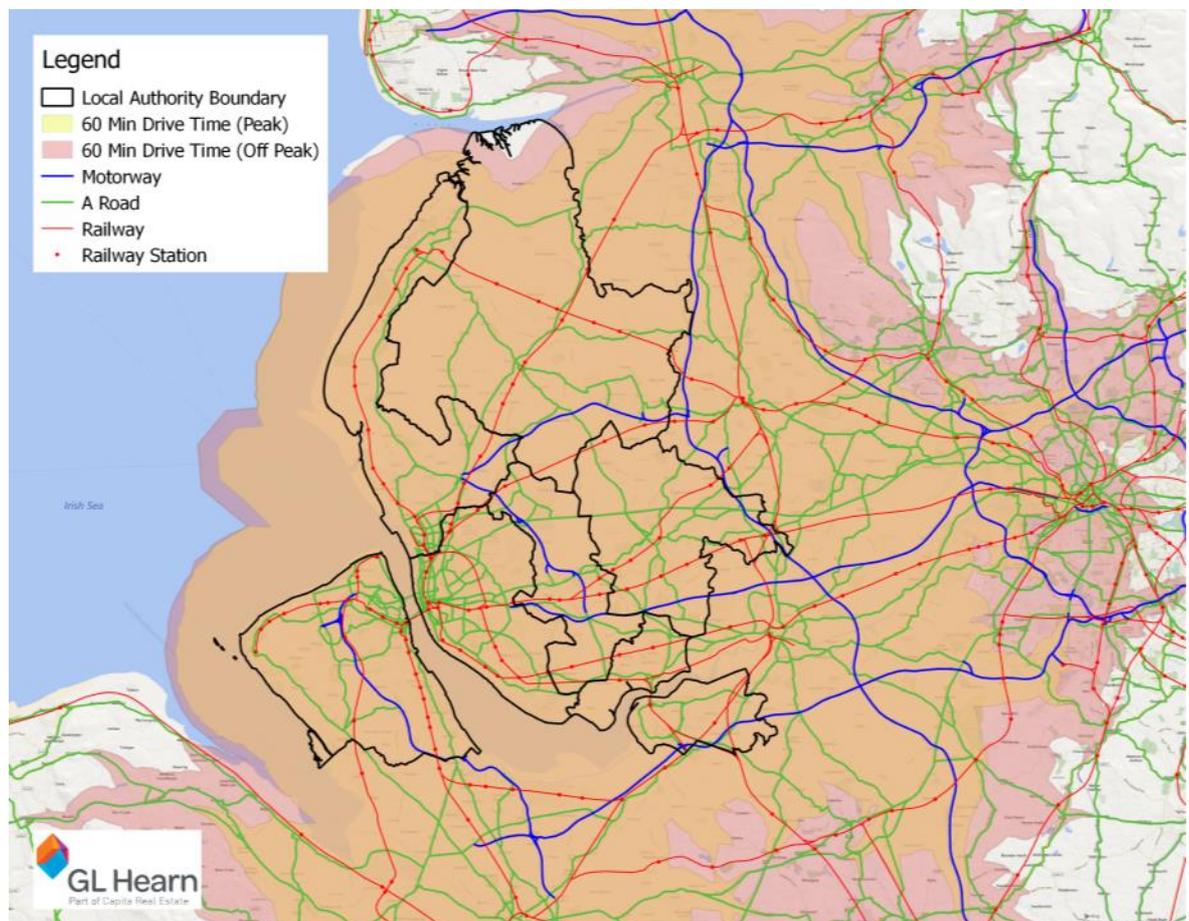
Source: Table 69, Liverpool City Region SHELMA (GL Hearn, 2018)

- 1.6 The SHELMA identifies the need for large-scale B8 uses across the City Region but does not disaggregate the demand for large-scale B8 to a local authority level. The market for large-scale warehouse/ distribution development is considered to be sub-regional in nature, and growth at a local level is typically supply-driven – it is influenced by the availability of land at attractive locations. Therefore, to a large extent, the distribution of growth is a supply-led issue.
- 1.7 For the purposes of this study, a ‘large scale’ warehouse is defined as an individual unit over 9,000 square metres or approximately 100,000 square feet, this being the standard recognised definition within the commercial property sector. This figure also aligns with the definition used in the SHELMA.
- 1.8 Colliers International’s study on global industrial and logistics trends¹ identifies three types of distribution centre (DC) which will take the dominant form in years to come:
- 1.9 Mega-sized regional/national DCs:
- At the trading port/entry level supersized centres which are either automated or semi-automated.
 - These schemes are increasingly intermodal.
 - Major road access is critical, as is state of the art automation and racking.
 - Sizes vary up to 90,000+ sq m / 1 million+ sq ft is not unusual for the bigger schemes.
- 1.10 Mid-size, cross-docked DCs:
- Serving major cities and conurbations.
 - Typically located around the main arterial routes into the urban areas.
 - Units are commonly around 93,000 sq m / 100,000 sq ft.
 - Typically 10m+ clearing height min, 50-150 min loading docks
- 1.11 Smaller urban warehouses:
- Support more flexible last mile functions.
 - Small facilities up to 930 sq m / 10,000 sq ft.
 - Located in urban areas with good access to customers.
 - Typically hand-picked operations.
 - Local couriers, bike and small vehicle.

¹ From First Mile to Last Mile, Colliers International, Winter 2015.

- 1.12 Colliers expect that while the mega-sized DCs will continue to show a pattern of consolidation, there will be a considerable growth in the number of mid-sized and smaller units, as urban logistics continues to grow in scale and importance.
- 1.13 This study is focussed on sites capable of supporting growth for the larger two types of DC. Demand for the smaller centres was considered separately as 'smaller scale' B8 in the SHELMA. Therefore the analysis will focus particularly on the aspects of size, and strategic access to the Port and to the strategic transportation networks. The mega-sized DCs will also be influenced by access to intermodal facilities providing access to the rail network as well as the strategic road network.
- 1.14 The map below shows the 60 minute drive-time from the Port of Liverpool. This area encompasses all of the Liverpool City Region's authorities. It also shows the region's motorway and major A-road networks. This highlights the City Region's good motorway coverage with the M57, M58, and M62 providing good links to the M6 and the wider North of England, while the M53 provides good links to the M56 and North Wales.

Figure 1: Port of Liverpool Drive Time Map



Assessing the Supply of Large-Scale B8 Sites

- 1.15 The supply assessment is the key factor in determining how the existing supply of larger sites will contribute to meeting the identified City Region-wide need for large-scale B8 development. This assessment should be undertaken on a consistent basis at a sub-regional level rather than at an individual local authority level.
- 1.16 As part of the SHELMA, GL Hearn undertook an audit of sites across the City Region to assess their suitability for large-scale B8 development. This assessment, undertaken in summer 2016, considered the suitability of sites to accommodate large-scale B8 development, including their market attractiveness and issues affecting the deliverability of B8 development. From a total of 64 sites considered, this audit concluded that the developable land supply for Strategic B8 development in the Liverpool City Region FEMA comprised 36 sites totalling 549 ha. 22 of the 36 developable sites (61%) were less than 10 ha in size while 10 sites (28%) were between 10 and 30 ha. In terms of very large sites, there are four sites over 30 ha in size, three in St Helens and one in Halton.
- 1.17 However, while a site may be suitable for B8 development, the majority of sites assessed were allocated or benefited from planning permission for a wider range of employment uses, and as such may come forward for uses other than B8. Indeed there have been a number of instances where suitable sites have come forward for alternative employment uses since the 2016 assessment.

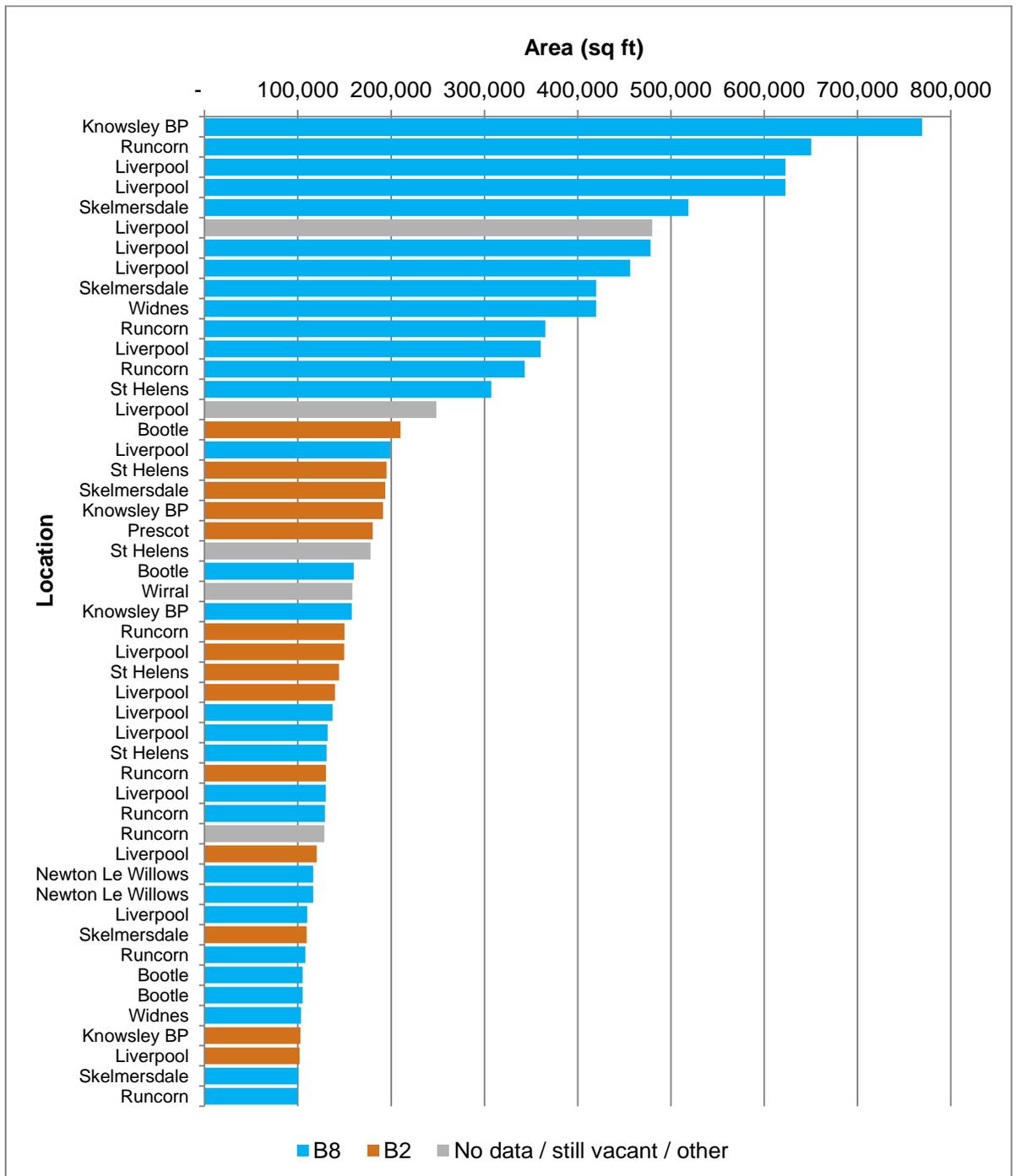
Purpose of the Study

- 1.18 The purpose of this study is therefore to update and build upon the findings of the 2016 large scale sites assessment in order to identify how much of the existing supply is realistically marketable and likely to come forward for large-scale B8 uses by 2037. This will confirm whether the current supply is sufficient to meet forecast needs identified in the SHELMA or if there is a shortfall which will need to be met through the identification of additional sites. The identification and assessment of potential additional strategic B8 sites is outside the scope of this study.
- 1.19 GL Hearn has undertaken this work in collaboration with B8 Real Estate who specialise in providing real estate advice to the Industrial and Distribution sector across the North of England and therefore have a detailed understating of the distribution market across the City Region as well as local knowledge of site specific issues.

2 PAST TRENDS IN THE TAKE-UP OF LARGE-SCALE PREMISES

2.1 The figure below shows the take-up of large-scale industrial premises across the City Region. The data includes all deals recorded where more than 100,000 sq ft of total floorspace was taken-up and includes both leases and sales. The data includes deals for new, renovated, and existing space.

Figure 2: Take-up of employment units 100,000+ sq ft, 2009-2017



Source: GL Hearn analysis of CoStar data

- 2.2 The data shows that 30 of the 49 deals² (61%) were taken for predominantly B8 uses; 14 (29%) were taken for predominantly B2 uses; and 5 (10%) were taken for other uses, or remain vacant, or there is no available data regarding their use.
- 2.3 However the data clearly shows that the larger space was taken almost exclusively for B8 uses. One third of the recorded deals were for more than 200,000 sq ft and 14 out of 16 (88%) of these were taken for B8 uses. The other two sites remain vacant and being advertised as development opportunities.
- 2.4 Of the two thirds of the deals for units between 100,000 sq ft and 200,000 sq ft, around half (17 out of 33, 52%) were taken for B8 uses while 13 out of 33 (39%) were taken for B2 uses.
- 2.5 The table below summarises the results, in terms of number of deals and total floorspace taken. When drawing conclusions on the delivery of new floorspace, it is reasonable to exclude sites which have been taken up as redevelopment opportunities, or remain vacant. In addition there are a number of sites taken for specialist uses such as for cold storage. Therefore the data excluding the 'Other / vacant / no data' figures provides a reasonable working assumption on the use class split for new premises. Excluding these results, across the City Region 80% of large unit floorspace has been taken for B8 uses while around 20% has been taken for B2 uses.

Table 2: Take-up of employment units 100,000+ sq ft, Summary Table

Use	Count	% of B8/B2 (excl. 'Other')	Total Floorspace (sq ft)	% of B8/B2 (excl. 'Other')
B8	30	68%	8,475,000	80%
B2	14	32%	2,118,000	20%
Other / vacant / no data	5	N/A	1,193,000	N/A
	49		11,786,000	

Source: GL Hearn analysis of CoStar data

- 2.6 Considering only the deals for new or renovated space shows 16 of the 49 deals were for new or renovated premises. This figure provides a more relevant assessment for the use split of new build space, however the data provides a relatively small sample from which to draw conclusions. Nevertheless, analysis of this data shows a similar split of new / renovated floorspace between B8 and B2 uses: 84% going for B8 uses, 16% for B2 uses.

² A list of deals since 2009 is included in Appendix A.

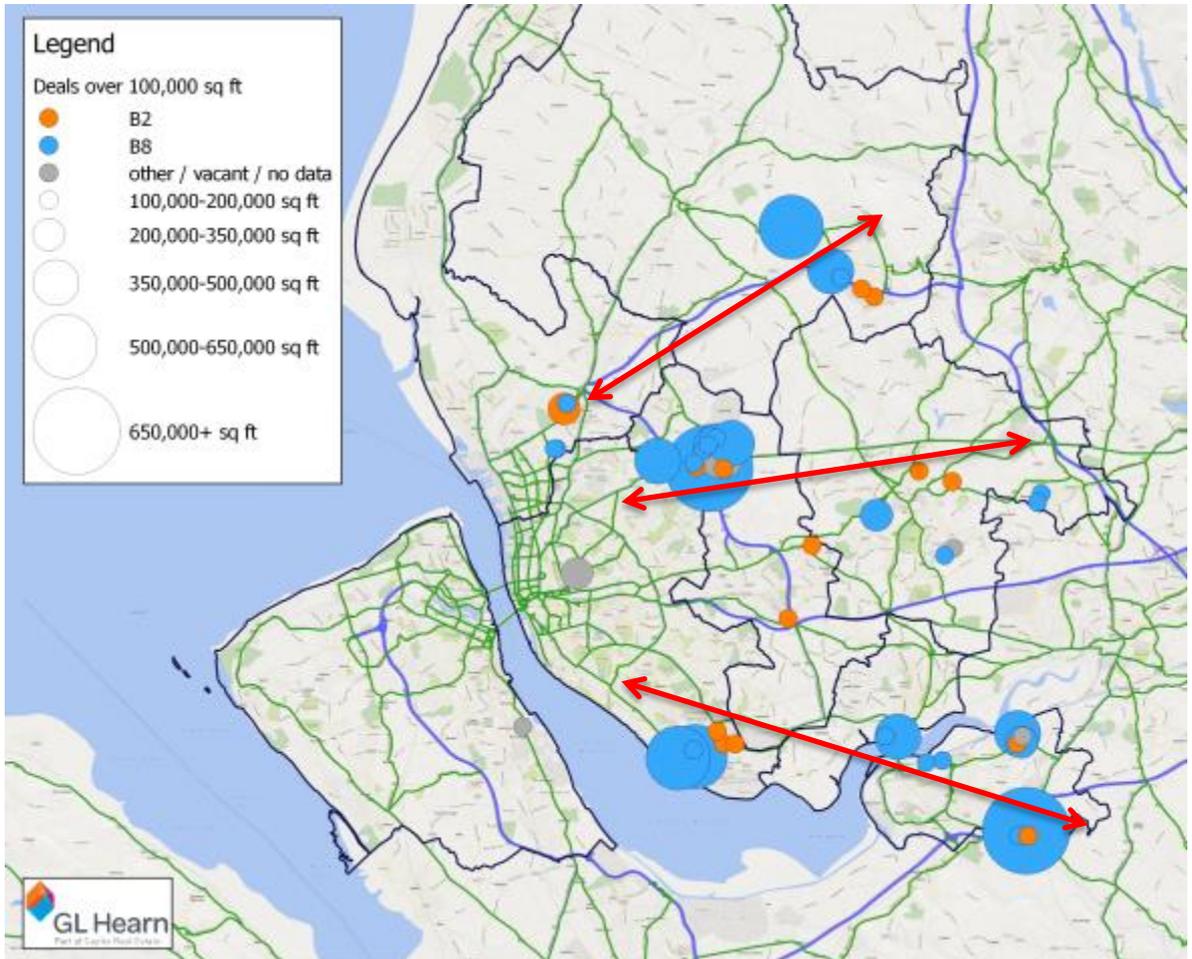
Table 3: Take-up of new or renovated employment units 100,000+ sq ft

Use	Total Floorspace (sq ft)	% of B8/B2 (excl. 'Other')
B8	3,522,000	84%
B2	672,000	16%
Other / vacant / no data	128,000	N/A
	4,323,000	

Source: GL Hearn analysis of CoStar data

- 2.7 Overall, the data suggests that across the City Region it is reasonable to assume that around 80% of floorspace will be taken for B8 uses while around 20% will be taken for B2 uses. This is commensurate with GL Hearn’s experience elsewhere and aligns with the experience of B8 Real Estate.
- 2.8 The data also provides analysis of the spatial dimension of take-up of large scale floorspace across the City Region. The figure below maps the data. The figure shows circles of different sizes according to the quantum of floorspace taken at each location.
- 2.9 The figure highlights the areas which have seen higher levels of activity for large scale units. This highlights the importance of the strategic road and motorway network with the majority of activity focused round key network nodes – particularly for the larger deals. The main exception to this is Liverpool International Business Park which benefits from its location close to the Liverpool conurbation and Liverpool Airport.
- 2.10 It is notable that the analysis shows a clear area of activity focussed across the centre of the City Region, focussed along the motorway and main A-road corridors linking Liverpool and the M6. This broadly covers the local authorities of Liverpool, Knowsley, Halton, and St Helens, as well as the southern parts of Sefton and West Lancashire.
- 2.11 Conversely, it is notable that there is virtually zero activity for larger units in the northern parts of Sefton and West Lancashire along with Wirral. The northern parts of Sefton and West Lancashire are relatively rural areas largely bypassed by the M6 corridor to the east, and with relatively poor A-Road coverage. Wirral is not optimally located for distribution uses due to its relatively poor connectivity to the rest of the City Region or to the M6. It benefits from good motorway provision, however connectivity to Liverpool and the rest of the City Region is restricted by tunnel access and there are more direct routes to the M6 and the rest of the north of England and the midlands.

Figure 3: Take-up of employment units 100,000+ sq ft, Spatial Distribution



Source: GL Hearn analysis of CoStar data

3 SITE ASSESSMENTS

3.1 This section provides assessments of current or potential sites within the FEMA which could suitably accommodate large-scale B8 warehouse/ distribution development (units of over 100,000 sq ft). The site assessments presented in this section consider the availability of land; the suitability of sites to accommodate large-scale B8 development, including their market attractiveness; and issues affecting the deliverability of B8 development, including infrastructure.

3.2 Consideration was given to site characteristics, including site size, available land/ plots, shape and topography; access to the strategic road network and rail network, labour force and public transport connectivity, as well as local access and internal circulation (for existing sites). Neighbouring activities were considered including local services, as well as uses which could limit the potential for 24 hour operation. Planning status, land ownership and infrastructure requirements were considered. Input in considering sites relative accessibility, as well as network capacity issues on the road and rail networks (including rail loading gauge capacity), was provided by Merseytravel, drawing on existing evidence including the TfN Freight and Logistics Strategy (2016) and Liverpool City Region Freight Study (2014).

Table 4: List of Assessment Sites

Local Authority	Site Name
Halton	3MG, Widnes
Halton	Widnes Waterfront
Halton	Port of Runcorn and Port of Weston
Halton	Astmoor Business Park, Central Redevelopment Area
Halton	Land at Ditton Road
Halton	Everite Road West
Knowsley	Land to the South of the M62
Knowsley	Knowsley Business Park
Knowsley	Beacon 62, Tarbock Road, Huyton
Liverpool	Land to the West of Junction of Long Lane and Stopgate Lane
Liverpool	A580 Stonebridge Cross
Liverpool	Estuary/ Liverpool International Business Park, Speke
Sefton	Land east of Maghull
Sefton	Atlantic Park, Dunnings Bridge Road Corridor
St Helens	Parkside West
St Helens	Parkside East
St Helens	Land north of Penny Lane, Haydock
St Helens	Florida Farm North, Haydock
West Lancashire	XL Business Park
Wirral	Wirral International Business Park
Wirral	Former Stone Manganese Site, Seacombe
Wirral	Eastham Dock Estate (Port Wirral)
Wirral	Wallasey Bridge Road, Birkenhead
Wirral	Bidston Dock, Birkenhead

Sites in Halton

3MG, Widnes

- 4.1 The Mersey Multimodal Gateway includes land at Ditton / Halebank, both to the north and south of the West Coast Main Rail Line. This is a flat, multi-modal site with access by both road and rail.

3MG East, Viking Park



- 4.2 South of the rail line is 3MG Viking Park. This site covers a total of 33 ha which can accommodate development in the short-term in this area. The site is currently being advertised by Stobart as a high quality distribution facility to continue the development of the area following the development of the 415,000 sq ft Tesco distribution centre to the east of the site.
- 4.3 The site benefits from planning permission for 1,416,150 sq ft of storage and distribution floorspace (Use Class B8) including ancillary offices and vehicle parking as well as a 13.7MWe biomass facility. The land area for B8 development (i.e. the site area excluding the biomass facility) is roughly 30 ha. The indicative masterplan shows that the floorspace will be delivered across approximately 4 units of 625,000 sq ft, 310,000 sq ft, 200,000 sq ft, and 100,000 sq ft.

- 4.4 The site benefits from strong accessibility to the strategic road network. It is located to the west of the A533 close to the Silver Jubilee Bridge and the junction with the A562 and A557, providing good access to the wider strategic road network both north and south of the River Mersey. Road access into the site is currently convoluted due to the construction work for the new Mersey Gateway Bridge which may have an impact on development of the site in the short-term. Longer-term, the delivery of a second crossing will reduce congestion and improve the site's market attractiveness.
- 4.5 There is a multi-modal terminal at the site, operated by Stobart Group. The site benefits from good rail access onto the West Coast Main Line as well as the Ditton to Warrington Line, although the short one mile section of line into the terminal has not been electrified so it can only be used by diesel locomotives. This puts it at a slight disadvantage compared to Garston Freightliner Terminal which is accessible to both electric and diesel locomotives. The terminal is served by 5-6 trains per day, providing direct links to Felixstowe and Southampton. It can handle high cube 9'6" containers. The site also provides the potential for rail-served buildings.
- 4.6 **Conclusion: Large site with the potential to provide 30 ha of large and very large distribution floorspace in a location benefiting from similar uses and excellent access to the strategic road and rail network. The site is considered an attractive location for both B2 and B8 development although it is being marketed for the latter.**

3MG West



- 4.7 The Eastern part of the site comprises a large 38.0 ha flat site on the western edge of Hale Bank, comprising previously developed land, bounded by the railway line to the north. This part of the site is located close to the extensive existing employment areas at 3MG and along Hale Road / Ditton Road, and the industrial estate on Newstead Road to the north of the railway line, however the area to the south and east is primarily residential in nature and residential properties bound the site on these sides.
- 4.8 Access to the site has been established from the north, across the railway line, from the junction of the A562 and A5300 through delivery of new infrastructure. This provides direct access to the strategic road network. The site also benefits from excellent access to the strategic rail network.
- 4.9 The site benefits from an extant planning permission by railway engineering company Alstom (approved May 2016) for the construction of a purpose built transport and technology facility (Use Class B2) in three phases. The three phases of development will cumulatively provide a total of 51,000 sq m of floorspace to be used by Alstom UK themselves. Alstom's investment will allow train maintenance/ refurbishment and could in the future allow rail manufacturing to take place, should Alstom win future contracts for new rolling stock.
- 4.10 The planning permission identifies a development area of 31.92 ha to be used for B2 uses (as outlined above), and identifies an area for future development of 6.085 ha at the eastern edge of the site. Alstom do not specify the use of the future development area although note that the adopted planning policy specifies B8 use. Any development would have to be conducive to the residential uses which bound the site to the east.
- 4.11 **Conclusion: The majority of the site has gone for B2 development, although there remains an area of future development totalling 6.085 ha. The location is considered commercially attractive for both largescale industrial and distribution uses.**

3MG North, Liberty Park



- 4.12 This 9.5 ha site is located to the south east of the existing industrial estate at Newstead Road on the edge of Ditton. The site is previously developed land which has been cleared and remediated and is currently vacant. The site is being advertised as Liberty Park Widnes for industrial/warehouse development.
- 4.13 It is bounded by the rail line to the south. The site is located close to the junction of the A562 and the A5300, with a new access constructed from this to serve the site. Strategic road access is thus strong. A rail connection to the West Coast Main Line and Ditton to Warrington Line could potentially be reinstated, with the site therefore providing potential to be rail-connected.
- 4.14 Outline planning permission was granted in January 2016 to redevelop the site for B2/B8 uses providing an extension to the existing industrial area to the west. The planning permission is to create three new warehouse units providing 196,500 sq ft, 174,250 sq ft, and 107,210 sq ft. All three units have ancillary office and HGV loading and parking bays.
- 4.15 **Conclusion: The site benefits from excellent access to the strategic road and rail network, and is being marketed to provide 3 large (100,000+ sq ft) B2/B8 units, for which outline planning has been consented. The location is considered commercially attractive for both largescale industrial and distribution uses.**

- 4.16 **3MG Conclusion: High quality sites at prime location within the City Region. The sites benefit from excellent access to the strategic road and rail networks. The Viking Park site comprises 30 ha which is marketed as, and has planning permission for, large scale B8 uses. The other two sites are smaller and would be attractive locations for large B2 or B8 units.**

Site	Area	Recommendation
Viking Park	30 ha	Large scale B8 uses.
Alstom Site	6.1 ha	Large scale B2 or B8 uses.
Liberty Park	9.5 ha	Large scale B2 or B8 uses.

Widnes Waterfront

- 4.17 Widnes Waterfront is an existing employment area to the east of Widnes Town Centre, between Widnes Town Centre and the River. This area contains a mix of B-class employment uses, with a focus on B2 uses.
- 4.18 The site is accessed from the A562 Fiddlers Ferry Road which links to the A557 and the Silver Jubilee Bridge. Access across the Mersey will be improved through the delivery of the Mersey Gateway Bridge. The site does not have rail access.
- 4.19 This is an established industrial estate, with existing infrastructure in place. Development sites are previously-developed and may require remediation. Internal site access and circulation is adequate. The site is divided from residential areas by the A562, and could support 24 hour operation. Its location within Widnes supports labour force access; and benefits from good access to public transport.
- 4.20 The Halton Core Strategy defines this area as within South Widnes Key Area of Change, with an emphasis within the Widnes Waterfront area on mixed employment uses. The Widnes Waterfront Phase 2 Masterplan specifically supports B2/B8 development.

G-Park



- 4.21 A flat, 17.9 ha site within the established Moss Bank Industrial Area in Widnes accessed from the A562 Fiddlers Ferry Road which links to the A557 and the Silver Jubilee Bridge. The site comprises previously developed land (formerly Bayer) which is currently vacant. The site is currently being by redeveloped by Marshall CDP and Halton Borough Council and site remediation work is currently underway. The site is being marketed as a bespoke design and build opportunity for both B2 and B8 uses, with units from 50,000 – 600,000 sq ft.
- 4.22 The estate environment is generally well landscaped, providing an attractive environment, and the estate roads are in good condition. Neighbouring uses include sites of open storage and a concrete works.
- 4.23 The site benefits from excellent road and rail links and the location is attractive to both industrial and distribution occupiers. We would expect the site of this size would most likely come forward to deliver a range of large (100,000+ sq ft) units under use classes B2 or B8.
- 4.24 **Conclusion: The 17.9 ha previously-developed site is within an existing industrial area and benefits from excellent access to the strategic road network. The site is being marketed for both B2 and B8 uses and is capable of supporting some very large scale. It is capable of development in the short-term.**

Johnsons Lane



- 4.25 This is a flat 8.7 ha site comprising previously developed land. The site is accessed from the A562 Fiddlers Ferry Road. The estate environment is generally well landscaped, providing an attractive environment, and the estate roads are in good condition. To the east of the site is Fiddlers Ferry Power Station.
- 4.26 Planning permission was granted for the development of the north eastern part of the site (3.1 ha) for the construction of an Incinerator Bottom Ash recycling facility. The rest of the site is vacant and is partially used for the storage of trailers and skips.
- 4.27 The site to the south (beyond the red line above) has extant planning permission for the creation of a photovoltaic plant.
- 4.28 **Conclusion: A flat, previously developed site where existing planning policy would support B2 or B8 use. Given the location of the site and surrounding uses, it is considered that the site is unlikely to support largescale B8 development and is more likely to support industrial or waste uses.**

Port of Runcorn & Port of Weston



- 4.29 Port Runcorn and Port Weston are established industrial areas located on the south bank of the Mersey. Runcorn Docks is owned by the Manchester Ship Canal Company which is now part of the Peel Ports Group. Port of Weston, located to the south of Port of Runcorn is owned by Stobart Group Limited.
- 4.30 The area contains a range of employment and related uses (e.g. recycling and waste). The site benefits from waterside access as well as good access to the strategic road network via the A557 which is close by.
- 4.31 While the site would be an attractive location for B8 uses, availability for new development is limited. There is currently around 20 acres of land available within the area although this is scattered across a number of plots, none of which provide the opportunity for largescale B8 uses.
- 4.32 **Conclusion: Two existing port areas with associated employment related uses. There is no current availability to support large-scale B8 development within these areas.**

Astmoor Business Park, Central Redevelopment Area



- 4.33 Two plots at Astmoor Business Park is located in Runcorn to the north of the A533 and A558. The Central Redevelopment Area comprises two plots which are the locations for development relating to the new Mersey Gateway Bridge, which takes up the majority of the sites. There is some residual project land adjoining and beneath the new bridge structure. These sites are relatively small and are likely to come forward for smaller-scale B2 and B8 development.
- 4.34 **Conclusion: Residual land around the new bridge structure comprising relatively small plots more likely to come forward to support smaller scale employment uses.**

Land at Ditton Road



- 4.35 Partially developed and partially greenfield site located on the A562 to the north of the intermodal terminal at 3MG. The site currently comprises vacant and underutilised employment area and adjoining Council owned land. Part of the site has been used for an attenuation pond relating to the Mersey Gateway Project, leaving a developable site area of around 20 ha.
- 4.36 The site is allocated as a new employment location within emerging Local Plan. The site benefits from excellent access to the strategic road and rail network and benefits from a prominent frontage onto the A562. Vehicular access into the site is via Ditton Road which joins the A562 and A533 roundabout to the east.
- 4.37 Overall the site provides an attractive location for either B2 or B8 development making use of the nearby strategic transport links. Existing uses on site are smaller scale industrial uses, but it is considered that wholesale redevelopment of the site could support larger B2 or B8 uses.
- 4.38 There are a number of development constraints – the existing businesses within the existing industrial area of whole site could need relocating. Additionally there is known contamination requiring remediation work. This makes the site a prospect for delivering in the longer term.
- 4.39 **Conclusion: Partially developed site in very prominent location with excellent access to the strategic road and rail networks. The allocated employment site would be attractive for either B2 or B8 development and could support large-scale units for either use. However, there are**

a number of development constraints meaning the site is unlikely to come forward in the short-term.

Everite Road West



4.40 Existing business park in Ditton to the north of the 3MG sites. The site has good access to the strategic road network via the A562. The site is fully built out, however the quality of units is relatively poor and in need of modernisation. There are currently no development opportunities with the employment area.

4.41 **Conclusion: Existing industrial area with no current opportunities for development. The site is unlikely to be an attractive location for strategic B8 development without wholesale redevelopment of the entire site which is likely to be unfeasible.**

Sites in Knowsley

Land to the South of the M62 (part of Halsnead Garden Village)



- 5.1 This 21.6 ha greenfield site is located to the south east of the junction of the M62, M57, and A5300. It is accessed from the A5080. This site offers road-only access (and would not be rail connected) but benefits from good access to the city region's key route network, and to the national motorway network.
- 5.2 The land falls within a wider area identified for a mixed-use sustainable urban extension within the Knowsley Core Strategy (adopted January 2016), with this site being allocated for employment uses and as a country park. The allocation (Policy SUE2c) supports new employment development of at least 22.5 ha for logistics, storage and distribution uses (Use Class B8) and other appropriate employment uses within the Liverpool City Region key sectors subject to sequential and impact tests; together with a country park within the broad extent of the former Cronton Colliery. Further policy guidance is provided in a Masterplan Supplementary Planning Document, which was adopted in June 2017.
- 5.3 The site will be divided from residential uses by the M62, and is suitable for 24 hour operation. The policy requires provision for public transport, walking and cycling alongside development.

- 5.4 GL Hearn considers that this site benefits from excellent motorway links and is in a prominent location on the M62 with the potential for an access to be created close to the motorway junction. This is a very attractive site for B8 development.
- 5.5 **Conclusion: Allocated site with excellent motorway links and potential for large-scale B8 development. A prime site within the City Region for strategic B8 development with 22.5 ha of land available for B8 development in the medium-term.**

Knowsley Business Park, Kirkby

- 5.6 Knowsley Business Park is a large, established industrial estate containing a mix of B-class uses, located on the edge of Kirkby. It is located on the A580, which connects to the Port of Liverpool, and adjoins Junction 4 of the M57 which provides links to the M58 (north), M62 (south) and M56 (via Mersey Gateway), offering alternatives and resilience to the network. It is thus strategically well located in respect of road access.
- 5.7 The Business Park includes a number of larger units including larger warehouse/ distribution occupiers including Amazon, Matalan, Nagel Langdons and QVC. The larger units are generally located to the south of the employment area – closer to the A580. The northern part of the Business Park comprises generally smaller and older industrial units, although a number of sites have been consolidated through redevelopment.
- 5.8 There are a number of plots with development potential within the Business Park, which are considered below.

Knowsley 800



- 5.9 This is a 12.7 ha site located in the north-west corner of Knowsley Industrial Park. The site comprises flat, previously developed land which has been cleared and is currently vacant. Access is from Moss Lane/ Lees Road.
- 5.10 The Knowsley Local Plan Core Strategy (Policy CS11) particularly supports B2 and B8 development. Outline planning permission was granted to Peel Logistics in October 2015 for the erection of up to 76,000 sq m of B1/B2/B8 floor space on a 14.9 ha site area (including land to the south-west of the red line above); with the application showing the potential to deliver between 1 -3 warehouse units on the site. It is being marketed as Knowsley 800 as a design and build opportunity.
- 5.11 The site is located in the northern part of the business park which is a less prominent location and lower profile than other sites in the area. This also means road access to the site is through the large business park, which mostly comprises secondary industrial stock. For these reasons, it is considered that the site is more likely to be attractive for industrial occupiers and therefore less likely to contribute to meeting the strategic B8 need.
- 5.12 The site is located close to the rail terminal located to the north of the site. However, we understand the terminal has loading gauge constraints as it is only W6 loading gauge and so this limits the potential for it to be used by container trains, although there are future aspirations to upgrade the

line to W9 loading gauge. This notwithstanding, the rail accessibility is considered to provide limited commercial attractiveness for B8 uses at present time.

- 5.13 **Conclusion: This 14.9 ha, cleared and vacant site is well located within an established employment area. The site provides the potential to support large-scale B2 or B8 development, however given its less prominent position, access, and surrounding uses, it is considered more likely to be taken for B2 use.**

Land between Dairy Crest and Titan (Alchemy), East Lancashire Road



- 5.14 This 8.4 ha site is located within Knowsley Industrial Park on the edge of Kirkby. The site is located on the A580 close to the junction with the M57 (Junction 4). The site fronts directly onto and is accessible directly from the A580.
- 5.15 A hybrid planning application (16/00567/HYB) was approved in March 2018 granting consent for 9,709 sq m and outline consent for 16,351 sq m of development within Use Classes B1b/c, B2 and B8 (with ancillary B1a).
- 5.16 The first phase of development is coming forward being delivered by Network Space and will deliver 3 units of 40,000 sq ft, 35,000 sq ft, and 21,000 sq ft. There remains a further 10 acres of

undeveloped land at the site (as well as potential linkages to sites to the north and west) and it is considered most likely that the site will come forward for similarly sized units.

- 5.17 **Conclusion: A prominent, well-located site within an established employment area, ready to accommodate development within the short-term. The first phase is coming forward to deliver medium sized units and is likely that the rest of the site will be similarly developed. Therefore the site is unlikely to contribute to the strategic B8 supply.**

Land at Academy Business Park



- 5.18 Existing employment site within Knowsley Industrial Park. The site, 5.0 ha in size, is located on the western edge of the business park with access directly off the A5208 which provides excellent links to the A580 and the M57.
- 5.19 Orbit Developments have planning consent (14/00787/FUL), granted in January 2015, for demolition of the existing units and redevelopment to provide two 110,000 sq ft units (Use Classes B1c, B2, B8 and ancillary B1a). The advertised units both contain high bay loading areas, and HGV trailer storage space.
- 5.20 One of the 110,000 sq ft units is currently being built out on a speculative basis, with anticipated delivery within 2 years.

- 5.21 **Conclusion: This site is within the existing employment area at Knowsley Industrial Park within close proximity to the A580 and M57. The site benefits from a prominent location and excellent road access and as such is an attractive location for strategic B8 uses. It would be reasonable therefore to expect the ongoing redevelopment is likely to contribute to the large-scale B8 supply within the next few years.**

North Perimeter Road / Moss End Way



- 5.22 A 5.3 ha greenfield site located on North Perimeter Road to the north of Knowsley Industrial Park. This site and land immediately adjacent to the west currently form part of an 8.4 ha site allocation in the Waste Local Plan. Therefore the site could be subject to a proposal for a Waste Transfer Station at any given point in the future.
- 5.23 The site is allocated within the Knowsley Core Strategy (adopted January 2016) with the policy particularly promoting B2 and B8 development, and/or development supporting key economic sectors.
- 5.24 The site is located just to the north of the established industrial area but is detached from the existing employment uses and does not relate well to the rest of the business park. The site is surrounded on three sides by open agricultural land and development of the site would have to be

sensitive to landscape impacts. The site therefore lacks the commercial profile of other sites within the business park.

5.25 The site is approximately 2 miles north of the A580 with the site accessed via Perimeter Road which is largely rural in nature but is suitable for HGVs. This relatively poor approach means the site is less attractive for B8 development.

5.26 The site is located close to the rail terminal located to the south of the site. However, we understand the terminal has loading gauge constraints as it is only W6 loading gauge and so this limits the potential for it to be used by container trains, although there are future aspirations to upgrade the line to W9 loading gauge. This notwithstanding, the rail accessibility is considered to provide limited commercial attractiveness for B8 uses at present time.

5.27 **Conclusion: The 5.3 ha site is located on the edge of existing employment area, however the site has poorer profile and access than the rest of the business park, thus making it less attractive for large scale B8 development. Furthermore, the site is allocated within the Waste Local Plan providing a potential constraint to development. Overall this suggests the site is more likely to come forward for smaller scale employment or waste uses.**

Land to the East of Knowsley Industrial and Business Park



- 5.28 7.2 ha site located on the eastern edge of Knowsley Industrial Park near Kirkby. The site is located on the A580 close to the junction with the M57 (Junction 4). The site is a greenfield site which is largely undeveloped and is currently under agricultural use. The site fronts directly onto the A580 although site access is currently via Ormskirk Road.
- 5.29 The site benefits from a commercially attractive location which is accessible from the city region's key road network; and good public transport accessibility. It is visually prominent from the A580 and could potentially form a 'gateway' site to the wider employment area. This makes the site an attractive location for high profile occupiers and would be attractive for either B2 or B8 uses.
- 5.30 The land forms part of a wider employment allocation for 31.4 ha of land made within the Knowsley Core Strategy (comprising this land and land to the north of the A580), which is identified as having a notional capacity for 7.2 ha of employment development. The site is bounded to the east by open agricultural land which is designated Green Belt. Development of the site would have to be sensitive to landscape and visual impact issues.
- 5.31 **Conclusion: Prominent, well located greenfield site, 7.2 ha in size, with development potential in short/ medium-term. The site is in a prominent and commercially attractive location which would be attractive to large-scale B2 or B8 uses.**

Overall Conclusions for Knowsley Industrial Park, Kirkby

- 5.32 **Bringing the evidence together, the Knowsley Industrial Park area includes a number of previously-developed land parcels within an established employment area, together with greenfield extensions, which provide potential to support a range of employment uses – including some strategic B8 development – in the short- and medium-term. The location benefits from strong accessibility from the strategic road network, and links to the Port of Liverpool.**
- 5.33 **There are five sites within the employment area which are 5 ha and above. These collectively provide 41.7 ha of land. The site assessment process has identified 5.0 ha at Academy Business Park which is likely to come forward for large scale B8 uses; and 7.2 ha at Land to the East of Knowsley Industrial and Business Park which is likely to come forward for either large scale B2 or B8 uses. The other sites are considered more likely to come forward for alternative employment uses.**

Site	Area	Recommendation
Knowsley 800	12.7 ha	More likely for B2 uses.
Alchemy	8.4 ha	Delivering units less than 100,000 sq ft.
Academy Business Park	5.0 ha	Large scale B8 uses.
North Perimeter Road	8.4 ha	Unlikely to be attractive for strategic B8 development.
Land to the East of Knowsley Industrial and Business Park	7.2 ha	Large scale B2 or B8 uses.

Beacon 62, Tarbock Road, Huyton



- 5.34 An 8.1 ha site located at the junction of the M57 and M62 motorways. The site is part greenfield and part developed, with part of the site accommodating Highways England Tarbock Compound. Access to the site is already established from Cronton Road (A5080) although with would potentially require improvements if use at the site was to intensify.
- 5.35 The site is on the southern tip of the Huyton Quarry industrial area and is bounded to the north by employment uses, to the south by the M62, and to the west by residential properties which may restrict operations on the western edge of the site.

- 5.36 The site is allocated for employment development (Use Classes B1, B2 and B8). Outline planning consent was granted in 2009 (09/00360/OUT) for a mix of commercial uses together with a hotel, but has since expired.
- 5.37 A planning application (17/00301/HYB) was submitted in May 2017 for a mixed use development including a retail foodstore, up to 6,500 sq m of use class B2 and B8 floorspace, up to 6,500 sq m of use class B1/B2 and B8 floorspace, as well as up to 1,000 sq m of A3 and A4 uses. The application is currently pending determination.
- 5.38 The mixed-use redevelopment leaves around 4-5 acres of land to the rear of the site to be developed for employment uses. The size and layout of the remaining area makes the site a more attractive prospect for smaller units and therefore this site is considered unlikely to contribute to the large-scale B8 supply.
- 5.39 **Conclusion: Well-located site adjoining the strategic road network which provides potential to accommodate strategic B8 development in the short/ medium-term. However, development of the site is more likely to support smaller industrial units rather than large scale B8 uses.**

Sites in Liverpool

Land to the West of Junction of Long Lane and Stopgate Lane



- 6.1 This site comprises 5.0 ha of previously developed land within the Liver Industrial Estate – an existing employment area in the Approach 580 West area of Liverpool. The site is flat and has been cleared and is currently vacant, which it has been for a number of years.
- 6.2 The site lies within the Liver Industrial Estate which is a well-functioning industrial estate, and the site is bounded by employment uses on 3 sides. The estate is home to a mix of employment uses and includes some trade counter uses, but predominantly comprises small/medium sized industrial (B2) units. Occupancy rates within the surrounding area are good and the unit quality and environment is generally good.
- 6.3 The site is accessed via Stopgate Lane (B5187) which joins the A580 approximately 700m to the south. Site access is already in place. The site is thus well located in respect of the port and city region's key route network. It benefits from access by public transport, and good access to available labour in North Liverpool.
- 6.4 The site could potentially accommodate a range of employment uses and the UDP policy allocates the site for industrial/ business development (Use Classes B1c, B2, B8). The location and nature of surrounding uses make the site more commercially attractive for smaller units serving the local industrial market rather than large-scale distribution uses, and therefore we would expect any redevelopment is more likely to be for smaller industrial uses – similar to those in the surrounding area.

Conclusion: Well-located 5.0 ha site in established employment area with good access to the port and the city region's key route network. However, the location of site within the existing industrial area makes development for smaller units more likely than strategic B8 development.

A580 Stonebridge Cross



- 6.5 22.4 ha site located to the east of the junction of the A580 and Stonebridge Lane. The site is located close to the M57, with Junction 4 approximately 1 mile to the east of the site.
- 6.6 The majority of the site comprises previously developed land which has been cleared and is now vacant. There is currently no vehicular access into the site with access to be created from the A580.
- 6.7 The site is located to the south of the existing employment area of Approach 580 East. This employment area is partly built out and includes a mix of employment uses including large distribution depots occupied by HDL and TJ Morris. The employment area is performing well and the built out sites have been developed to a high quality. There are a number of smaller vacant plots within Approach 580, but none of which are of a size/shape to support large scale distribution units.
- 6.8 The areas to the south, east, and west of the site is the largely residential area of Croxteth and there is a residential site currently being built out which adjoins the southern corner of the site.
- 6.9 The site is currently being advertised as a design and build opportunity offering immediately deliverable warehouse units ranging in size from 86,000 sq ft to 690,400 sq ft. The site benefits from extant planning permission (13F/1838), granted in 2013, to erect an 117,497 sq m storage and

distribution centre with ancillary office (within Use Classes B8 and B1). Development has not yet commenced.

- 6.10 **Conclusion: Large flat site on the A580 close to the junction with the M57 and existing employment area at Approach 580 East. The site is in an excellent location for strategic B8 uses and such uses should be supported at the site. The site benefits from planning permission for the erection of a 117,597 sq m B8 unit, although development has not yet commenced. The site contributes 22.4 ha to the strategic B8 supply.**

Estuary / Liverpool International Business Park, Speke



- 6.11 The former Northern Airfield site in Speke is a large employment area in the south of Liverpool comprising a range of sites for employment uses, the majority of which have been built out and are occupied.
- 6.12 The employment area is generally of a high quality: the internal roads and circulation is good; the units are modern and of good quality; and the general environment is well kept. Key infrastructure is in place. The site relates well to the city region's key route network, including the A5036, M58 and M57. It benefits from good public transport accessibility.

- 6.13 There is one vacant site over 5 ha remaining – the 5.1 ha site to the north of the Prinovis unit. This site is owned by Prinovis and provides a potential expansion area for their operations. The site is therefore not considered to contribute to the strategic B8 supply.
- 6.14 **Conclusion: The business park is now almost completely built out with only one vacant plot over 5 ha. This plot is owned by Prinovis and if it comes forward it will be to support their existing operation at the neighbouring site. It should not be considered to contribute to the strategic B8 supply.**

Sites in Sefton

Land east of Maghull



- 7.1 Large site located to the east of Maghull and to the west of the M58. The site is largely flat undeveloped open agricultural land. The 86 ha site is allocated for housing and employment uses in the Sefton Local Plan (policy MN2.47) with 20 ha (net) for employment uses (expected to comprise the north-eastern portion of the site). The allocation supports B1, B2 and B8 use with access from Maghull Lane. Development is expected to commence in the early 2020s following the construction of two additional slip roads at junction 1 on the M58.

- 7.2 It is notable that the site adjoins the Liverpool – Ormskirk/ Preston Rail Line. The electrification of this line is a medium-term aspiration (2019-24), however the potential for rail freight is limited by the loading gauge capacity on the line. It is unlikely therefore that the site will be rail served.
- 7.3 The site is located adjacent to Junction 1 of the M58. However this junction has no motorway access in southbound directions at present. One of the development requirements for the site identified in Local Plan policy MN3 is that the proposed Business Park must not be occupied until the new slip roads are completed at Junction 1 of the M58. A junction improvement scheme was approved by the Combined Authority in June 2016, and is expected to be delivered and operational in May / June 2019.
- 7.4 The site benefits from a prominent location highly visible from the motorway and close to the junction. The site would be attractive for a range of employment uses and realistically is likely to support a mix of higher value employment uses to the front of the site with larger B8 units alongside the motorway. The exact mix depends on a range of factors including the final site layout, however an assumption of 50% strategic B8 and 50% smaller units is realistic at the site.
- 7.5 **Conclusion: A 20 ha (net) greenfield site adjoining M58 Junction 1 which relates well to the Port of Liverpool and provides the potential to accommodate strategic B8 development in the medium-term. Attractive for a range of employment uses, a realistic estimate is that around 10 ha is likely to be developed for strategic B8 uses.**

Atlantic Park, Dunnings Bridge Road Corridor



- 7.6 A designated employment site in Bootle located adjacent to the A5036. The site is part developed with internal roads in place and some plots already built out. The site forms part of the Dunningsbridge Road Corridor Strategic Employment Site, which is identified in Sefton Local Plan Policy MN2.48 for B1, B2 and B8 development.
- 7.7 The site is divided into a number of plots: Three plots are already built out with three office buildings and car parking facilities. In the centre of the site is a 260,700 sq ft warehouse building which is vacant and currently being advertised to let. The warehouse building pre-dates the other buildings at the site and is in a reasonably poor condition. There are eight remaining plots which are currently vacant and cleared and identified as capable of accommodating industrial/ warehouse floorspace with plot sizes ranging between 0.8 to 3.6 ha. Cumulatively (including the existing warehouse), the vacant developable site area for industrial/ distribution accommodation is 11.9 ha.
- 7.8 The site is located on the A5036 which links the Port with the M57, M58, and A59 and so is excellently placed for port related logistics uses. It is within Bootle and is bounded to the south by other employment uses, to the west by allotments, and to the east by residential properties which back onto the site and may impact on the potential for 24 hour operations. Aintree railway station is within walking distance.

- 7.9 A planning application (DC/2017/02223) for a 110,000 sq ft warehouse was submitted in January 2018 and is currently pending determination. This unit is being built on a speculative basis. There remains space at the site to support another 100,000 sq ft unit.
- 7.10 **Conclusion: The site is proximate to and relates well to the Port of Liverpool. It provides 11.9 ha of land which could accommodate strategic B8 development, and one such unit is currently coming forward on a spec basis.**

Sites in St Helens

Parkside Strategic Rail Freight Interchange, Newton-le-Willows

- 8.1 Parkside comprises two large flat sites either side of the M6 to the east of Newton-le-Willows together comprising 145 ha – Parkside West covering 80 ha and Parkside East covering 65 ha.

Parkside West



- 8.2 Parkside West is an 79.6 ha site which is the site of the former Parkside Colliery with an estimated developable area of 63.65 ha. It has been cleared and is now unused. While the site is within the Green Belt, it meets national Green Belt planning policy tests, including the demonstration of very special circumstances.

- 8.3 The site is located next to the M6 to the north west of Junction 22. The site is also close to Junction 9 of the M62. The site is approximately 25 miles from the Port, and has an approximate drive time of 34 minutes – further than most of the assessment sites. However, its location close to both the M62 and the M6 makes it well located for regional and national distribution markets and so the sites would likely be attractive for logistics uses including those relating to the Port.
- 8.4 The site is strategically located in respect of rail accessibility, at the crossroads of the West Coast Main Line and the Manchester-Liverpool Rail Line (via Newton-le-Willows). These have a W10 loading gauge.
- 8.5 The site is located on the edge of Newton-le-Willows and is within walking distance of Newton-le-Willows train station. The site is bounded to the north by two railway lines and to the west by Winwick Road (A49). There is open agricultural land to the south and east. Site access is currently via Winwick Road however the Core Strategy proposes a new or revised motorway junction to access the sites from the M6. The policy seeks to ensure that access arrangements avoid traffic sensitive routes; and ensure that the primary purpose of development is to facilitate freight travel by rail. Access improvements are programme by Merseytravel for delivery in the medium-term (2019-24). This includes provision of the rail connection, and a new link road to support development.
- 8.6 The site is excellently located next to the M6 and the proposed SFRI makes the site a very commercially attractive location for strategic B8 uses. Outline planning application (P/2018/0048/OUP) relating to approximately half (47.9 ha) of the site was submitted in January 2018. This would allow the delivery of up to 92,900 sq m of B8 floorspace (with ancillary B1(a)) and associated servicing and infrastructure. It is currently pending determination.
- 8.7 **Conclusion: A prime site within the City Region providing potential for 63.65 ha of strategic B2 and B8 development at a location which provides excellent access to strategic road and rail networks. A planning application to develop 47.9 ha of the site for B8 uses is currently pending determination.**

Parkside East



- 8.8 Parkside East is located on the eastern side of the M6 opposite the former colliery site (Parkside West). The site is currently open agricultural land covering 64.55 ha with an estimated developable area of 51.64 ha. The site is allocated in St Helens Core Strategy for expansion land for the Parkside West site. While the site is within the Green Belt, the policy supports employment development where it can be demonstrated to have very special circumstances.
- 8.9 The site is located next to the M6 to the north west of Junction 22. The site is also close to Junction 9 of the M62. The site is approximately 25 miles from the Port, and has an approximate drive time of 34 minutes – further than most of the assessment sites. However, its location close to both the M62 and the M6 makes it well located for regional and national distribution markets and so the sites would likely be attractive for logistics uses including those relating to the Port.
- 8.10 The sites are allocated for a Strategic Rail Freight Interchange (SFRI) within St Helens Core Strategy (Policy CAS3.2), which was adopted in 2012. Research undertaken by AECOM (August 2016) identifies significant market demand for an SFRI at this location and estimates the potential for SRFI related warehousing with around 251,745 sq m floorspace. This is based on a total area of 64.55 ha to be used for SRFI related employment (B2/B8) floorspace. The proposal includes a new link road from East of M6 J22 (A579) through Parkside East over existing A573 (Parkside Road) into Parkside West and across the the A49 Newton Road.

- 8.11 **Conclusion: A prime site within the City Region to support development of a new SFRI and the potential for 51.64 ha of related employment uses. This site provides an attractive location for regional and national distribution activities, and would be an attractive location for large scale B8 and B2 uses. Infrastructure requirements mean the site represents a medium- to long-term prospect.**

Land to the North of Penny Lane, Haydock



- 8.12 11 ha greenfield site located on the eastern edge of Haydock Industrial Estate on the northern edge of Haydock. The site is bounded to the west by the industrial estate and to the east by the M6. The site is currently under agricultural use.
- 8.13 The site is located approximately 500 metres north of Junction 23 of the M6 and the A580, with access to the junction via Penny Lane and Lodge Lane.
- 8.14 Haydock Industrial Estate is a large established industrial area on the northern edge of Haydock. The area lies directly to the north of the A580 (East Lancs Road) which divides the industrial area from the more residential areas to the south. Access into the industrial estate is directly from the A580. The area contains a wide range of employment uses ranging from small scale industrial and

workshop space up to large distribution centres. Large distribution uses in the area include the Sainsbury's Distribution Centre, Booker Distribution Centre, and Malcolm Logistics Services.

- 8.15 The area is generally performing well and has reasonably high occupancy levels. The existing employment area is almost completely built out and there is very limited opportunity for further development or potential intensification of uses in the area. The site provides a natural expansion of the existing industrial area.
- 8.16 A hybrid planning permission (P/2015/0571/HYBR) was granted in September 2016 including full planning permission for the erection of two B8 warehouses: one 373,000 sq ft and one 125,000 sq ft. The larger unit is subject to a pre-let agreement, with the smaller unit being built speculatively.
- 8.17 **Conclusion: Greenfield site on the edge of the existing Haydock Industrial Estate, providing a natural expansion of the industrial area close to the M6 and A580. The site benefits from planning permission for B8 uses and should therefore be considered as part of the strategic B8 land supply.**

Land at Florida Farm North, Haydock



- 8.18 35.2 ha greenfield site located on the western edge of Haydock Industrial Estate on the northern edge of Haydock. The site is bounded to the east by the industrial estate and to the west/north by open agricultural land. Development has commenced on site with infrastructure works being undertaken. The site is located within the Green Belt and as such development of the site would have to be sympathetic to this designation.
- 8.19 The site is located directly to the north of the A580 and a new vehicular access into the site would need to be created from the road. Junction 23 of the M6 is approximately 1.5 miles to the east.
- 8.20 Haydock Industrial Estate is a large established industrial area on the northern edge of Haydock. The area lies directly to the north of the A580 (East Lancs Road) which divides the industrial area from the more residential areas to the south. Access into the industrial estate is directly from the A580. The area contains a wide range of employment uses ranging from small scale industrial and workshop space up to large distribution centres. Large distribution uses in the area include the Sainsbury's Distribution Centre, Booker Distribution Centre, and Malcolm Logistics Services.
- 8.21 The area is generally performing well and has reasonably high occupancy levels. The existing employment area is almost completely built out and there is very limited opportunity for further development or potential intensification of uses in the area. The site provides a natural expansion of the existing industrial area.
- 8.22 The site is being marketed by Bericote Properties as 'M6 Major' as a design and build opportunity for up to 1.4m sq ft of B2 industrial and B8 distribution. The site can deliver a single unit up to 950,000 sq ft.
- 8.23 A hybrid planning application (P/2016/0608/HYBR) relating to the site has been granted planning permission. The application includes outline planning permission for the erection of 2 commercial/industrial buildings providing up to 135,000 sq m of employment floorspace (B2/B8 uses with up to 10,000 sq m of office accommodation), along with the provision of a new access to the A580 East Lancashire Road and internal site access roads.
- 8.24 **Conclusion: Greenfield site on the edge of the existing Haydock Industrial Estate, which would provide an expansion of the industrial area. The site is located on the edge of the existing industrial area and close to the M6 and A580 and represents a commercially attractive location for both B8 and B2 uses.**

Sites in West Lancashire

XL Business Park, Skelmersdale



- 8.25 XL Business Park is an existing employment area located to the north west of Skelmersdale. The Park comprises a range of employment uses, including three large distribution depots occupied by DHL, Asda, and Great Bear Distribution. There are two vacant plots at the Business Park: Plot B and Plot D.
- 8.26 The Business Park is located approximately 1.5 miles to the north of the M58 Junction 4. Access to the site is via the A5068 which is a dual carriageway. The site is located 13.5 miles to the east of the Port. This site benefits from good access from the strategic road network; and good public transport accessibility.
- 8.27 There are two vacant plots at the business park - Plot B (to the south) and Plot D (to the north). Plot B comprises 6.0 ha. The site is bisected by Slate Lane – a small minor road. Plot D comprises 11.0 ha and site is bisected by power lines running across the site east to west.
- 8.28 Plot D is subject to outline planning application (2018/0281/OUT) (March 2018) for the erection of two buildings for B1(c), B2 and B8 purposes with ancillary B1 offices. The application is currently pending

determination. The indicative site plan shows two units of 220,908 sq ft and 107,477 sq ft both offering HGV loading bays.

8.29 While the site could support either large scale B2 or B8 uses, the location and existing uses at neighbouring plots within XL Business Park means that B8 use is considered more likely to come forward at this location.

8.30 **Conclusion for XL Business Park: Two large vacant plots within the existing Business Park – one subject to a planning application to erect two large B2 / B8 units. The site is located close to the M58 with good dual carriageway access via the A5068. The site is considered an attractive location for strategic B8 uses and this type of use is considered more likely to come forward at the site.**

Sites in Wirral

Wirral International Business Park, Bromborough



9.1 This established business park accommodates a mix of industrial, warehouse/ distribution, and office uses. There is a particular concentration of manufacturing and warehouse/ distribution activity on the site, and it accommodates a number of larger B8 occupiers.

- 9.2 The site benefits from good access to the city region's key route network, the site is accessed from the A41 and is approximately 2 miles from the M53. However this is not considered the most commercially attractive location for strategic B8 uses in the City Region and would likely be considered by such occupiers as a secondary location. Access from the Port of Liverpool is via tunnel under the Mersey, and access to the regional and national motorway networks via the M53 and M56 is a less desirable corridor to reach the M6 than alternatives (e.g. M62, M58, A580).
- 9.3 This means that the site is generally considered more attractive for alternative employment uses – industrial and smaller, locally-based warehouse and distribution uses. However, as the supply of suitable sites elsewhere in the City Region remains fairly tight, especially in terms of oven ready sites, occupiers may looking towards sites in Wirral.
- 9.4 Due to the relatively cooler market demand for strategic B8 uses in the Wirral, only the most attractive sites are considered to have potential to support such development. Accordingly, when considering Wirral's sites contributing to the strategic B8 supply we have considered the proportion of sites likely to come forward for strategic B8 uses is much lower than the 80%/20% split seen elsewhere across the City Region, with a greater proportion of other employment uses considered more likely.

Former MOD Tank Farm, Old Hall Road



- 9.5 Located at the southern end of the employment area, this site comprises an 8.1 ha site which was previously a fuel storage facility, but has been cleared and is now vacant. The site is located in a relatively prominent position within the business park with vehicle access via Old Hall Road very close to the A41.
- 9.6 The site is designated as part of the Primarily Industrial Area on the 2000 Wirral Unitary Development Plan (UDP) Proposals Map (Policy EM6 refers) for B1/ B2/ B8 use, and has been vacant for some time. It is owned by Wirral Borough Council with a financial interest from the Homes and Communities Agency. Neighbouring uses are industrial, and there is potential for 24 hour operation.
- 9.7 **Conclusion: this 8.1 ha site is considered the most commercially attractive site for strategic B8 development within the business park due to its size and prominent location. Potential to be developed in the short-term. However, its attractiveness is caveated by the fact that it is outside of the City Region's core strategic B8 market areas.**

Centuria Business Park, Stadium Road



- 9.8 This is an 8.05 ha site, formerly occupied by a chemical factory, which is located in a less prominent location within the business park. The site is substantively overgrown and would require levelling to

support redevelopment. It will require significant decontamination before re-use. Although subject to previous consents for B1, B2 and B8 uses, some of which have been implemented, at Georgia Avenue, there is no extant planning permission. The site is allocated for B1/B2/B8 development in the Wirral UDP (Policy EM3).

9.9 Access could be provided through the existing Centuria Business Park (Georgia Avenue) or from Riverbank Road. There is an adjoining parcel of land (1.0 ha in size) on Riverbank Road which is owned by HCA and being marketed for development.

9.10 **Conclusion: A less prominent position in the business park and significant ground conditions make this a less attractive proportion for strategic B8 development than other sites in the City Region. While the site could potentially support larger B8 uses, it is considered that development for alternative uses is more likely.**

East of former Lubrizol/D1 Oils, Bromborough Coast



9.11 This is a 9.6 ha former landfill site, comprising reclaimed land adjoining the River Mersey. The development potential of the site will be influenced by environmental designations, including the impact on adjacent European protected sites. It is however allocated in the UDP for B1/ B2/ B8 development and registrable chemical uses (Policy EM5). The site potentially has direct water

access. Planning permission for the restoration of the development site was granted to the previous owners, Lubrizol Ltd in April 2006 (APP/2006/5068), which has been partially implemented.

- 9.12 The site is located in a less prominent location, to the rear of the business park, with the majority of the site lying to the rear of the oil and fuel plant to the south-west, and with an area of residential to the west. This would influence access and operation of the site.

Conclusion: The significant ground conditions and less prominent position in the business park influence the commercial attractiveness of this site for development. Overall, the site is not considered commercially attractive for strategic B8 use, and is considered unlikely to be redeveloped for such uses. The site should not be considered to form part of the supply for strategic B8 at a City Region level.

Overall Conclusions for Wirral International Business Park: A good quality established employment site which includes three larger plots, totalling 25.8 ha of vacant land. However, the site is outside of the City Region’s core strategic B8 market areas and as such the potential market for large scale B8 development is smaller than elsewhere in the City Region. Further to this, the historic data shows development and take-up of large scale distribution units in this area is relatively low. Accordingly, it is considered unlikely that there is demand to support all three sites to come forward for strategic B8 development. In our view, the Former MOD Tank Farm site represents the most commercially attractive site for strategic B8 uses and as such, we conclude that only this site should be considered as potentially contributing to the City Region’s strategic B8 supply.

Site	Area	Recommendation
Former MOD Tank Farm	8.1	Large scale B2 or B8 uses.
Centuria Business Park	8.05	Unlikely to be attractive for strategic B8 development.
East of former Lubrizol	9.6	Unlikely to be attractive for strategic B8 development.

Former Stone Manganese Site



- 9.13 This is a 6.9 ha site comprising previously developed land located to the south of the Kingsway Tunnel in Seacombe. The site lies within a dock-related industrial hinterland to the north of East Float and is bounded on three sides by industrial uses and by the Wallasey road tunnel. The site is designated as part of the Primarily Industrial Area on the Wirral UDP Proposals Map (Policy EM6) for B1/ B2/ B8 use.
- 9.14 There is a warehouse unit on the south west corner of the site which is currently being advertised to let. The rest of the site appears to be either being used for temporary outdoor storage or is vacant. The environment quality of the site and surrounding area is poor.
- 9.15 The site is located adjacent to the A5139 close to the junction with Gorse Lane and the start of the M53. The site is also located close to residential areas in Seacombe and Poulton, on the other side of the road tunnel access road, to the north, as well as the Wirral Waters redevelopment area to the immediate south. An appropriate buffer to any new residential development on the East Float may therefore also be needed.
- 9.16 **Conclusion: Site within an existing industrial area along the A5139, close to the Kingsway Tunnel and the start of the M53. The site is considered more likely to come forward for smaller industrial/warehouse uses commensurate with those in the surrounding area.**

Eastham Dock Estate, Eastham

- 9.17 The Eastham Dock Estate is a 146 ha area to be branded by Peel Ports as 'Port Wirral', a new modern Port and port centric distribution facility, making use of the location close to the beginning of the Manchester Ship Canal. This new port terminal would be centred on QE2 Dock in Eastham as well as Manisty Wharf and Ellesmere Port Docks.
- 9.18 The proposals include the development of a multi-modal transport interchange, incorporating road, water, and rail links, and could accommodate a phased transfer of port activity from Ellesmere Port Docks and Runcorn Docks. The scheme is currently intended to be implemented in phases over approximately a 20 year period.
- 9.19 The Dock Estate is not currently rail connected but as part of Peel Ports' aspirations for Port Wirral, there may be potential to connect the dock estate at Eastham to the rail network at Ellesmere Port in the medium/ longer-term subject to detailed feasibility assessment and funding.
- 9.20 There are two sites within the Port Wirral development area which currently represent a development opportunity. These sites have been assessed below. Together, these sites comprise 17ha. Potentially, there could be a greater quantum of suitable land brought forward as part of the Port Wirral development, however at this stage it too early to identify and assess these additional sites and so are not included as part of this study.

Eastham Dock Estate - North Road Tank Farm



- 9.21 A 9.3 ha site comprising previously developed tank-farm land bordering the Manchester Ship Canal and the Vauxhall Ellesmere Port Plant. The site is generally flat, cleared and considerably overgrown. The site is partially designated as part of the Primarily Industrial Area on the Wirral UDP Proposals Map (Policy EM6) and partly allocated for employment development (Policy EM3), in both cases for B1/ B2/ B8 use.
- 9.22 Development of the site must be considered within the context of the Port Wirral development. The site forms part of the larger area identified by Peel for the Port Wirral development, and falls wholly within the proposed development area. As such, should the Port Wirral development come forward, the site will form part of this development.
- 9.23 However, considering this site in the current context (or if the Port Wirral development does not come forward) the site is not prominently located, and is not considered an attractive location for large B8 uses being outside of the City Region's core strategic B8 market areas.

Eastham Dock Estate - Queen Elizabeth II Dock



- 9.24 A 6.6 ha site of undeveloped land directly to the south of Queen Elizabeth II Dock. The site is located approximately 1.5 miles to the north of the M53 (Junction 5), although access to the sites is currently via North Road which is a private road (Manchester Ship Canal). The site is allocated for employment development in the Wirral UDP (Policy EM3) for B1/ B2/ B8 uses. The emerging Wirral Core Strategy (Policy CS7) supports port-related storage, processing and distribution uses, and waterborne freight and rail transport.

- 9.25 The site does not fall within the proposed Port Wirral development area but is adjacent to it and would be a prime site to support port related uses – including strategic B8 – arising from the Port Wirral. GL Hearn would consider that development of the site for port-related warehousing is dependent on the Port Wirral Proposals coming forward, and in such circumstances the site could be considered a long term prospect.
- 9.26 However, considering this site in the current context (or if the Port Wirral development does not come forward) the site is not prominently located, and is not considered an attractive location for large B8 uses being outside of the City Region’s core strategic B8 market areas.
- 9.27 **Overall Conclusion for Eastham Dock Estate: The Eastham Dock Estate is the site for Peel’s proposed Port Wirral development, to create a new modern port and multi-modal (water, road, and rail) distribution facility. The scheme is intended to be implemented over approximately a 20 year period.**
- 9.28 **Should the Port Wirral development go ahead the ability of the sites to contribute to the strategic B8 need would need to be considered within the context of the wider 146 ha development, however it would seem that they are well placed to meet the future needs arising from the port and would constitute a long term (20+ year) development opportunity. As such the site is unlikely to come forward within the SHELMA study period (to 2037) and should not be considered as part of the supply at this point in time. Conversely, assessing the sites on their current context, the sites are not prominently located, and are in less a commercially attractive location for current strategic B8 demand.**

Wallasey Bridge Road, Birkenhead



- 9.29 Three former industrial sites located to the south of West Float fronting onto Beaufort Road (A5030) in Birkenhead. The sites are located in a predominantly industrial area and surrounding uses are mainly industrial. The sites have direct waterfront access and have good access to the M53 (Junction 1) approximately two miles to the north west via the A5139. Both sites are predominantly cleared and vacant. The site is 'white land' (i.e. without notation) having previously been designated as part of the dock estate on the Wirral UDP Proposals Map.
- 9.30 Currently the sites are not rail connected but as part of Peel Ports' aspirations for Birkenhead Docks (Port of Liverpool) there may be potential to re-connect the dock estate in Birkenhead Docks to the rail network via Bidston.
- 9.31 The sites have mostly been cleared and remediated. A single industrial unit remains roughly in the centre of the site and there remains some rubble in the north east quadrant. The site may require further remediation to bring it back into use.
- 9.32 As part of the Wirral Waters scheme the site is likely to generate interest for good quality industrial premises following remediation and regeneration. The site's location in proximity to the motorway network will also help attract interest. The site has quayside access to the West Float. The site is within the Mersey Waters Enterprise Zone and Peel are promoting the site as part of the MEA

(Marine, Energy and Automotive) Park which is aimed at manufacturers, developers, assembly operations, supply chain companies serving the marine and energy industries.

- 9.33 MEA Park will seek to build on key strengths and growth sectors, in particular the Energy Sector – offshore wind and civil nuclear – as well as automotive in supporting Jaguar Land Rover in Halewood, GM Vauxhall and Bentley. Phase 1 of MEA Park is targeting a Government R&D Catapult centre. The focus of the project will be a research centre for Modular Construction and Digital Design. It is envisaged that Phase 2 will be a multi-unit B1/B2/B8 project of circa 50,000 sq ft for engineering supply chains in the energy, maritime and automotive sectors.
- 9.34 In light of the development proposals for the site, it is considered more likely to be commercially attractive to manufacturing and R&D uses of uses rather than for strategic B8 uses.
- 9.35 **Conclusion: Sites providing good road access to the M53 and waterfront access part of the Birkenhead Docks estate. The sites have waterfront access, a good relationship to the strategic road network and support potential for development in the short/medium-term. The site forms part of the MEA Park focussed more towards industrial and R&D development. This, in addition to the fact that the site falls outside of the City Region’s core strategic B8 market areas, means that the site is more likely going to attract industrial and R&D users, rather than development for strategic B8 uses.**

Birkenhead Dock Estate - Bidston Dock



- 9.36 A 17.5 ha site located to the west of East Float in Birkenhead, close to Birkenhead Docks. The site fronts onto Wallasey Dock Link North (A5139) to the north, Wallasey Bridge Road to the east, Bidston Recycling Centre to the south, and open land to the west. The site has good access to the M53, with Junction 1 approximately one mile to the west of the site. The site is 'white land' (i.e. without notation) having previously been designated as part of the dock estate on the Wirral UDP Proposals Map.
- 9.37 The majority of the vacant site includes a former dock which has been infilled with inert wastes – which will likely be a considerable barrier to redevelopment, potentially splitting the developable site area into two smaller areas. The rest of the site is cleared previously developed land, comprising former port-related dockside facilities. This suggests that the site may require considerable remediation to bring it back into use.
- 9.38 Currently this site is not rail connected but as part of Peel Ports' aspirations for Birkenhead Docks (Port of Liverpool) there may be potential to re-connect the dock estate in Birkenhead Docks to the rail network via Bidston. Peel Ports Group in their Port Master Plan for the Port of Liverpool have outlined various aspirations to improve rail access to the Port of Liverpool including looking at the potential to reinstate the Birkenhead Docks rail link to the Port of Liverpool.
- 9.39 The site is not in an area with particularly strong demand for strategic B8 uses. The site is considered to be a more attractive location for industrial uses and other uses relating to the adjacent MEA Park.
- 9.40 **Conclusion: A prominent, vacant and largely flat site, located close to the start of the M53 and Birkenhead Docks. However, the site has considerable development constraints, as the site falls outside of the City Region's core strategic B8 market areas, means that redevelopment for strategic B8 use would seem unlikely, and that industrial uses relating to the MEA site would be more likely.**

Table 5: Site Assessment Findings and Net Site Areas (ha)

Local Authority	Site Name	Available land with development potential (Ha)	Likely to come forward for strategic B8 (ha)	Likely to come forward for either strategic B2 or B8 (ha)	Other uses / smaller development / longer term prospect	Planning Status	Green Belt	Vacant plot in existing employment area
Halton	3MG, Widnes	45.6	30.0	15.6	-	planning permission		
Halton	Widnes Waterfront	26.6	-	17.9	8.7	allocated in adopted plan		
Halton	Port of Runcorn and Port of Weston	0	-	-	-	allocated in adopted plan		
Halton	Astmoor Business Park, Central Redevelopment Area	7.9	-	-	7.9	no planning status		
Halton	Land at Ditton Road	20.0	-	20.0	-	allocated in emerging plan		
Halton	Everite Road West	0	-	-	-	allocated in emerging plan		
Knowsley	Land to the South of the M62	22.5	-	22.5	-	allocated in adopted plan		
Knowsley	Knowsley Industrial Park	41.7	5.0	7.2	29.5	allocated in adopted plan		✓
Knowsley	Land east of Roscoes Wood, Tarbock Road, Huyton	4.3	-	-	4.3	planning permission		
Liverpool	Land to the West of Junction of Long Lane / Stopgate Lane	5.0	-	-	5.0	allocated in emerging plan		✓
Liverpool	A580 Stonebridge Cross	22.4	-	22.4	-	planning permission		
Liverpool	Estuary/ Liverpool International Business Park, Speke	5.1	-	-	5.1	allocated in emerging plan		✓
Sefton	Land east of Maghull	20.0	10.0	-	10.0	allocated in adopted plan		
Sefton	Atlantic Park, Dunning's Bridge Road Corridor	11.9	-	11.9	-	allocated in adopted plan		✓
St Helens	Parkside West	51.6	-	51.6	-	live planning application	✓	
St Helens	Parkside East	63.7	47.9	15.8	-	allocated in emerging plan	✓	
St Helens	Land north of Penny Lane, Haydock	8.8	8.8	-	-	planning permission		
St Helens	Florida Farm North, Haydock	28.1	-	28.1	-	planning permission	✓	
West Lancs	XL Business Park	17.0	17.0	-	-	allocated in adopted plan / live planning application		✓
Wirral	Wirral International Business Park	25.8	-	8.1	17.65	allocated in emerging plan		✓
Wirral	Former Stone Manganese Site, Seacombe	6.9	-	-	6.9	no planning status		✓
Wirral	Eastham Dock Estate (Port Wirral)	15.9	-	-	15.9	allocated in emerging plan		
Wirral	Wallasey Bridge Road, Birkenhead	25.1	-	-	25.1	no planning status		
Wirral	Bidston Dock, Birkenhead	17.5	-	-	17.5	no planning status		
Total		493.4	118.7	221.1	153.6			

Total Developable Supply for Strategic B8

- 10.1 Bringing together the above analysis, Table 5 sets out the findings of the assessment. The table identifies the overall available supply of developable land at each of the sites and then quantifies, given current market conditions, the quantum of land which can be considered as likely to come forward for large-scale B8 development; the quantum which is likely to come forward for either large-scale B2 or large-scale B8 development; and sites where other uses (i.e. not large-scale B8) are more likely to come forward.
- 10.2 In total across the City Region the assessment identifies 118.7 ha of land at sites where large-scale B8 development is deemed likely to come forward given current market conditions.
- 10.3 In addition to this, the assessment identifies 221.1 ha of land which is likely to see large-scale development, however there is no indication at the present time whether these are more likely to support B2 or B8 uses. We have estimated the quantum of these sites coming forward for B8 uses based on a use-class split of 80% for B8 development and 20% for B2 suggested by the market evidence.
- 10.4 The table below shows the summary outputs for each local authority. Overall, the assessment suggests that across the City Region there is 295.6 ha which can be considered likely to support strategic B8 development.

Table 6: Summary table by Local Authority

Local Authority	Sum of strategic B8 (ha)	Sum of strategic B2 or B8 (ha)	Total
Halton	30.0	53.5	83.5
Knowsley	5.0	29.7	34.7
Liverpool	0.0	22.4	22.4
Sefton	10.0	11.9	21.9
St Helens	56.7	95.5	152.2
West Lancs	17.0	0.0	17.0
Wirral	0.0	8.1	8.1
Sub-total	118.7	221.1	339.8
Strategic B8 Total	118.7	176.9³	295.6

- 10.5 This total however includes a number of sites which are allocated in emerging Local Plans, sites which are currently under Green Belt designation, and plans with no planning status.
- 10.6 The table below shows the sites which are identified within the assessment as likely to support strategic B8 development including only sites which either benefit from planning permission for employment use or are allocated for employment uses in up to date adopted Local Plans. This

³ 80% of the Sub-total

shows that the current committed supply across the City Region provides a total of 171.3 ha across the City Region which can be considered likely to support strategic B8 development.

Table 7: Summary table – Committed Supply (Sites with Allocations and Permissions)

Local Authority	Sum of strategic B8 (ha)	Sum of strategic B2 or B8 (ha)	Total
Halton	30.0	33.5	63.5
Knowsley	5.0	29.7	34.7
Liverpool	-	22.4	22.4
Sefton	10.0	11.9	21.9
St Helens	8.8	28.1	36.9
West Lancs	17.0	-	17.0
Wirral	-	-	-
Sub-total	70.8	125.6	196.4
Strategic B8 Total	70.8	100.5⁴	171.3

Supply / Demand Balance

10.7 The Liverpool City Region SHELMA sets out the City Region’s demand for large-scale B8 development to 2037. The SHELMA considered two scenarios:

- a ‘Do Minimum’ scenario which identifies a need for 308 ha of large-scale B8; and
- a ‘Do-something/ Transport for the North Strategy’ scenario which identifies a need for 397 ha of large-scale B8.

10.8 Both demand scenarios include the new floorspace required for ‘replacement build’ which is like-for-like replacement for existing warehouse stock which is life expired; and ‘Growth Build’ which is the additional space required to support growth in freight through-put.

10.9 When identifying the quantum of employment land to plan for it is necessary to include a buffer to account for churn, flexibility, normal market vacancy and choice. The ‘replacement build’ element of the demand forecasting process will contribute to ensuring there is sufficient replacement of old stock supporting churn and flexibility in the market. Nonetheless, it is appropriate to provide a buffer accounting for the above factors to ensure flexibility in the supply.

10.10 We therefore include a buffer of 10% to the demand scenarios. This equates to roughly a year’s worth of annual take-up across the City Region. This results in the following need figures including a buffer:

- The ‘Do Minimum’ scenario + buffer : 339 ha
- The ‘Do-something/ Transport for the North Strategy’ scenario + buffer: 437 ha

10.11 The assessment of the current supply of sites set out in this report identifies a committed supply of 171.3 ha which is likely to come forward to meet the large-scale B8 demand. This is around half

⁴ 80% of the Sub-total

(51%) of the Do Minimum scenario and 39% of the Do Something scenario. This suggests there is a clear requirement to identify more sites across the City Region to meet the identified need.

- 10.12 The assessment also shows that if the supply of land likely to support strategic B8 development is extended to include sites which are currently within emerging Local Plans and/or are subject to current live planning applications then the supply increases considerably to 295.6 ha. However, this includes a number of sites – most notably the Parkside sites in St Helens – which are currently under Green Belt designation and would need to be removed from the Green Belt before development could come forward.

Table 8: Strategic B8 Supply / Demand Balance (ha)

	'Do Minimum' Scenario	'Do Something' Scenario
Land demand: scenario + buffer	339	437
Committed supply		171.3
Supply from emerging / potential sites		124.3
Total supply		295.6
Residual requirement	43.4	141.4

- 10.13 The assessment identified an overall supply of 295.6 ha of sites which would be considered likely to support large scale B8 development over the SHELMA period to 2037. This includes the committed supply of 171.3 ha, and the supply from potential supply (including sites in emerging Local Plans and with planning permissions pending decision) of 124.3 ha.
- 10.14 The total supply falls short of the identified requirement in either of the demand scenarios (339-437 ha). This results in a residual requirement for sites to support strategic B8 development which totals between 43.4 ha and 141.4 ha across the City Region by 2037.

APPENDIX A: Deals for industrial / warehouse space in the City Region, 2009-2017

Deal Type	Year	Address	Location	Total Floorspace (sq ft)	Use
sale	2012	School Ln	Knowsley BP	768,955	B8
lease	2014	Aston Ln N	Runcorn	650,313	B8
lease	2011	Dakota Dr	Liverpool	622,600	B8
sale	2009	Dakota Dr	Liverpool	622,600	B8
lease	2014	Statham Rd	Skelmersdale	518,620	B8
sale	2016	E Lancashire Rd	Liverpool	480,000	no data / other
sale	2010	Perimeter Rd	Liverpool	478,105	B8
lease	2012	Moorgate Rd	Liverpool	456,350	B8
lease	2017	Gillibrands Rd	Skelmersdale	420,000	B8
lease	2009	Desoto Rd	Widnes	420,000	B8
lease	2009	Eastgate Way	Runcorn	365,388	B8
lease	2011	East Lancashire Rd	Liverpool	360,309	B8
lease	2015	Blackheath Ln	Runcorn	343,311	B8
lease	2017	Ravenhead Rd	St Helens	307,320	B8
sale	2016	Boundary Ln	Liverpool	248,500	no data / other
lease	2014	Dunnings Bridge Rd	Bootle	210,000	B2
lease	2014	Moorgate Rd	Liverpool	199,250	B8
lease	2016	Lock St	St Helens	195,073	B2
lease	2016	Peel	Skelmersdale	193,578	B2
lease	2014	School Ln	Knowsley BP	191,436	B2
sale	2015	Oliver Lyme Rd	Prescot	180,350	B2
sale	2009	Abbotsfield Rd	St Helens	178,056	no data / other
sale	2014	Dunnings Bridge Rd	Bootle	160,048	B8
lease	2010	Dock Rd S	Wirral	158,500	no data / other
lease	2014	School Ln	Knowsley BP	157,907	B8
sale	2010	Aston Ln S	Runcorn	150,000	B2
lease	2015	Speke Blvd	Liverpool	149,588	B2
sale	2015	Delta Rd	St Helens	144,035	B2
lease	2014	Renaissance Way	Liverpool	139,817	B2
lease	2014	Moorgate Rd	Liverpool	137,250	B8
lease	2017	31 Estuary Blvd	Liverpool	132,000	B8
sale	2017	Abbotsfield Rd (Part of Multi-Property Sale)	St Helens	130,806	B8
lease	2013	Blackheath Ln	Runcorn	130,090	B2
lease	2010	Moorgate Rd	Liverpool	130,000	B8
lease	2010	Lister Rd	Runcorn	129,049	B8
lease	2009	Blackheath Ln	Runcorn	128,386	no data / other
lease	2016	Stretton Way	Liverpool	120,190	B2
lease	2009	Junction Ln	Newton Le Willows	116,472	B8
sale	2014	Junction Ln	Newton Le Willows	116,472	B8

lease	2016	South Boundary Rd	Liverpool	110,000	B8
lease	2013	Pimbo Rd	Skelmersdale	109,383	B2
lease	2015	Edison Rd	Runcorn	108,013	B8
sale	2013	Orrell Ln	Bootle	105,000	B8
sale	2012	Orrell Ln	Bootle	105,000	B8
lease	2009	Desoto Rd	Widnes	103,307	B8
lease	2013	Kitling Rd	Knowsley BP	102,825	B2
sale	2012	Edwards Ln	Liverpool	101,916	B2
lease	2016	Gillibrands Rd	Skelmersdale	100,427	B8
lease	2012	Aston Ln S	Runcorn	100,000	B8

Source: GL Hearn analysis of CoStar data