



**Lisburn &
Castlereagh
City Council**

Development Plan

Technical Supplement 3:

Employment Land Review

October 2019

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1.0 INTRODUCTION

Purpose of this Document

- 1.1 This Technical Supplement provides details of the evidence base used to inform the preparation of the Lisburn & Castlereagh City Council's Local development Plan (LDP) 2032, draft Plan Strategy. It is one of a suite of topic based Technical Supplements that should be read alongside the draft Plan Strategy and provides the rationale and justification for the strategic policies, allocations and proposals within the draft Plan Strategy.
- 1.2 It builds upon the suite of 14 thematic Position Papers prepared and published alongside the Preferred Options Paper (POP), which established the baseline position and identified the key issues that need to be addressed by the LDP.
- 1.3 The evidence base has been informed through an independent evidence-based study on Employment Land undertaken by professional consultants. The details of these reports were presented to Members during preparation of the policy for the draft Plan Strategy.
- 1.4 The main purpose of the research was to inform the emerging Local Development Plan (LDP), by identifying the potential future supply for employment growth within the Council area and provide a sound policy base for future planning decisions. The key requirements of the study were to provide:-
 - the employment land requirements for the Council area and how these relate to the strategic context;
 - possible scenarios for market recovery in the Council area in the short/medium/long- the suitability of the employment land portfolio to meet likely future job growth and emerging trends for employment ;
 - any gaps in the employment land provision in terms of quality, quantity and location and where relevant a broad indication of where site expansion could/should take place or where new sites could/should be allocated/developed;
 - the degree to which current demand and market aspirations match with the existing portfolio of sites, and a means to assess the outturn in terms of (for example) jobs per ha or floorspace per ha;
 - existing sites unlikely to be taken up which could be de-designated/de-zoned;
 - types of sites/buildings currently not provided for but for which a demand exists;
 - the relationship with adjoining authorities and the wider functional economic area and how this will impact on the provision of employment land and demonstrate "soundness tests" as set out in the Department for Infrastructure's revised Development Plan Practice Note 6 Soundnessⁱ in relation to proposal for future employment land;
 - existing development constraints together with their infrastructure and potential mitigation costs;
 - areas of search / sites for potential future employment development;
 - the location of future employment land and its sustainable relationship with potential locations for housing development/quantum of housing demand;
 - mixed use developments with emphasis on high value skilled employment opportunities.

2.0 POLICY CONTEXT

Regional Policy Context

- 2.1 The regional policy context is provided by the Regional Development Strategy 2035 (RDS), the Strategic Planning Policy Statement (SPPS) and regional Planning Policy Statements (PPSs). The latter are subject to the transitional arrangements set out in paragraphs 1.10-1.16 of the SPPS, which states that existing policy retained under the transitional arrangements will cease to have effect where a Council adopts its Plan Strategy. A summary of these documents and how they relate to plan making and employment land allocation is provided in the following sections.

Regional Development Strategy (RDS) 2035

- 2.2 The Regional Development Strategy 2035 (RDS) prepared under the Strategic Planning (Northern Ireland) Order 1999 by the Department for Regional Development (published 15th March 2012) is the spatial strategy for the Executive and provides an overarching strategic planning framework to facilitate and guide the public and private sectors and is material to decisions on individual planning applications.
- 2.3 The RDS provides a framework for strong sustainable economic growth across the region and recognises that a growing regional economy needs a co-ordinated approach to the provision of services, jobs and infrastructure. It provides Strategic Guidance (consisting of Regional Guidance (RG) and Spatial Framework Guidance (SFG)) to ensure an adequate supply of land to facilitate sustainable economic growth. The Spatial framework recognises the role of the Belfast Metropolitan Urban Area (BMUA) as the major driver for regional growth and the importance of hubs and clusters as the main centres for employment and services. Land should be accessible and located to make the best use of services, for example water and sewerage infrastructure, whilst avoiding, where possible, areas at risk of flooding from rivers, the sea or surface water run-off.
- 2.4 The RDS (RG1) states that the quality and viability of sites zoned for economic development uses in Area Plans should be assessed against an 'Employment Land Evaluation Framework' (Table 1) which will enable planning authorities to identify robust and defensible portfolios of both strategic and locally important employment sites in their development plans. This means protecting zoned land in development plans and, in order to capitalise on the development opportunity provided by a concentration of people, goods, available infrastructure and business, promoting economic development opportunities across the region focused on the BMUA and the Hubs.

Table 1: RDS 2035 Employment Land Evaluation Framework

<p>Stage 1 Taking Stock of the Existing Situation</p>	<p>An initial assessment of the ‘fitness for purpose’ including the environmental implications of the existing employment land portfolio. This is principally in order to identify the ‘best’ employment sites to be retained and protected and identifying sites that should clearly be released for other uses.</p>
<p>Stage 2 Understanding Future Requirements</p>	<p>Quantify the amount of employment land required across the main business sectors during the development plan period. This is achieved by assessing both demand and supply elements and assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites. Account should also be taken of turnover of existing sites due to relocation or closures. Both short/medium term and strategic provision need to be considered in this process.</p>
<p>Stage 3 Identifying a ‘New’ portfolio of sites</p>	<p>Devise qualitative site appraisal criteria to determine which sites meet the occupier or developer needs. Confirm the existing sites to be retained, replaced or released, and any gaps in the portfolio. In this allocation, consideration should be given to previously used sites, and in the reallocation, the environmental impact of one site relative to others should be included. The results of Stage 2, together with this site appraisal should provide a robust justification for altering allocations for employment land.</p>

- 2.5 A substantial part of the Lisburn & Castlereagh City Council area is contained within the BMUA hub¹. The RDS (SFG1) specifically recognises the important role of Lisburn in the BMUA and its location at the meeting point of the Belfast/Dublin economic corridor and the East/West transport corridor. It states that potential exists to grow the retail offer and create high quality offer through the creation of employment in business services. Potential also exists to generate a new driver for the night-time economy and to provide a range of flexible commercial accommodation and business parks at development locations such as Blaris and the Maze/Long Kesh (which is recognised as a site of regional significance.)
- 2.6 The RDS (SFG13) also recognises the importance in sustaining rural communities by facilitating the development of rural industries, businesses and enterprises in appropriate locations. This means not only businesses connected to farming, forestry and fishing but other industries such as recreation, tourism and renewable energy which can provide further jobs and opportunities in rural areas as long as they are integrated appropriately within a settlement or rural landscape.
- 2.7 Development Plans must ‘take account’ of the RDS. The RDS seeks to protect zoned land (RG1); promote economic development opportunities focused on the BMUA, Londonderry and Hubs (SFG1, SFG4 and SFG11); and provide a network of economic development opportunities which makes provision in Development Plans for an adequate and continuous supply of land for employment purposes (RG1).

¹ Lisburn City and Castlereagh form part of the Belfast Metropolitan Urban Area (BMUA). The nearest hubs are Craigavon and Banbridge to the South, Newtownards to the East and Antrim to the North.

Strategic Planning Policy Statement for Northern Ireland (SPPS)

- 2.8 The SPPS recognises the importance of economic development to meet the local employment and economic development needs of the area in a strategic manner and sets out regional policy objectives for economic development which are to:
- Promote sustainable economic development in an environmentally sensitive manner;
 - Tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality;
 - Sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
 - Support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
 - Promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and
 - Ensure a high standard of quality and design for new economic development.

Local Policy Context

- 2.9 The current planning policy context at a local level is complex as a result of a successful legal challenge to the adoption of the Belfast Metropolitan Area Plan (BMAP) 2015. There are therefore five existing development plans that relate to parts of the Lisburn & Castlereagh Council district, alongside draft BMAP (published in 2004) and post-inquiry BMAP (published in 2014). All of these documents will be superseded at the adoption of the new Local Development Plan 2032. The SPPS's transitional arrangements provide for continuity until such times as a new LDP for the whole of the council area is adopted to ensure continuity in planning policy for taking planning decisions.

Belfast Metropolitan Area Plan 2015

- 2.10 Although formally adopted in 2014, this process of final BMAP adoption was declared unlawful as a result of a judgement in the court of appeal delivered on 18 May 2017.
- 2.11 BMAP, in its most recent, post-examination form remains a significant material consideration in future planning decisions. It was at the most advanced stage possible prior to formal adoption. BMAP referred to throughout this document therefore refers to that version. However, in preparing this document the council has also had regard to the provisions of the draft BMAP which was published in 2004, the objections which were raised as part of the plan process and the Planning Appeals Commission Inquiry report.

Belfast Urban Area Plan (BUAP) 2001

- 2.12 The current development plan for the majority of the Belfast district is the Belfast Urban Area Plan (BUAP) 2001, which was adopted in December 1989. The area covered by the plan included the

whole of the administrative area of the former Belfast City Council area, together with the urban parts of the former district council areas of Castlereagh, Lisburn and Newtownabbey as well as Greenisland and Holywood.

- 2.13 The purpose of the BUAP was to establish physical development policies for this broad urban area up to 2001, clarifying the extent and location of development and providing a framework for public and private agencies in their investment decisions relating to land use. Although alterations were made in 1996, the BUAP is now largely out-of-date and was formally superseded by the BMAP in September 2014. However, as BMAP was quashed as a result of a judgement in the court of appeal delivered on 18 May 2017, the BUAP 2001 remains a statutory development plan.

Lisburn Area Plan 2001

- 2.14 Adopted on 4 July 2001, the Lisburn Area Plan sought to establish physical development policies for Lisburn and its surroundings up to 2001.

Lagan Valley Regional Park Local Plan 2005

- 2.15 The quashing of BMAP also means that the Lagan Valley Regional Park Local Plan (adopted in 1993) was re-instated as the statutory development plan for the Lagan Valley Regional Park (LVRP). It sets out the strategy and policies associated with the protection and enhancement of the natural and man-made heritage of the LVRP. Its main objectives are to conserve the landscape quality and features of the Lagan Valley and to enhance recreational use for the public.

Carryduff Local Plan 1988-1993

- 2.16 The adopted Plan comprises the provisions of the Draft Plan as approved and amended by the Adoption Statement. A composite Proposals Map and schedule for Carryduff was subsequently produced.

Lisburn & Castlereagh Community Plan

- 2.17 The Council took on responsibility for community planning in 2015 as a result of local government reform. Community Planning is enshrined in the Local Government Act (Northern Ireland) 2014 and places a duty on the Council along with a number of named partners to identify long-term objectives for improving the social, economic and environmental well-being of the district and the achievement of sustainable development while promoting equality of opportunity and good relations and tackling poverty, social exclusion and patterns of deprivation. The plan sets out a joint vision and long-term ambitions for the future, as well as outlining priorities for action.
- 2.18 The Community Plan vision for Lisburn & Castlereagh is 'An empowered, prosperous, healthy, safe and inclusive community'.

- 2.19 Delivery of this vision is based on a number of strategic outcomes. Councils must take account of their current Community Plan when preparing a Local Development Plan (LDP). The Community Plan include the supporting outcomes including that neighbourhoods are designed and regenerated to promote well-being, everyone lives in an affordable home that meets their needs, we have access to essential services, shops, leisure and workplaces and there is a modal shift to sustainable and healthy transport options.
- 2.20 The LDP will provide a spatial expression to the community plan, thereby linking public and private sector investment through the land use planning system.

3.0 KEY FINDINGS – POSITION PAPER 3 ON EMPLOYMENT

3.1 A summary of the key findings of Position Paper 3 Employment and Economic Development is provided below:

- Opportunity exists to maximise the strategic location of Lisburn on the Dublin economic corridor and East/West transport corridor, and improve connectivity throughout the Council area to enhance the movement of people, goods and services, and linkages between towns and rural areas;
- There is a need to recognise the potential that exists to attract large scale investment to kick start development on the Blaris Employment zoning through the provision of the M1 Knockmore Link, the North Lisburn Feeder Road and other improvements to the transportation system;
- Recognise the potential that exists to promote the regionally significant site Maze/Long Kesh which remains in public ownership to provide economic growth across the Council area;
- Opportunity exists to widen the existing economy base which is largely dependent on traditional/manufacturing, through promotion of knowledge based professional, scientific and technical sectors;
- There is a need to recognise the potential that exists for Lisburn city centre to grow its night-time economy;
- Key site requirements should address issues such as connectivity, infrastructure and provision of a high quality design environment.

4.0 EXECUTIVE SUMMARY OF EMPLOYMENT LAND REVIEW

4.1 The Employment Land Review was undertaken by Lichfields Planning Consultants between June and August 2019. The Report is summarised as follows:

4.2 The study involved three main stages:-

Stage 1 – Taking Stock of the Existing Situation

Stage 2 - Assessing B-Use Future Requirements

Stage 3 – Identifying a Site Portfolio

Methodology

4.3 The first part was an analysis of the current demographic, economic and physical context of the area and the ways in which these may impact upon the scale and direction of future employment growth. The second part was a quantitative assessment of the availability of different types of employment land and a review of recent trends in the local property market. The third part was a qualitative assessment of a sample of 20 employment site, based on a site assessment matrix developed by Lichfields (Appendix 3 of the main report) to inform the process. The fourth part was a consultation process with commercial property agents, carried out in May 2019.

Spatial and Economic Context

4.5 The Study summarised the key features of Lisburn & Castlereagh's economic context as follows:-

1 The key transport links within Lisburn & Castlereagh include the M1, the A1 and A3 in the Lisburn area, the A24 and A20 in the former Castlereagh area and the Belfast/Dublin railway located in Lisburn City. The road links to Belfast are crucial, given the strong economic connections with the regional city.

Lisburn & Castlereagh has a strong functional economic relationship with Belfast, as evidenced by high levels of out-commuting to Belfast City and a self-containment rate of 49.4%. At the same time, Lisburn & Castlereagh remains economically important to the region with 22,780 people commuting into the area.

2 The resident population in Lisburn & Castlereagh increased by 10.4% between 2007 and 2017 – a higher level of growth than both Northern Ireland and the UK. Lisburn & Castlereagh has a higher proportion of working age residents (62.7%) than the Northern Ireland average.

3 Lisburn & Castlereagh has relatively high economic activity rates, a low unemployment rate and similar levels of self-employment when compared to Northern Ireland and the UK.

4 The population of Lisburn & Castlereagh is well qualified, which in part explains a higher share of residents employed in professional occupations compared to Northern Ireland and the UK. However, gross average earnings for residents are higher than for workplace jobs in Lisburn & Castlereagh, indicating that to some degree people commute out from Lisburn & Castlereagh for higher paid jobs (mainly to Belfast).

5 Levels of deprivation are relatively low in Lisburn & Castlereagh, with only one Super Output Area (Old Warren) ranking in the top most 100 deprived Super Output Areas in Northern Ireland.

- 6 The largest sector in Lisburn & Castlereagh in 2017 was human health and social work activities, accounting for 13,690 jobs (19.9% of all jobs), followed by wholesale and retail trade with 13,015 jobs (18.9%).
- 7 Over the period 1993-2017, the majority of employment growth in Lisburn & Castlereagh was associated with non B-class sectors. The proportion of total jobs within the B use class sectors reduced from 38.5% to 35.0% during this period.
- 8 The number of jobs in the class B sectors increased by 17.4% between 1993 and 2017. However, this overall figure masks considerable variation between each of the sectors. There were increases in the number of jobs in the B1 sectors (63.3%) and B4 sectors (27.5%) but decreases in the B2/B3 sectors (21.6%).

Existing Employment Sites and Development Trends

- 4.6 The Study summarised the key features of Lisburn & Castlereagh's existing employment sites and development trends as follows:-
 1. The current supply of employment land indicated by the LPS data shows an approx. 60:40 split of offices and industrial/distribution uses in Lisburn & Castlereagh, with Lisburn City accommodating almost half of all commercial premises (47.7%).
 2. The total supply of land at the 30 main employment sites (developed and undeveloped) in Lisburn & Castlereagh is 579.7 ha. Land already in B class use accounts for 64.9ha, equivalent to 11.2% of the total supply, non-B class uses account for 24.2ha or 4.2% of the total supply.
 3. Of the land in B class uses, B2 class uses account for over half (53.1%), and B1 uses account for 25.4%.
 4. The area of land remaining to be developed is 275.4ha, the vast majority (91.6%) of which is greenfield.
 5. A total of 48 planning applications were approved by LCCC relating to "employment and industrial" uses between 2015 and 2019 (an average of 12 planning permissions per year). These relate to a range of uses, including light industrial floorspace, storage, factory and office floorspace.
 6. Between 2015 and 2019, a total of 11.97ha of B class employment land was developed, equivalent to an average of 2.99ha per annum.
 7. The highest levels of employment development were in the B1 use classes. A total of 4.8ha of B1 employment space was completed between 2015 and 2019, equivalent to 1.2ha per annum.
 8. Six proposals for the change of use from B use class to non-B use class were approved between 2015 and 2019 on zoned employment sites, resulting in a loss of 2.0ha of B class floorspace, equivalent to 0.5ha per annum. This suggests there is pressure on some existing industrial estates for redevelopment to non-B uses.

Market Feedback

- 4.7 Key issues and comments raised at the Invest Lisburn & Castlereagh Property Forum event in May 2019 and in questionnaire responses included:-
 1. Whilst the local economy is fairly healthy in Lisburn & Castlereagh, there is uncertainty in relation to the national economy and there are also areas for improvement, which indicate that there is a need to identify appropriate employment land in areas of demand in order to support the economy.

2. There are no particular concerns with the existing quantity of employment land but there may be a need to re-focus the supply on locations with good road connectivity – with particular emphasis on the importance of the Belfast to Dublin corridor. Traffic problems and links are key issues that should be taken into account in the zoning of employment land.
3. The distribution, manufacturing, transportation and food sectors are doing well in Lisburn & Castlereagh and should be supported through the provision of appropriate sites; however, it is noted that there has not been much demand for industrial premises.
4. There is market preference for existing properties that are cheaper to refurbish than new builds on undeveloped sites.
5. There is a need to support growth in the service sectors, which can be partly through mixed use developments.
6. There is support for the proposed Knockmore Link Road, which is considered to offer a key opportunity to open up the Lissue area for larger scale employment opportunities.

Future Need for Employment Space

- 4.8 The Study summarised the key features of Lisburn & Castlereagh’s future need for employment space as follows, with a caveat that there are inevitable uncertainties and limitations associated with modelling assumptions.
- 4.9 In this context, a range of scenarios were considered as summarised in Table 1 below. These scenarios give rise to a wide range of employment land requirements, ranging from +12.64ha to +44.85ha, equivalent to a range of +0.84ha to +2.99ha per annum. The past completions scenario implies the highest future requirement, significantly above the other scenarios considered.

Scenario	Total need (2017-2032) (ha)	Annualised need (ha)
Baseline	+12.64	+0.84
Baseline with no “netting off” employment land (Sensitivity 1)	+17.29	+1.15
Baseline with no “netting off” jobs (Sensitivity 2)	+24.70	+1.65
Past employment trends (1993-2017)	+22.22	+1.48
Labour supply	+21.50	+1.43
Past completions	+44.85	+2.99

Source: Lichfields analysis

Assessment of Employment Sites

- 4.10 A total of 11 of the 20 assessed sites scored highly in relation to access to the road network. However, the scoring process only considered access to A roads generally and did not specifically take account of the views expressed by consultees that the A1/M1 corridor should be a focus for employment zonings. Of the proposed sites, one is already well-located in relation to this corridor (LC10 – Blaris Industrial Estate, Altona Road, Lisburn) and the key strategic site (LC05 – Blaris Road, Lisburn (West Lisburn) would be better located if the proposed Lisburn & Castlereagh : Employment Land Review Knockmore Link Road is brought forward. The delivery of the Link Road would also substantially improve connectivity for a further 8 sites to the west of Lisburn: LC06, LC07,

LC09, LC11, LC12, LC13, LC14 and LC15.

- 4.11 A total of 12 of the sites scored well in relation to proximity to residential areas and community facilities. This is particularly important for the B uses that support larger numbers of jobs per square metre, i.e. B1 and B2 uses.
- 4.12 It is also important to take into account the need to avoid conflict between adjoining uses, which can be an issue particularly for heavier industrial uses (B3) and transport/distribution (B4). However, a total of only 4 of the proposed sites scored a “1” in this respect (MCH07, CR01, GY05 and LC08). Subject to the specific details of the proposals, these sites could still be suitable for business (B1) or light industrial use (B2).
- 4.13 The proposed sites include a mix of greenfield and brownfield undeveloped land but there is a higher proportion of greenfield land. The undeveloped areas within 12 of the sites were of greenfield status, and an additional 4 sites included an approx. 50/50 split of greenfield/brownfield land. Only 4 sites’ undeveloped areas constitute entirely brownfield land (LN07, MCH12, CF09 and MCH07). A preference for previously developed land is in accordance with the SPPS strategic objectives and RDS strategic guidance. However, conversely LCCC may seek to zone greenfield land in order to reduce the cost of development, thereby removing barriers to inward investment. The balance to be taken in this respect will be a matter of judgment for the Council.
- 4.14 A total of 10 of the 20 assessed sites scored poorly in terms of market demand, indicating that this is a concern generally. These sites are distributed across Lisburn & Castlereagh, with 4 in the Lisburn area (LC10, ML05, LC07 and LC08), 2 in Carryduff (CF09 and CF06), 2 in Dundonald (MCH12 and MCH13), 1 in Newtownbreda (MCH06) and 1 in Glenavy (GY05). However, 7 of the assessed sites did show signs of market interest. These sites are also spread across the area, with 3 to the west of Lisburn (LC09, LC14 and LC05), 1 in Carryduff (CF05), 1 in Moira (LN07), 1 in Newtownbreda (MCH07) and 1 in Crossnacreevy (CR01). This geographical spread of sites with varying levels of market interest indicates the extent to which market interest is not solely driven by location.

Conclusions and Policy Implications

- 4.15 Lisburn & Castlereagh is one of the smaller local authority geographies in Northern Ireland, but has a growing and skilled population, with higher than average economic activity rates and low unemployment.
- 4.16 There are currently around 69 000 workforce jobs in the local economy, and it has grown strongly in recent years, out-performing the job growth rate for Northern Ireland as a whole over the same period. The area is a net exporter of labour to Belfast and has a close functional economic relationship with the City. However, the area is also an important economic centre in the wider region, also attracting significant inflows of workers. The largest sectors in the Lisburn and Castlereagh economy are health and social work, wholesale and retail, followed by manufacturing, public administration and construction.

4.17 In recent years, the majority of job growth in the Council area has been within non B class sectors, while the overall share of B class jobs has declined (from 38% in 1993 to 35% in 2017). However B1 (business) and B4 (storage and distribution) jobs have grown strongly, whilst B2/B3 (light and general industrial) jobs have declined.

Future Employment Land Needs

4.18 The study identified that in order to ensure a flexible and responsive policy framework, it will be necessary to not just concentrate on meeting the forecast quantitative requirements for office and industrial space in Lisburn & Castlereagh, which will fluctuate over time, but to reflect on the opportunities and risks that flow from particular policy approaches. This could include how the delivery of B class employment land can be prioritised in particular areas for particular uses, reflecting market demand and economic potential, or to support sustainable development in the round.

Distribution and Quality of Land Supply

4.19 The assessment of sites undertaken as part of the ELR demonstrates that this portfolio provides a range of good and average quality sites across the LGD, not limited to a particular geographical area.

Key Areas

4.20 The following 5 key areas are identified:

- 1 Lisburn
- 2 Derriaghy
- 3 Carryduff
- 4 Newtownbreda
- 5 Dundonald

5.0 EMPLOYMENT LAND REVIEW

Lisburn & Castlereagh Employment Land Review

Lisburn & Castlereagh City Council

September 2019

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1.0 Introduction

- 1.1 Lisburn & Castlereagh City Council (‘LCCC’) commissioned Lichfields to undertake this Employment Land Review (‘ELR’) to inform its emerging Local Development Plan (LDP) (2017 to 2032).
- 1.2 The study is intended to provide an understanding of the current economic situation, the future needs of the local economy and businesses, and the requirements for ‘Class B’ employment land over the Plan period. It assesses the economic development needs in accordance with the requirements of the Strategic Planning Policy Statement for Northern Ireland (SPPS) (September 2015), Regional Development Strategy 2035 (RDS) (March 2012) and Planning Policy Statement 4: Economic Development (PPS4) (November 2010). The study also takes account of relevant best practice guidance that applies elsewhere in the UK, namely the Planning Practice Guidance (PPG).
- 1.3 The study has involved three main stages:
- 1 **Stage 1: Taking Stock of the Existing Situation:** analysis of the economic strengths and weaknesses of the local economy, functional economic area, and an assessment of the quality of the current portfolio of designated employment sites.
 - 2 **Stage 2: Assessing B-Use Future Requirements:** testing the implications of different employment and population growth scenarios on future employment space requirements for the Local Government District (LGD) of Lisburn & Castlereagh, using the most up-to-date economic forecasts and analysis of housing needs (based on the LCCC Housing Growth Study 2019).
 - 3 **Stage 3: Identifying a Site Portfolio:** considering the overall future demand/supply balance in quantitative and qualitative terms and analysing the suitability of proposed sites to meet future needs under each growth scenario.

Scope of Study

- 1.4 The assessment is based on a range of scenarios for how the Lisburn & Castlereagh economy could change in the future, with the employment space and land implications of the following B class uses considered in this study, as defined in Part B (Industrial and Business Uses) of the Schedule to the Planning (Use Classes) Order (Northern Ireland) 2015:
- 1 **B1 Business:** offices other than a use within Class A2 (Financial, professional and other services) (B1a), call centres (B1b) and research and development which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit (B1c).
 - 2 **B2 Light Industrial:** any industrial process which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit;
 - 3 **B3 General Industrial:** any industrial process other than one falling within Class B2; and
 - 4 **B4 Storage or Distribution:** use for storage or as a distribution centre.
- 1.5 References in this study to “employment space” include all of the B class uses above. The term “industrial space” is applied to include use classes B2, B3 and B4 uses. It should also be noted

that some employment/industrial land may have been developed for sui generis uses which do not fall into any particular use class.²

- 1.6 The study uses a combination of quantitative and qualitative analysis to examine these issues. The study has used the latest available data and other evidence available at the time of drafting, including:
- 1 Data on the local economic context from LCCC, Northern Ireland Statistics and Research Agency (NISRA), Office of National Statistics (ONS) and Oxford Economics (OE);
 - 2 LCCC's employment monitoring records;
 - 3 Econometric forecasts for LCCC produced by OE;
 - 4 Consultation with local agents; and
 - 5 Desktop assessments of a sample of 20 employment sites within Lisburn & Castlereagh.
- 1.7 The accuracy of third party data has not been checked or verified by Lichfields.
- 1.8 An important consideration for any technical work of this type is that the study is inevitably a point-in-time assessment. It may therefore be necessary to update the analysis within this study in the future.

Methodology

- 1.9 The overall approach of this study is to build upon the current context in Lisburn & Castlereagh and to provide a basis for employment land provision within the emerging LDP. It is based on an analysis of the current demographic, economic and physical context of the area and the ways in which these may impact upon the scale and direction of future employment growth. A detailed review of the current context is the first part of the study.
- 1.10 The second part is a quantitative assessment of the availability of different types of employment land. In addition, a review of recent trends in the local property market and demand for different types of employment space is undertaken, based upon a review of published statistics relating to levels of development and amounts of existing floorspace.
- 1.11 The third part is a qualitative assessment of a sample of 20 employment sites, based on a site assessment matrix developed by Lichfields (Appendix 3) to inform this process. This has been based on a desk-top review and site inspections undertaken by Lichfields at 10 of these sites, accompanied by planning officers from LCCC.
- 1.12 The fourth part is a consultation process with commercial property agents at an Invest Lisburn & Castlereagh Property Forum event held in May 2019. Following this event, agents were invited to complete a questionnaire providing information on local market conditions and issues affecting the need for and supply of employment land.

Structure of Report

- 1.13 The report is structured as follows:
- Section 2 summarises the national and local policy context for Lisburn & Castlereagh and its implications for planning for the provision of employment land.

² Sui Generis – 'of its own kind': in this context refers to land uses which do not fall into any particular use class in the Planning (Use Classes) Order (Northern Ireland) 2015

- Section 3 reviews the current spatial, demographic and economic context of Lisburn & Castlereagh and identify the ways in which these matters impact upon the scale and direction of potential future employment growth.
- Section 4 assesses the current stock of employment land, and trends in the supply of employment land coming forward in terms of planning permissions granted and also the loss of employment land/floorspace to other uses.
- Section 5 details feedback from consultation with local commercial property agents in order to obtain qualitative evidence on market conditions and the supply and demand for employment land within Lisburn & Castlereagh.
- Section 6 analyses relevant indicators, including econometric forecasts, past trends, and projections of the local workforce in order to identify potential future employment land needs to 2032.
- Section 7 assesses the quality of a sample of the main existing employment sites within Lisburn & Castlereagh in terms of their 'fitness for purpose' to meet future employment land needs.
- Section 8 draws overall conclusions on the quantitative and qualitative balance of employment land and the planning policy implications for supporting an appropriate level of economic and employment growth within Lisburn & Castlereagh.

2.0 Policy Context

2.1 This section sets out the planning policy and economic framework for the ELR. It provides a summary of relevant planning and economic strategy documents and provides the context for future employment land allocations and employment policies.

Legislative Context

2.2 Under the Planning Act (Northern Ireland) 2011, in April 2015 most planning functions were devolved from the Northern Ireland Department of Environment to the 11 councils in Northern Ireland. This has resulted in a two-tier planning system, within which councils are responsible for the production of a Local Development Plan for their areas, with the Department for Infrastructure providing an oversight role. This reform of local authorities within Northern Ireland included the amalgamation of Lisburn and Castlereagh into one Local Government District (LGD).

Northern Ireland: Planning Policy and Strategy

Regional Development Strategy (2012)

2.3 The Regional Development Strategy 2035 (RDS)³ is the spatial strategy of the Executive, which provides the long-term policy direction and strategic spatial perspective for planning in Northern Ireland. The RDS has a statutory basis under the Strategic Planning (Northern Ireland) Order 1999.

2.4 The RDS provides strategic guidance at RG1 to help ensure “*an adequate supply of land to facilitate sustainable economic growth*”. It contains an Employment Land Evaluation Framework, setting out a three-stage process for identifying employment land allocations as part of the LDP preparation process (Table 2.1).

Table 2.1 RDS Employment Land Evaluation Framework

Stage	Task
1. Taking Stock of the Existing Situation	An initial assessment of the ‘fitness for purpose’ including the environmental implications of the existing employment land portfolio. This is principally undertaken in order to identify the ‘best’ employment sites to be retained and protected whilst also identifying sites that should be released for other uses.
2. Understanding Future Requirements	Quantify the amount of employment land required across the main business sectors during the development plan period. This is achieved by assessing both demand and supply elements and assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites. Account should also be taken of turnover of existing sites due to relocation or closures. Both short/medium term and strategic provision need to be considered in this process.
3. Identifying a ‘New’ portfolio of sites	Devise qualitative site appraisal criteria to determine which sites meet the occupier or developer needs. Confirm the existing sites to be retained, replaced or released, and any gaps in the portfolio. In this allocation, consideration should be given to previously used sites, and in the reallocation, the environmental impact of one site relative to others should be included. The results of Stage 2, together with this site-appraisal should provide a robust justification for altering allocations for employment land.

Source: RDS (Table 3.1)

³ Department for Regional Development, Regional Development Strategy 2035, (2012)

- 2.5 The RDS states that employment land should be accessible and located to make the best use of available services, whilst avoiding, where possible, areas at risk of flooding. It also states that the focus will be on larger urban centres and regional gateways, in order to take advantage of their locations on the regional transport network.

Strategic Planning Policy Statement for Northern Ireland (2015)

- 2.6 The Strategic Planning Policy Statement for Northern Ireland (SPPS) (September 2015)⁴ sets out the framework for planning across Northern Ireland, including in relation to the preparation of LDPs. It has a statutory basis under Part 1 of the Planning Act (Northern Ireland) 2011.
- 2.7 The SPPS states at Paragraph 3.3 that planning authorities should deliver on all three pillars of sustainable development when formulating policies, including the economic aim to promote *“economic recovery and balanced growth”* and to tackle disadvantage by *“ensuring economic considerations are accorded appropriate weight in plan preparation.”*
- 2.8 The SPPS sets out six strategic objectives at Paragraph 6.82 for facilitating economic development through the planning system, which apply specifically to employment land in the B use classes:
- *“promote sustainable economic development in an environmentally sensitive manner;*
 - *tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality;*
 - *sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;*
 - *support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;*
 - *promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and,*
 - *ensure a high standard of quality and design for new economic development.”*
- 2.9 The SPPS states at Paragraph 6.92 that a fundamental role for LDPs is *“to ensure there is an ample supply of suitable land available to meet economic development needs within the plan area.”* In order to do this, the SPPS states (also within this paragraph):
- “LDPs should offer a range and choice of sites in terms of size and location to promote flexibility and provide for the varying needs of different types of economic activity. Account should also be taken of factors such as accessibility by all members of the community, connectivity with the transportation system (particularly public transport), the availability of adequate infrastructure, the specialised needs of specific economic activities, potential environmental impacts and compatibility with nearby uses including the operational requirements of existing or approved economic development.”*

⁴ Department of the Environment, Strategic Planning Policy Statement for Northern Ireland (SPPS): Planning for Sustainable Development, (2015)

Planning Policy Statement 4: Planning and Economic Development (2010)

- 2.10 Planning Policy Statement 4 (PPS4) (November 2010)⁵ sets out the policies of the Department of the Environment on planning for economic development uses, defined as those in the B use classes. The SPPS states at Paragraph 1.9 that the existing Planning Policy Statements will be cancelled when all 11 councils have adopted a new Plan Strategy for their area. In the interim, a transitional period will operate when councils will apply existing policy contained within the PPS documents, including PPS4. Paragraph 1.11 of the SPPS states that when the council adopts its Plan Strategy, existing policy retained under the transitional arrangements shall cease to have effect.
- 2.11 The key aim of PPS4 is to facilitate the meeting of economic development needs of the region in ways that are consistent with protection of the environment and the principles of sustainable development.
- 2.12 Paragraph 3.1 sets the objectives of PPS4 as the following:
- *“promote sustainable economic development;*
 - *tackle disadvantage and facilitate job creation;*
 - *sustain a vibrant rural community;*
 - *support the re-use of previously developed economic development sites and buildings;*
 - *promote mixed use development and improve integration between transport, economic development and other land uses, including housing; and*
 - *ensure a high standard of quality and design for new economic development.”*
- 2.13 PPS4 states at Paragraph 4.21 that development plan proposals will need to meet economic development needs, by using the following measures:
- “(a) designate/zone an ample supply of land available to meet identified economic development needs in a range of sites offering a choice of size and location, to accommodate a wide and flexible range of development opportunities;*
- (b) include, as part of this land supply, the safeguarding of existing economic development land where it remains suitable for continuation or expansion of this use;*
- (c) designate/zone where appropriate areas for mixed use development, to include residential and economic development use that also forms part of the land supply;*
- (d) identify areas where Business Use Class B1(a) – office use – is acceptable;*
- (e) reallocate for alternative use existing economic development sites, either developed or undeveloped, where the potential future use for economic development purposes is not considered realistic.”*
- 2.14 It also states at paragraph 4.21 that the particular types of economic development use that will be permissible within any designated/zoned site or within mixed-use areas should be specified.

⁵ Department of the Environment, Planning Policy Statement: Planning and Economic Development, (2010)

Belfast Metropolitan Area Plan (draft, 2015)

- 2.15 The Belfast Metropolitan Area Plan (BMAP) 2015⁶ was adopted in September 2014 but this adoption was declared unlawful as a result of a judgement in the court of appeal delivered on 18 May 2017. However, the BMAP, in its most recent, post-examination form remains a material consideration.
- 2.16 Lisburn & Castlereagh forms part of the Belfast Metropolitan Area, which also includes:
- 1 Belfast City;
 - 2 Carrickfergus Borough;
 - 3 Newtownabbey Borough; and
 - 4 North Down Borough.
- 2.17 As part of the Belfast Metropolitan Area Plan framework, with regards to employment, the role of the BMAP was to establish a framework which was supportive of business needs.
- 2.18 The proposals for the Lisburn area facilitate the expansion of economic growth in accordance with the BMAP Employment Strategy. This strategy identifies West Lisburn/Blaris as a Major Employment Location, which forms part of approximately 152 hectares of land zoned for employment in the Lisburn City Council area.
- 2.19 The proposals for the Castlereagh area include 222 hectares of employment land (including existing employment land and a large mixed-use Mayor Employment Land (MEL) site at Purdysburn). Of the 222 hectares, approximately 180 hectares are within Castlereagh Urban Area (as defined by the settlement hierarchy set out in this report) and approximately 40 hectares within the rural area.
- 2.20 The BMAP District Proposals (Volumes 1 and 3) contain details of the sites which have been subject to assessment.

Lisburn Area Plan (2001)

- 2.21 The change in the Council's boundary as a result of the local government reform on 1 April 2015, and the subsequent quashing of BMAP, means that the Lisburn Area Plan 2001⁷ remains the statutory development plan for Lisburn and its surroundings. This includes Lisburn; Dunmurry; Hillsborough; Culcavy; and Moira in addition to subsequent villages including; Aghalee; Annahilt; Dromara; Drumbo; Glenavy; Lower Ballinderry; Maghaberry; Milltown; Ravernet; Stoneyford and Upper Ballinderry.
- 2.22 The Plan considers that it is essential that provision is made for as a full range of sites for industrial and business development as possible. The objective is to provide a 'balanced portfolio' of development opportunities including:
- (a) "sites capable of accommodating large scale firms on a national/international scale;
 - (b) sites capable of meeting regional development requirements;
 - (c) sites capable of meeting local needs; and
 - (d) a range of locations for business development."

⁶ Department of the Environment, Belfast Metropolitan Area Plan, (2015)

⁷ Department of the Environment, Lisburn Area Plan (2001)

- 2.23 The Belfast Urban Area Plan 2001 (BUAP) and the Carryduff Local Plan 1988-1993 also are retained as the statutory plans covering other parts of the Council area.

West Lisburn Development Framework (2018 Review)

- 2.24 The West Lisburn Development Framework⁸ is to be the overarching strategy document for a portion of the forthcoming Local Development Plan area and will establish a vision and strategy as well as guidance for future planning and investment for the next 20 years. This document was subject to review in 2018.
- 2.25 Objective 3 of the Framework seeks to:
- “Promote new and expansion of existing employment uses in the West Lisburn area.”*
- 2.26 This framework has not been subjected to Examination in Public, Strategic Environmental Assessment or Habitats Regulation Assessment and is such a non-statutory framework plan produced with the intention of being the overarching strategy document.
- 2.27 The Framework promotes the development of three distinct major employment zones in the West Lisburn: Maze Long Kesh, Blaris Lands and Knockmore/Lissue Lands.
- 2.28 Maze Long Kesh is designated as a Strategic Land Reserve of Regional Importance and as such is outside of the LDP process. LCCC has proposed the Blaris Lands (LC05) and Knockmore/Lissue Lands (MCH13) sites for zoning in the emerging LDP, both of which are considered in this ELR.

Investment Plan

- 2.29 ‘Connect, Invest, Transform’ is the 10-year investment plan for Lisburn & Castlereagh. There are three priorities in the Plan:
- 1 Communities;
 - 2 Economy; and,
 - 3 Infrastructure.
- 2.30 The Plan recognises the need to ensure jobs are created in Lisburn & Castlereagh to support the potential for future housing growth. It recognises the areas for future growth in terms of housing; West Lisburn strategic growth and Hillsborough through the City Deal supported by the recent investment in Hillsborough Castle. However, the plan is very much focused on ensuring there is investment right across the different parts of Lisburn & Castlereagh.

Emerging Local Development Plan (2017)

- 2.31 LCCC published a Preferred Options Paper for public consultation as part of the preparation of its emerging LDP in March 2017. The Preferred Options Paper sets out Strategic Objectives for the emerging LDP, including Strategic Objective B: Driving Sustainable Economic Growth:
- *“To support a thriving and diverse economy by providing sufficient land and locations for a range of employment facilitating the creation of new jobs which will accommodate population growth.”* and;
 - *“To identify Major Employment Locations in the Council area and protect sufficient and existing employment land from alternative uses.”*

⁸ Lisburn & Castlereagh City Council, West Lisburn Development Framework (2015)

3.0 Spatial and Economic Context

3.1 This section establishes the spatial and economic context for the study. It reviews recent economic conditions and trends within Lisburn & Castlereagh, relative to Northern Ireland and the UK. This is important in identifying the existing strengths and weaknesses of the study area and the factors likely to influence the nature and level of future demand for employment space.

Spatial Context

Geography and Connections

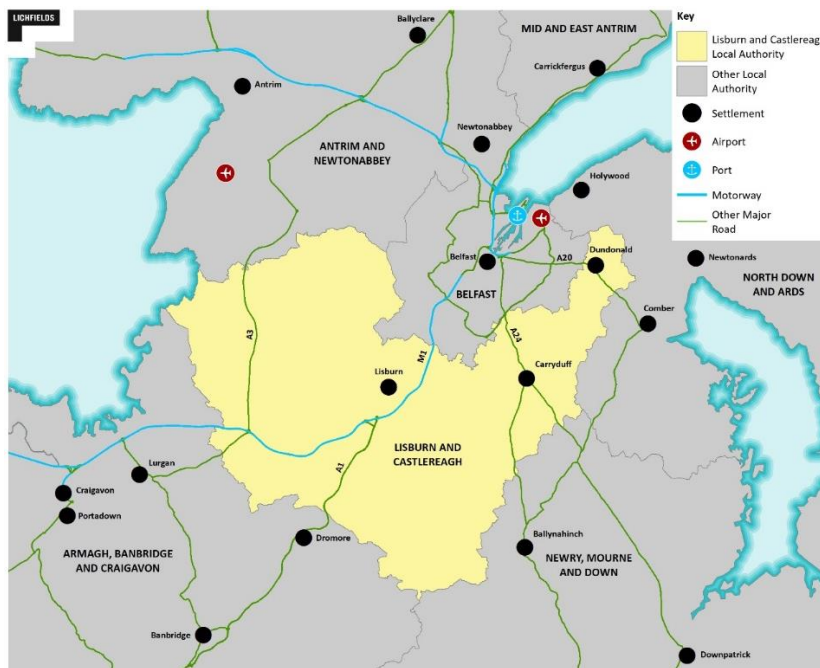
3.2 Lisburn & Castlereagh contains a mix of urban and rural areas and is located to the south west and south east of Belfast City. With a population of 142,700 in 2017, Lisburn & Castlereagh is Northern Ireland’s fourth smallest local authority by population.

3.3 The key settlements within the local authority are:

- 1 Lisburn City, Hillsborough and Moira in the former Lisburn Council area; and,
- 2 Dundonald, the Castlereagh Metropolitan Area (Gilnahirk, Braniel, Cregagh, and Newtownbreda) and Carryduff in the former Castlereagh Council area.

3.4 Lisburn City is situated on the main Belfast–Dublin transportation corridor at the interchange of the strategic highways: the M1 motorway the A1 dual carriageway and A3 Glenavy Road, and the strategic rail network. The M1 motorway forms a key part of the Regional Strategic Transport Network. These transportation routes into Belfast City centre from the south and west run through Lisburn and to a large extent onwards to the different parts of Castlereagh which are connected by the A55 outer ring road. The eastern area of Lisburn & Castlereagh LGD is served by key road connections including the A24 Saintfield Road and A20 Newtownards Road.

Figure 3.1 Spatial context map

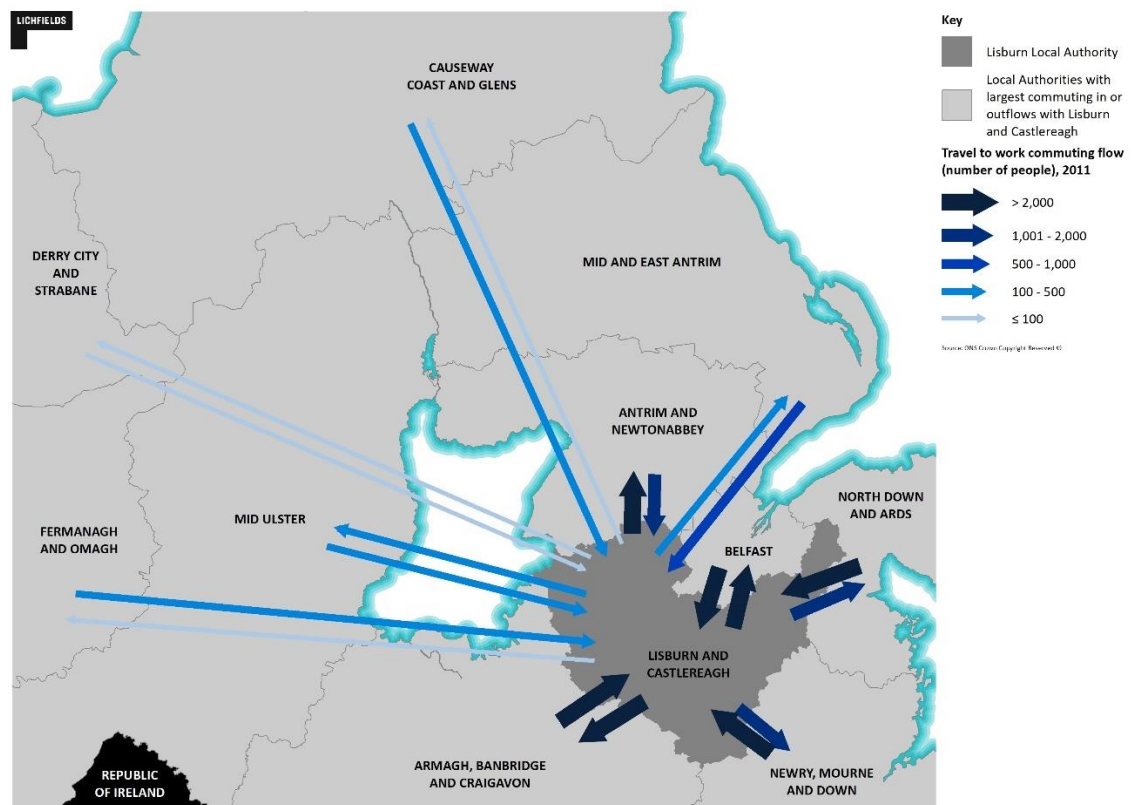


Source: Lichfields analysis

Functional Economic Market Area

- 3.5 Examining commuting flows and Travel-to-Work Areas can help to define the functional economic market area (FEMA) within which Lisburn & Castlereagh is located.
- 3.6 In 2011, approximately 43.2% of working residents aged 16 to 74 in Lisburn & Castlereagh travelled outside of Lisburn & Castlereagh for employment. The authority’s self-containment rate (i.e. share of residents also working within Lisburn & Castlereagh) was relatively low, at 49.4%⁹. The worker outflow in 2011 equated to 30,620, with the largest flows to Belfast (22,630) (73.9% of all out-commuters), and much smaller flows to Antrim and Newtownabbey (2,470) and Armagh City, Banbridge and Craigavon (2,080)¹⁰.
- 3.7 At the same time, 22,780 workers commuted into Lisburn & Castlereagh for work in 2011, with the largest flows originating in the adjoining authorities of Belfast (7,700), Armagh City, Banbridge and Craigavon (4,920) and Ards and North Down (4,270)¹¹.
- 3.8 This indicates that Lisburn & Castlereagh is a net exporter of labour, with a net outflow of around 7,840 workers – equivalent to around 14.9% of the total workplace population within the LGD.

Figure 3.2 Travel-to-work flows



Source: ONS (2011) / Lichfields analysis

⁹ ONS Census (2011)
¹⁰ ONS Census (2011)
¹¹ ONS Census (2011)

Travel-to-Work Areas

- 3.9 The Office for National Statistics (ONS) criteria for defining Travel-to-Work Areas (TTWAs) is that generally at least 75% of an area's resident workforce is employed in the area and at least 75% of the people who work in the area also live in the area. The area must also have a working population of at least 3,500. Based on the 2011 Census, Lisburn & Castlereagh is included within the Belfast TTWA.¹² This confirms the strong functional relationship between Lisburn & Castlereagh and Belfast.
- 3.10 In addition, as noted in the LCCC Housing Growth Study (2019), there are significant migration flows from Belfast to the surrounding area, including Lisburn & Castlereagh. In particular, people working in Belfast tend to move by a distance which still enables commuting to an existing place of employment. In connection with this, Lisburn & Castlereagh is identified as part of the Core Belfast Local Housing Market Area. These trends further highlight the importance of the relationship between Lisburn & Castlereagh and Belfast.

Demographic Overview

Population

- 3.11 The resident population in Lisburn & Castlereagh in 2017 amounted to 142,600 people and had increased by 10.4% between 2007 and 2017. This level of population increase was higher than in Northern Ireland (6.2%) and the UK (7.7%) over the same period¹³.
- 3.12 In 2017, the 89,600 residents of Lisburn & Castlereagh aged 16 to 64 formed 62.8% of the population, which was similar to the proportion for Northern Ireland (62.7%) and the UK (62.9%)¹⁴. However, the level of growth for this cohort of the population has been higher for Lisburn & Castlereagh than the regional and national average. The number of working age people (aged 16-64 years) grew by 6.7% in Lisburn & Castlereagh between 2007 and 2017, compared to an increase of 3.0% in Northern Ireland and an increase of 4.1% in the UK as a whole¹⁵.
- 3.13 The age profile of the population of Lisburn & Castlereagh is slightly older than that of Northern Ireland but younger than the UK average. In 2017, a total of 17.2% of Lisburn & Castlereagh residents were aged 65 and older, compared to 16.2% in Northern Ireland and 18.2% in the UK.

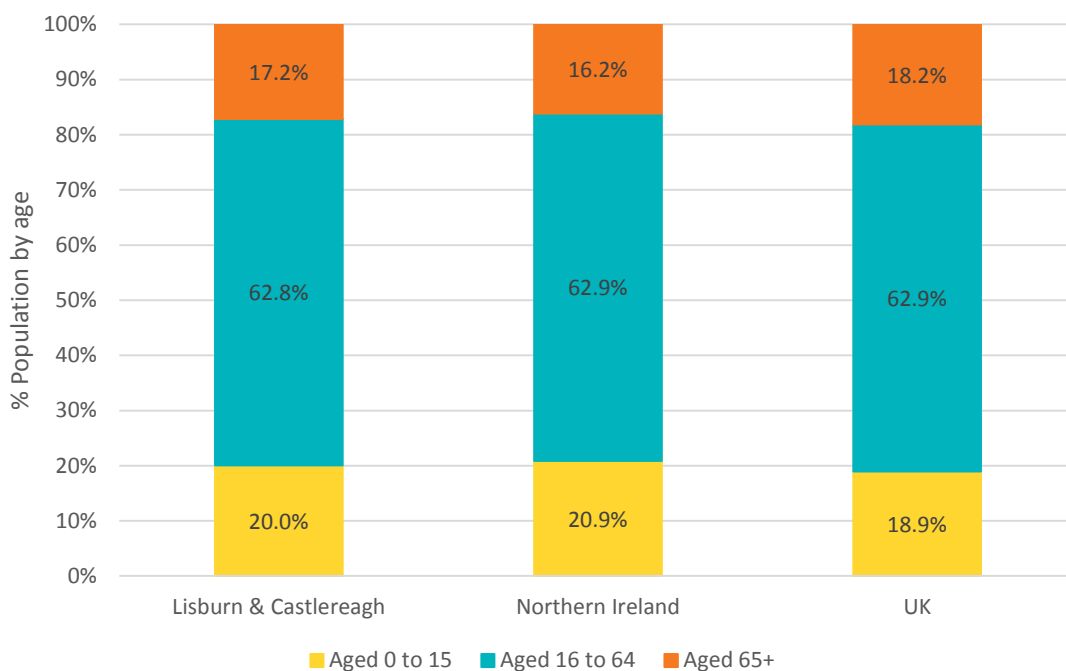
¹² ONS, Travel-to-work Area analysis in Northern Ireland (2011)

¹³ NISRA, Resident population estimates mid-2001 to mid-2017 (2017)

¹⁴ NISRA, Resident population estimates mid-2001 to mid-2017 (2017)

¹⁵ NISRA, Resident population estimates mid-2001 to mid-2017 (2017)

Figure 3.3 Age structure breakdown



Source: NISRA (2017) / Nomis (2017) / Lichfields analysis

Economic Overview

Economic Activity

- 3.14 The economic activity level amongst residents of Lisburn & Castlereagh aged 16 to 64 between January 2017 and December 2017 was 77.7%; this was higher than the rate for Northern Ireland (72.4%)¹⁶ but lower than that for the UK (78.2%)¹⁷.

Self-employment

- 3.15 In 2017, self-employment made up 14.4% of all employment for residents aged 16 to 64 in Lisburn & Castlereagh¹⁸, which is similar to the Northern Ireland and UK averages (both 14.2%).

Claimant unemployment

- 3.16 Compared to the average proportion of residents aged 16 to 64 claiming out-of-work benefits in Northern Ireland (2.4%) and the UK (2.3%), the claimant rate is lower in Lisburn & Castlereagh (1.4%) based on the latest 2018 NISRA data.

¹⁶ NISRA, Labour Force Survey: Labour market structure by local government district (2017)

¹⁷ ONS Annual Population Survey (2017)

¹⁸ NISRA, Labour Force Survey (2017)

Educational attainment

- 3.17 In 2017, a total of 40.9% of residents aged 16 to 64 were qualified to NVQ level 4+ (e.g. degree level or above)¹⁹. This rate was higher than that for Northern Ireland (32.4%)²⁰ and the UK average (38.4%).
- 3.18 The proportion of the working-age population within Lisburn & Castlereagh with no formal qualifications (9.7%) in 2017 was significantly lower than the rate recorded for Northern Ireland (16.5%)²¹ but higher than the UK average (8%)²².

Occupations

- 3.19 In 2017, a higher share of the labour force in Lisburn & Castlereagh was employed in higher skilled occupations (managers/directors/senior officials, professional occupations and associate professional and technical) (42.7%) than in Northern Ireland (36.2%)²³ but lower than that in the UK (45.3%).
- 3.20 The proportion of the workforce in lower skilled jobs (elementary occupations) was lower in Lisburn & Castlereagh (9.2%), compared to 10.7% in Northern Ireland and 10.5% in the UK.

Earnings

- 3.21 Median full time gross weekly earnings for Lisburn & Castlereagh residents were £540 in 2017. This is 8% higher than the Northern Ireland average (£500) and 1.8% lower than in the UK (£550).
- 3.22 Lisburn & Castlereagh’s gross weekly workplace earnings, i.e. for all people working in Lisburn & Castlereagh (£488) were 2.4% lower than the Northern Ireland average (£500) and 11.3% lower than that for the UK (£550).

Table 3.1 Median gross weekly earnings: full time workers (2017)

	Lisburn & Castlereagh	Northern Ireland	UK
Median Gross Weekly Earnings by Residence	£540	£500	£550
Median Gross Weekly Earnings by Workplace	£488	£500	£550

Source: NISRA/ONS Annual Survey of Hours and Earnings (2017 provisional)

- 3.23 This indicates that average resident earnings are higher than the workplace jobs in Lisburn & Castlereagh which implies that people commute out of the area for higher paid jobs, many of which are likely to be located in Belfast.

Deprivation

- 3.24 Local levels of deprivation are measured by the Northern Ireland Multiple Deprivation Measure (NIMDM 2017)²⁴. This index uses a range of data to rank areas in seven categories, ranging from

¹⁹ NISRA, Labour Force Survey (2017)

²⁰ NISRA, Labour Force Survey (2017)

²¹ NISRA, Labour Force Survey (2017)

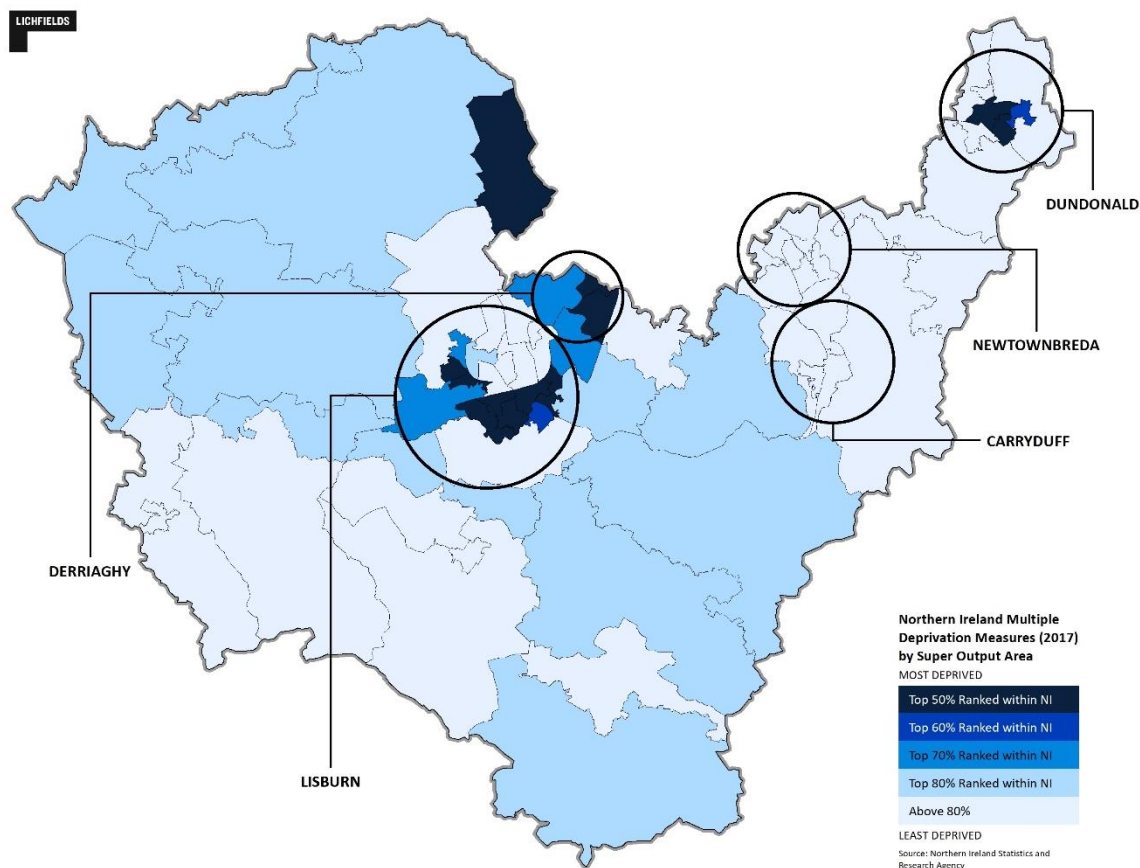
²² ONS Annual Population Survey (2017)

²³ NISRA, Labour Force Survey: Percentage of total employed (16-64) by occupation (2017)

²⁴ NISRA, Northern Ireland Multiple Deprivation Measure (2017)

income to health, which are then combined to create a multiple deprivation score for each area. This analysis is primarily conducted at the Super Output Area (SOA) level. The Lisburn & Castlereagh area comprises 67 SOAs. Figure 3.4 below shows how the SOAs in Lisburn & Castlereagh are ranked in the context of Northern Ireland overall.

Figure 3.4 Multiple Deprivation Measure ranked in Lisburn & Castlereagh by SOAs



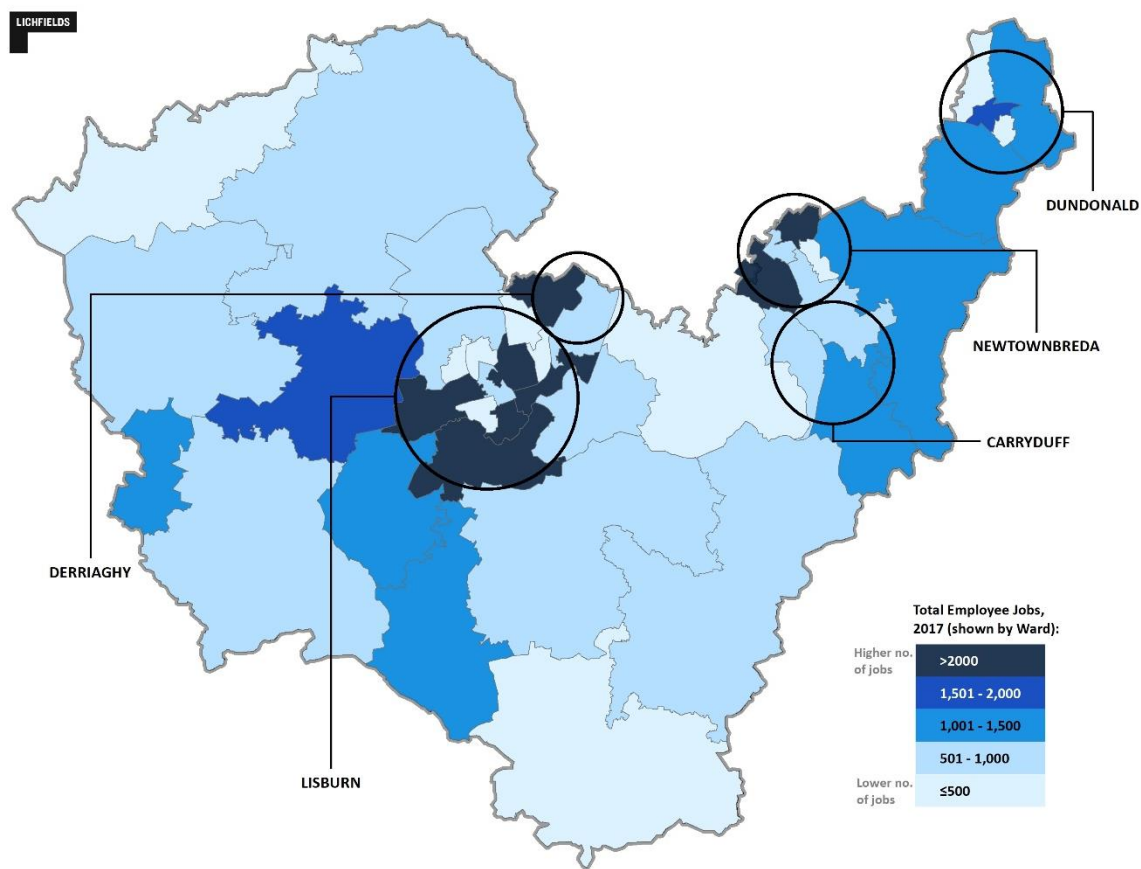
Source: NISRA Northern Ireland Multiple Deprivation Measure (2017)

3.25 Lisburn & Castlereagh is characterised by relatively low levels of deprivation. According to the overall level of deprivation, of the 67 Super Output Areas (SOAs) in Lisburn & Castlereagh, 37% were in the 10% least deprived in Northern Ireland. Just under a fifth of SOAs in Lisburn & Castlereagh were in the 50% most deprived and 6% (4 SOAs) were in the 20% most deprived in Northern Ireland.

Distribution of Employment

3.26 Figure 3.5 illustrates the geographical distribution of jobs across Lisburn & Castlereagh in 2017, indicating the main concentrations were focused on Lisburn City and the towns/areas surrounding Newtownbreda, Dundonald and Carryduff.

Figure 3.5 Employment Distribution: Total Employees (2017)



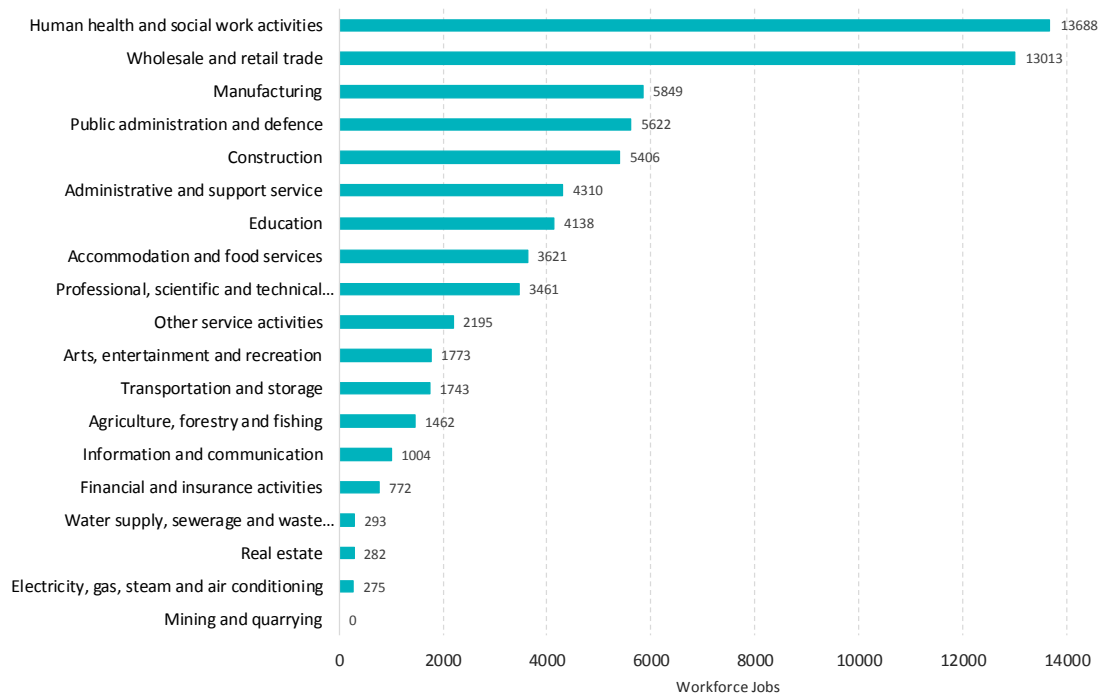
Source: NISRA Number of Employee Jobs by Ward (September 2017) / Lichfields analysis

Sector Profile

3.27 According to Oxford Economics data (published Q3 2018), there were 68,900 workforce jobs located in Lisburn & Castlereagh in 2017.

3.28 As illustrated in Figure 3.6, the largest sector in Lisburn & Castlereagh was human health and social work activities, accounting for 13,690 jobs (19.9% of all jobs), followed by wholesale and retail trade with 13,015 jobs (18.9%) and manufacturing with 5,850 jobs (8.5%).

Figure 3.6 Workforce jobs by sector in Lisburn & Castlereagh (2017)

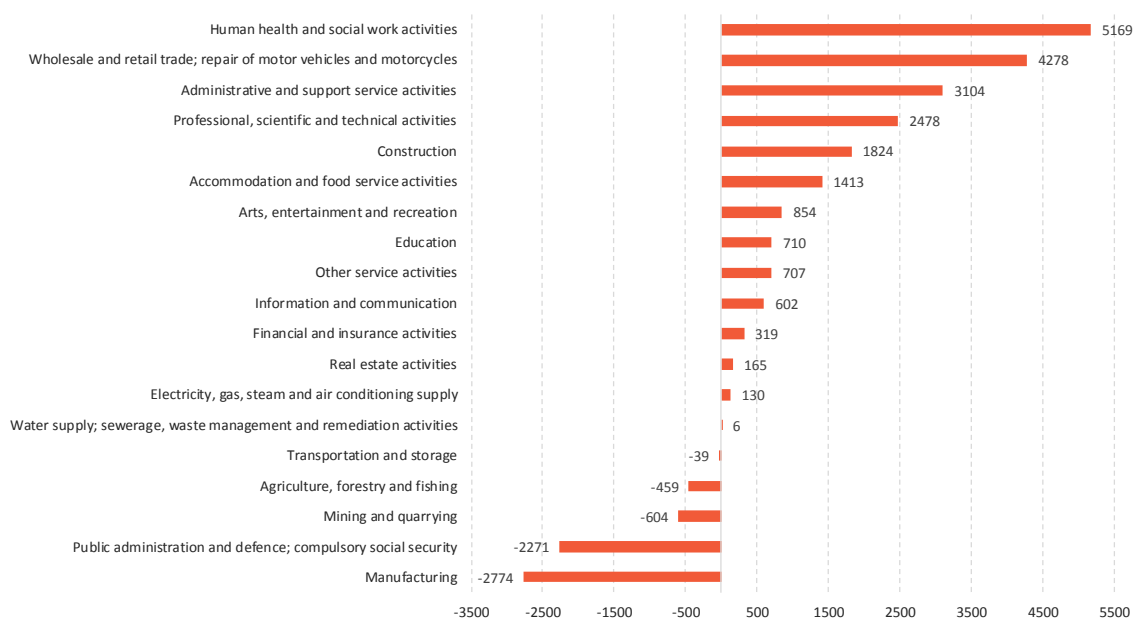


Source: Oxford Economics (Q3 2018) / Lichfields analysis

Employment Past Trends

- 3.29 According to the Oxford Economics data, workforce jobs in Lisburn & Castlereagh increased by 15,610 (29.3%) during the period from 1993 to 2017. This compared to an increase of 212,020 (31.8%) of workforce jobs in Northern Ireland and a slightly lower increase of 7,546,640 (27.4%) of workforce jobs in the UK.
- 3.30 The sector which experienced the largest absolute increase in workforce jobs was human health and social work with an additional 5,170 jobs (an increase of 60.7%). This was followed by the wholesale and retail (4,280 jobs) (49.0%), administrative and support service (3,105 jobs) (257.4%) and professional, scientific and technical activities (2,480 jobs) (252.1%) (Figure 3.7).
- 3.31 By comparison, several sectors experienced a reduction in jobs. The sector that experienced the largest overall decline include manufacturing with a loss of 2,775 jobs (a reduction of 32.2%). The other sectors which experienced a decline in workforce jobs were public administration and defence (-2,270 jobs) (-28.8%), mining and quarrying (-605 jobs) (-100.0%) and agriculture, forestry and fishing (-460 jobs) (-23.9%).

Figure 3.7 Total absolute change in workforce job by sector in Lisburn & Castlereagh 1993-2017



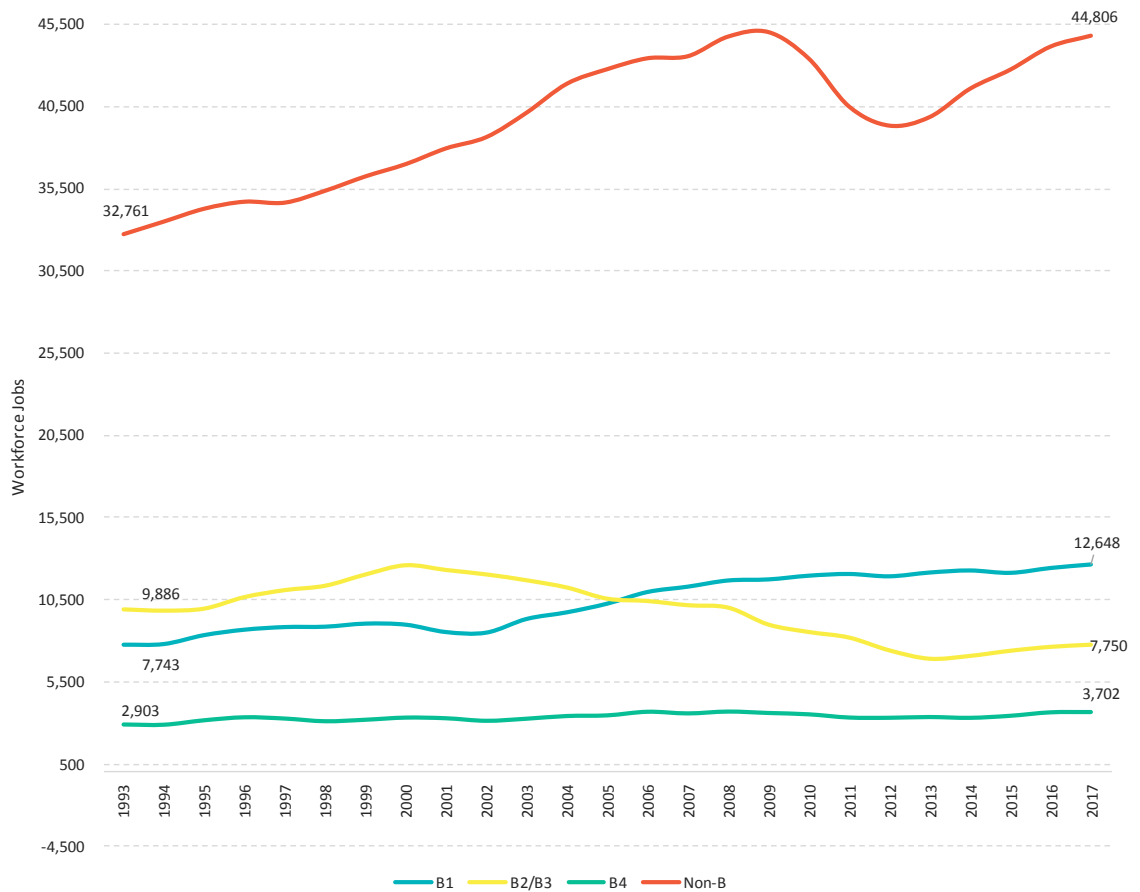
Source: Oxford Economics / Lichfields analysis

B Class Job Change

3.32 Trends in employment can be translated into equivalent land use categories by mapping across industrial sectors to use classes. As shown in Figure 3.8, this indicates that total job growth in Lisburn & Castlereagh between 1993 and 2017 was associated mainly with non-B class sectors. The number of B class jobs increased by 17.4%, whilst the number of non-B class jobs increased by 36.8%. The proportion of total jobs in Lisburn & Castlereagh within the B use class sectors reduced from 38.5% to 35.0% during this period.

3.33 However, there is wide variation between the changes that occurred in each of the different B class sectors. Jobs in the B1 sectors increased by 63.3% from 1993 to 2017, and warehouse/distribution jobs (B4) increased by 27.5%. Meanwhile, industrial jobs (B2/B3) decreased by 21.6%.

Figure 3.8 Total workforce and B class job change in Lisburn & Castlereagh 1993-2017



Source: Oxford Economics (Q3 2018) / Lichfields analysis

Summary

3.34 The key features of Lisburn & Castlereagh's economic context are summarised as follows:

- 1 The key transport links within Lisburn & Castlereagh include the M1, the A1 and A3 in the Lisburn area, the A24 and A20 in the former Castlereagh area and the Belfast/Dublin railway located in Lisburn City. The road links to Belfast are crucial, given the strong economic connections with the regional city.

Lisburn & Castlereagh has a strong functional economic relationship with Belfast, as evidenced by high levels of out-commuting to Belfast City and a self-containment rate of 49.4%. At the same time, Lisburn & Castlereagh remains economically important to the region with 22,780 people commuting into the area.

- 2 The resident population in Lisburn & Castlereagh increased by 10.4% between 2007 and 2017 – a higher level of growth than both Northern Ireland and the UK. Lisburn & Castlereagh has a higher proportion of working age residents (62.7%) than the Northern Ireland average.
- 3 Lisburn & Castlereagh has relatively high economic activity rates, a low unemployment rate and similar levels of self-employment when compared to Northern Ireland and the UK.
- 4 The population of Lisburn & Castlereagh is well qualified, which in part explains a higher share of residents employed in professional occupations compared to Northern Ireland and the UK. However, gross average earnings for residents are higher than for workplace jobs in Lisburn & Castlereagh, indicating that to some degree people commute out from Lisburn & Castlereagh for higher paid jobs (mainly to Belfast).
- 5 Levels of deprivation are relatively low in Lisburn & Castlereagh, with only one Super Output Area (Old Warren) ranking in the top most 100 deprived Super Output Areas in Northern Ireland.
- 6 The largest sector in Lisburn & Castlereagh in 2017 was human health and social work activities, accounting for 13,690 jobs (19.9% of all jobs), followed by wholesale and retail trade with 13,015 jobs (18.9%).
- 7 Over the period 1993-2017, the majority of employment growth in Lisburn & Castlereagh was associated with non B-class sectors. The proportion of total jobs within the B use class sectors reduced from 38.5% to 35.0% during this period.
- 8 The number of jobs in the class B sectors increased by 17.4% between 1993 and 2017. However, this overall figure masks considerable variation between each of the sectors. There were increases in the number of jobs in the B1 sectors (63.3%) and B4 sectors (27.5%) but decreases in the B2/B3 sectors (21.6%).

4.0 Existing Employment Sites and Development Trends

4.1 This section provides an overview of the current stock and distribution of registered B class employment space in Lisburn & Castlereagh. It then provides an overview of the distribution and types of uses at the main employment areas across the LGD, as defined by extant statutory development plans. It also provides an analysis of past development trends in relation to B class employment uses.

Existing Stock and Distribution of Employment Floorspace

4.2 This analysis applies data from the Land and Property Services (LPS) Non-Domestic Valuation List relating to commercial units by category.²⁵ The classification system employed on non-domestic property does not correspond to the Northern Ireland Use Classes Order 2015. Therefore, for the purposes of this exercise, the classifications that most closely align with the main types of B class employment use have been used having regard to the LPS “Pointer technical specification” guidance document²⁶. These classifications are as follows:

- 1 “ND_Office” - Commercial Office - banks, post offices, offices;
- 2 “ND_Industry” - Industry (including factories, quarries); and
- 3 “ND_Indust_Other” - Miscellaneous Industry.

4.3 As noted in Table 4.1, there are no premises within Lisburn and Castlereagh that are classified as “Miscellaneous Industry”. In total, there are 365 premises within Lisburn & Castlereagh that can be classified generally as B Class employment uses. A total of 145 of these premises are classified as “Industrial” and 220 are classified as “Office”.

Table 4.1 Industrial and office premises registered in Lisburn and Castlereagh

Type	No. properties	% of total employment premises
ND_Office	220	60.3%
ND_Industry	145	39.7%
ND_Indust_Other	0	0%
Total	365	100.0%

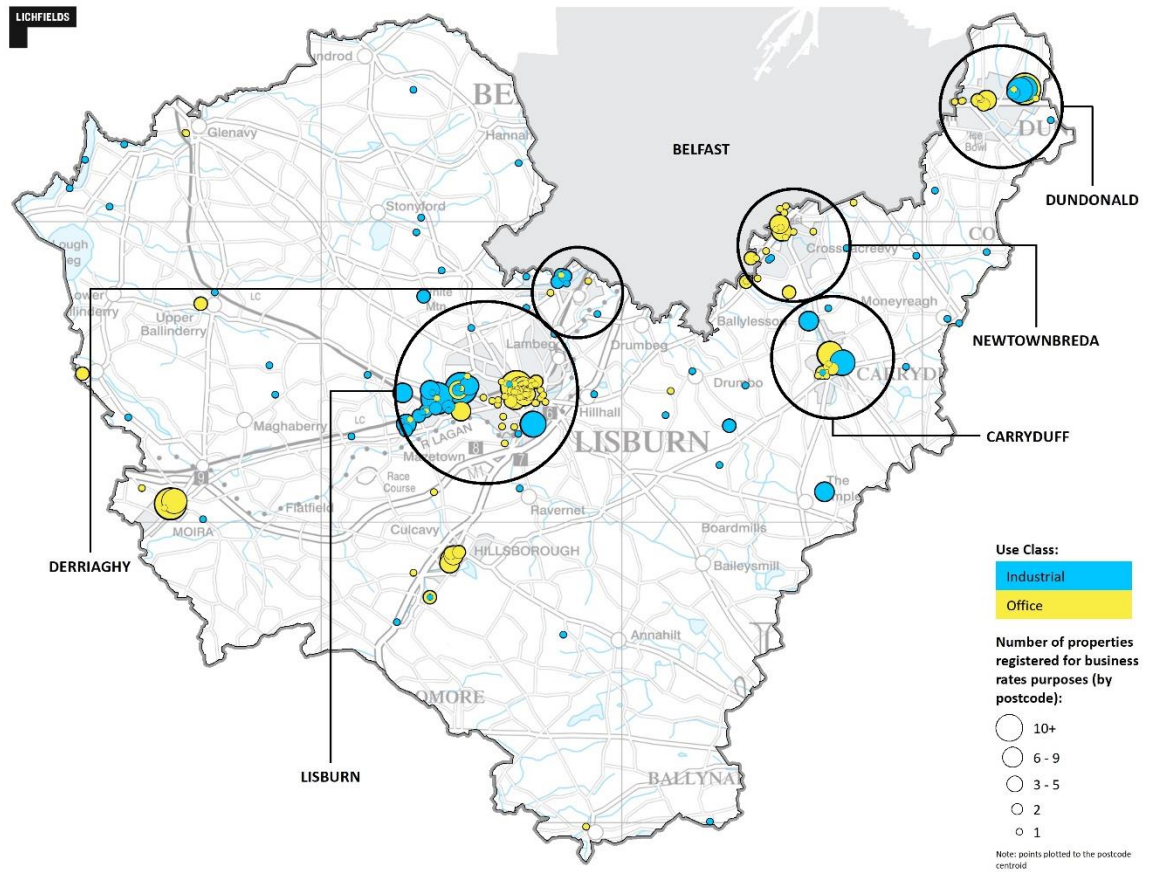
Source: LPS Non-Domestic Valuation List (provided by LCCC) / Lichfields analysis

4.4 The spatial distribution of B class employment units in Lisburn & Castlereagh is shown in Figure 4.1. This distribution has been mapped using postcode data for each property to illustrate the approximate location.

²⁵ The rating list is based upon the rateable value of properties as at 1 April 2013. LCCC provided Lichfields with this data, which indicates the number of different commercial units by postcode within Lisburn & Castlereagh.

²⁶ <https://www.nidirect.gov.uk/sites/default/files/publications/pointer-specification-april-2017.pdf>

Figure 4.1 Industrial and office premises registered in Lisburn & Castlereagh

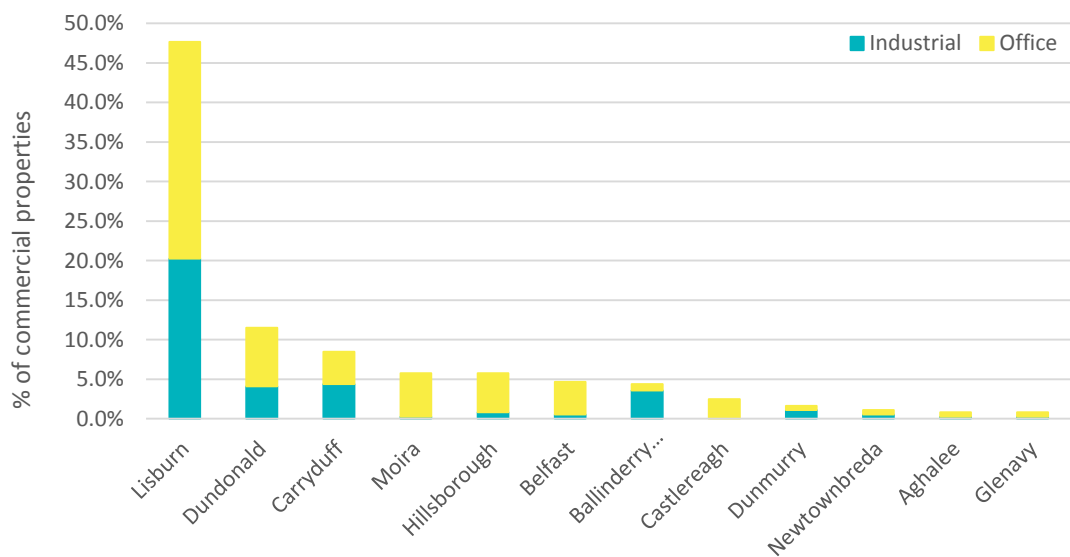


Source: LPS Non-Domestic Valuation List / Lichfields analysis

4.5

Figure 4.2 presents the distribution of commercial properties by locality.

Figure 4.2 Commercial premises by locality (% of commercial properties)



Source: LPS Non-Domestic Valuation List / Lichfields analysis

- 4.6 This analysis demonstrates that Lisburn City has the highest concentration of all commercial units (47.7%), including offices (27.4%) and industrial units (20.3%). Lisburn City's share of commercial units includes industrial estates at Blaris, Lissue East, Lissue West and Knockmore.
- 4.7 Other significant concentrations are located within Dundonald (11.5%, including Inspire Business Park), Carryduff (8.5%, including Lowes Industrial Estate), Moira (5.8%) and Hillsborough (5.8%).
- 4.8 There is also a pattern of clustering of industrial premises along key transport routes. This is particularly clear in the case of the pronounced clustering to the north of A3 (Moira Road) and adjacent to the M1 (Blaris Industrial Estate) in Lisburn. Smaller industrial clusters occur to the north of the A20 (Upper Newtownards Road) in Dundonald and to the east of Carryduff, adjacent to the A7 (Saintfield Road). However, there are also a number of dispersed industrial units in rural areas.
- 4.9 It is important to recognise that this analysis is based on the total number of units rather than the total quantum of floorspace (floorspace data is not available).

Main Employment Sites

- 4.10 Table 4.2 overleaf lists the 30 main existing employment areas in Lisburn & Castlereagh (which are based on previous and extant statutory development plans).

Table 4.2 Overview of main employment sites

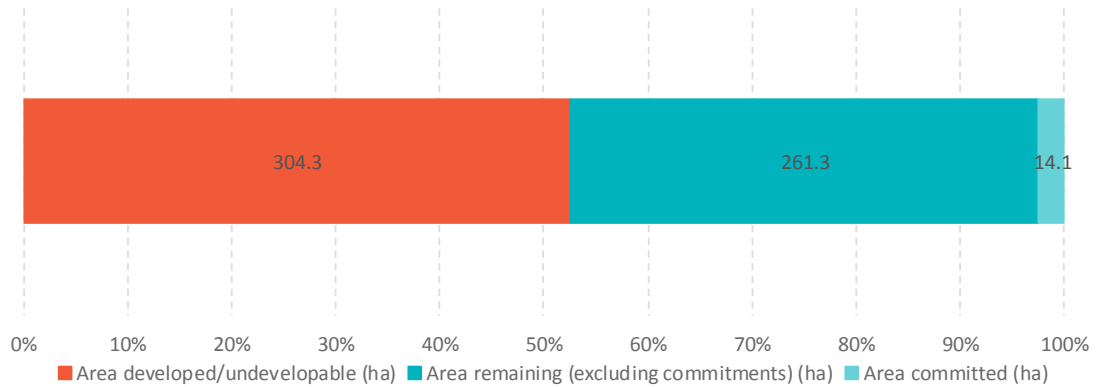
Site Name	Settlement	Total Area Zoned (ha)	Developed / Undevelopable Land (ha)	Area Remaining (ha)
Land at Upper Newtownards/Carrowreagh	Dundonald	34.90	11.82	23.08
Newtownbreda Factory Estate Cedarhurst Road	Castlereagh Greater Urban Area	1.20	1.20	0.00
Cedarhill Industrial Estate, Beechill Road	Castlereagh Greater Urban Area	2.02	1.64	0.38
Cyril Johnstone & Co, Ballynahinch Road	Carryduff	2.19	2.19	0.00
Carryduff Business Park, Comber Road	Carryduff	5.13	0.04	0.09
Saintfield Road	Carryduff	3.80	3.33	0.47
Eastbank Road, Carryduff	Carryduff	1.96	0.86	1.10
Edgar Industrial Estate	Carryduff	6.73	5.97	0.76
Maryland Industrial Estate, Crossnacreevy	Castlereagh County	5.58	5.47	0.11
Ballinderry/Knockmore Road	Lisburn City	44.30	26.56	17.74
Blaris Industrial Estate	Lisburn City	25.23	24.46	0.77
Enterprise Crescent, Ballinderry Road	Lisburn City	13.19	13.19	0.00
Ballinderry Road	Lisburn City	7.43	7.43	0.00
Flush Park Industrial Estate, Knockmore Road/Moira Road	Lisburn City	8.47	4.92	3.55
Lissue Industrial Estate	Lisburn City	52.82	49.09	3.73
Coca-Cola Plant, Lissue Road	Lisburn City	18.47	17.3	1.17
Derriaghy Industrial Estate	Lisburn Greater Urban Area	44.54	39.27	5.27
Lands at Glenavy Road, Moira	Lisburn County	24.06	12.26	11.80
Seymour Hill Industrial Estate	Lisburn Greater Urban Area	10.80	6.07	4.73
Ballynahinch Road	Carryduff	11.74	0.45	11.29
Lands at Comber Road	Carryduff	5.55	0.29	5.26
Land North West of Gobraña Road	Glenavy	6.27	0.00	6.27
Lands SE of Millmount/Comber Road	Dundonald	9.27	0.71	8.56
Knockmore/Lissue Road	Glenavy	3.09	0.00	3.09
Lissue Road	Lisburn County	14.34	3.48	10.86
Knockbracken Healthcare Park, Saintfield Road	Castlereagh Greater Urban Area	85.54	41.53	44.01
Blaris Road	Lisburn City	119.47	14.49	104.98
Barbour Threads Mixed Use	Lisburn City	5.53	2.7	2.83
Land South of Woodvale Development, Rathfriland Road	Dromara	3.54	0.26	3.28
Forster Green, Saintfield Road	Castlereagh Greater Urban Area	2.54	2.34	0.20
Total		579.7	304.3	275.4

Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

Note: figures may not sum due to rounding

4.11 The total supply of land at these sites (including all use classes) is 579.7ha. As illustrated in Figure 4.3, a total of 304.3ha of this supply is already developed for employment or non-employment use, or comprises undevelopable land. A total of 275.4ha remains available for development, which includes 14.1 ha across a number of locations with extant planning permission for employment uses.

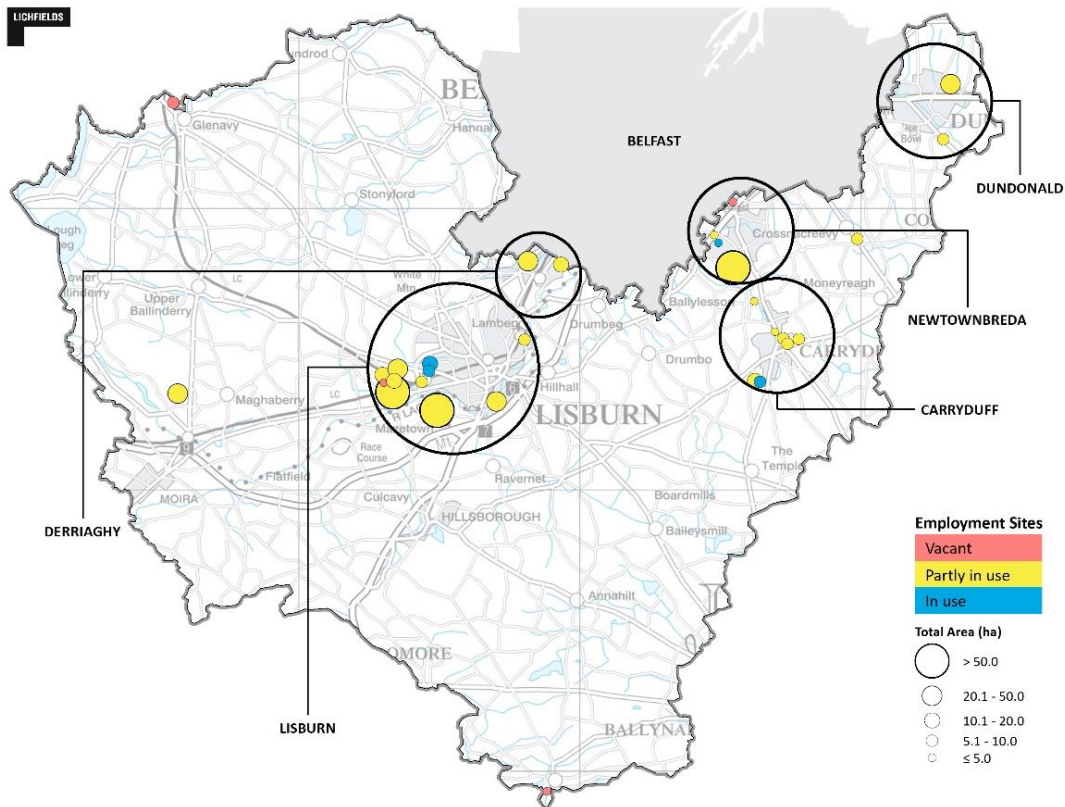
Figure 4.3 Employment Land Supply by Development Status



Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

4.12 The majority of these employment sites are partly in use, as illustrated in Figure 4.4.

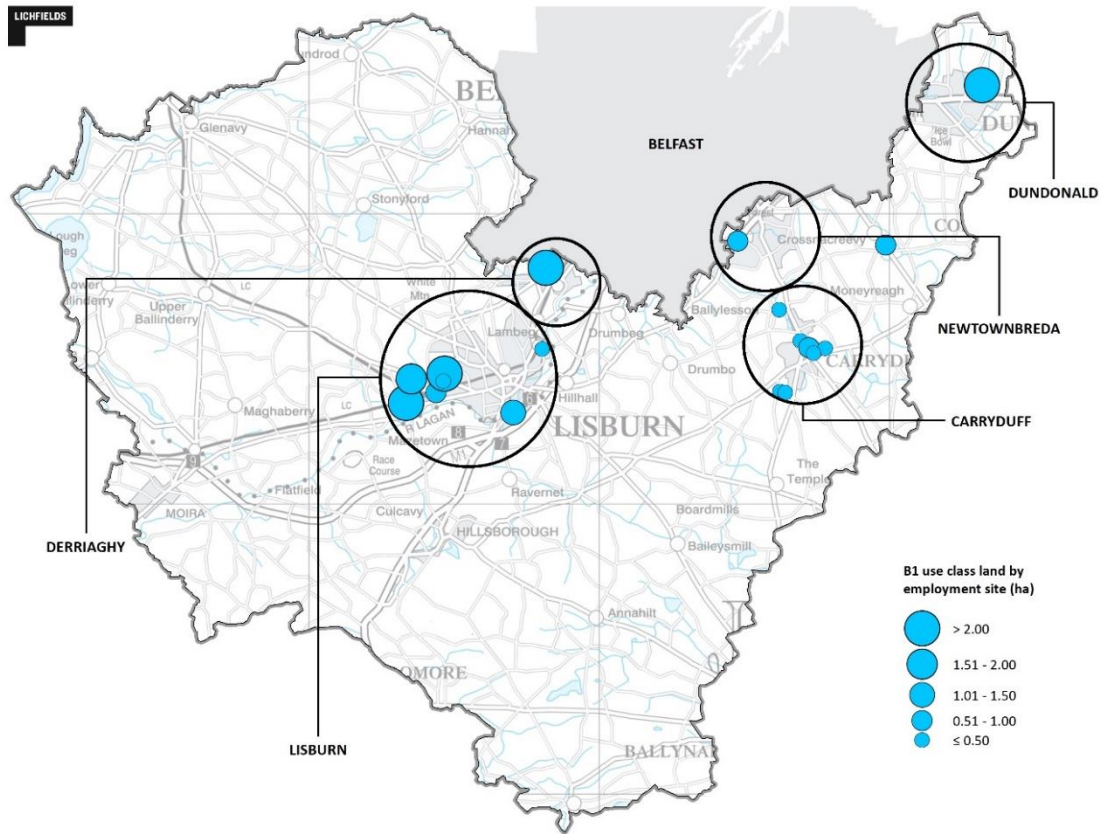
Figure 4.4 Main Employment Sites by Development Status



Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

4.13 Figure 4.5 illustrates the distribution of existing B1 (business) uses across the main employment sites.

Figure 4.5 Distribution of B1 uses at main employment sites

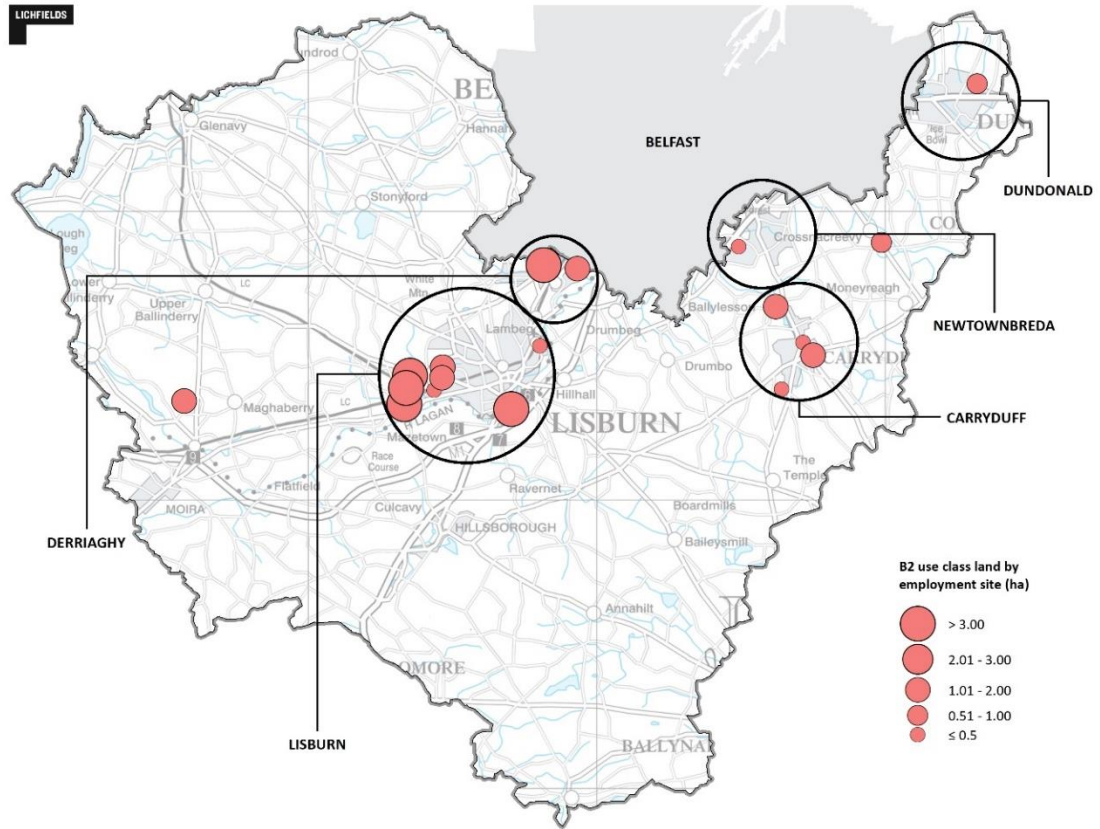


Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

4.14 Existing B1 uses are mainly clustered in Lisburn, Carryduff, Derriaghy and Dundonald. In terms of B1 use sites by ha the largest sites (2.0ha or greater) are clustered around Lisburn.

4.15 Figure 4.6 illustrates the distribution of existing B2 (light industrial) uses across the main employment sites.

Figure 4.6 Distribution of B2 uses at main employment sites



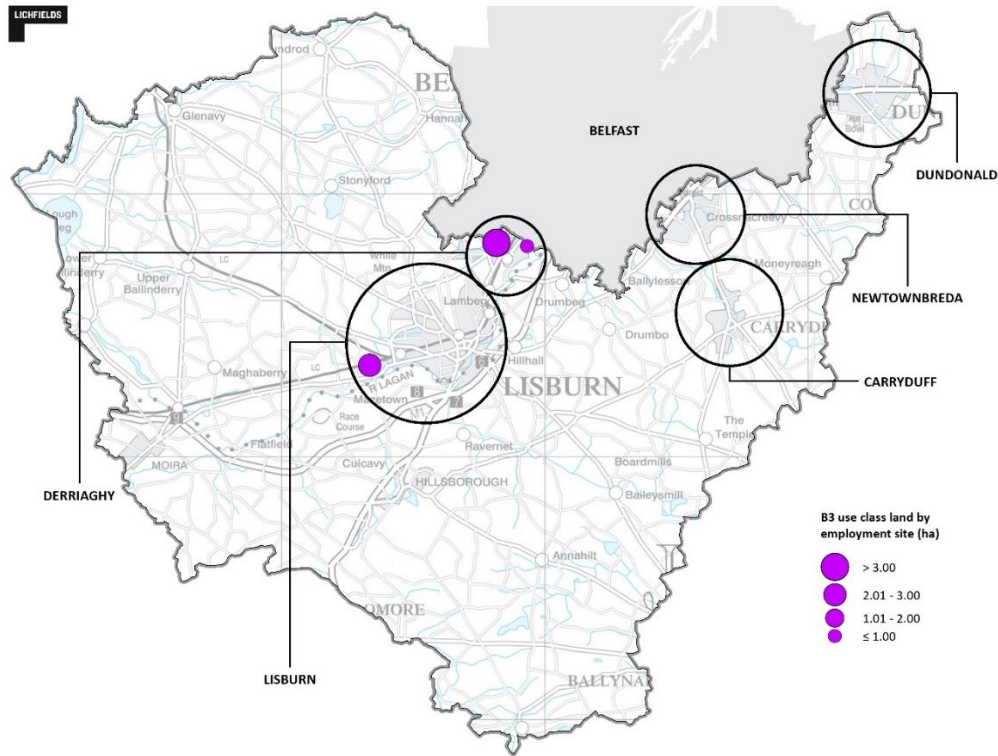
Source: LCCC Employment Land Monitoring Report (2015-2019) / Lichfields analysis

4.16 Sites with existing B2 uses are distributed mainly in Lisburn, Carryduff, Derrriaghy and Dundonald. Sites with 4.0ha or more used for B2 uses are found within Carryduff and Dundonald.

4.17

Figure 4.7 illustrates the distribution of existing B3 (general industrial) uses across the main employment sites.

Figure 4.7 Distribution of B3 uses at main employment sites



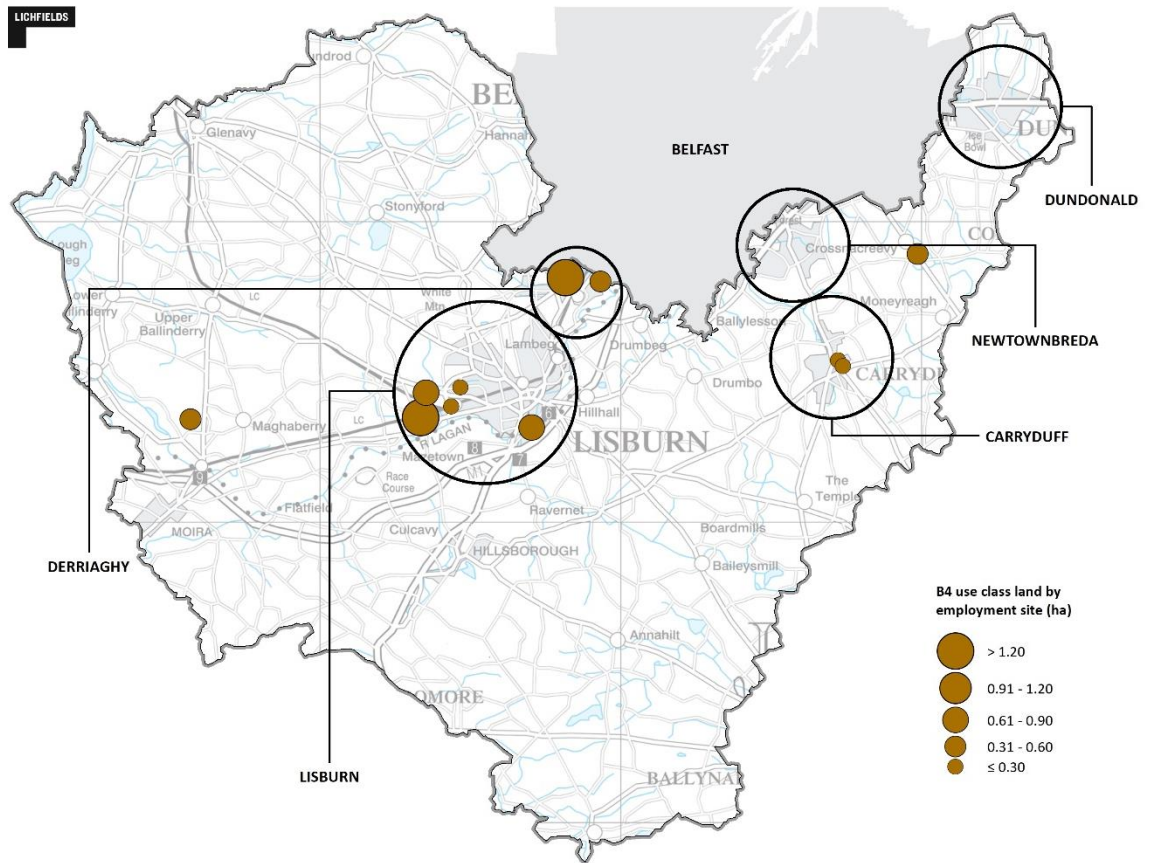
Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

4.18

There are only 3 sites with existing B3 uses, 2 of which are in Derriaghly, close to Belfast, and one is south-west of Lisburn.

4.19 Figure 4.8 illustrates the distribution of existing B4 (storage or distribution) uses across the main employment sites.

Figure 4.8 Distribution of B4 uses at main employment sites



Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

4.20 Existing B4 uses are mainly clustered to the south of Lisburn and in Derriagh, within additional B4 uses in Carryduff, Crossnacreevy and to the north of Moira.

Components of land supply

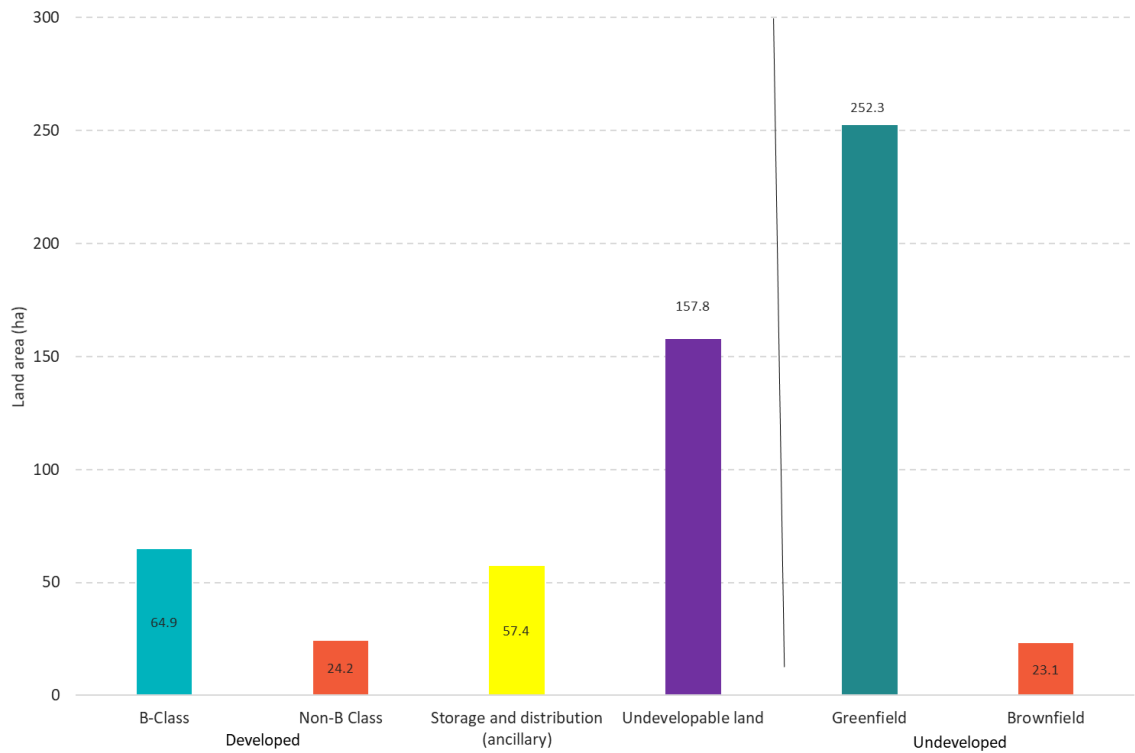
4.21 Figure 4.9 illustrates the breakdown of developed and undeveloped land by use class. In terms of developed land, this is categorised by B-class use, non-B class use, ancillary uses such as yards and storage sheds (which fall outside the use classes but could equate to a form of storage and distribution use overall). Of the developed land:

- 1 B class uses account for 64.9ha;
- 2 Ancillary storage and vacant units with no assigned use class account for 57.4ha;
- 3 Non-B uses account for 24.2ha; and
- 4 Additional land areas which have identified as undevelopable land (e.g. roads, floodplain, landscaped areas and parking/circulation space) accounts for 157.8ha.

4.22 With regards to the remaining land, this includes both greenfield and brownfield. The largest component, totalling 252.3ha is greenfield, which includes approximately 50ha at West

Lisburn/Blaris which is proposed for reallocation to mixed-use through the LDP. In addition, there is 23.1ha of undeveloped brownfield land. Overall, the total remaining land is 275.4ha.

Figure 4.9 Breakdown of developed and undeveloped sites



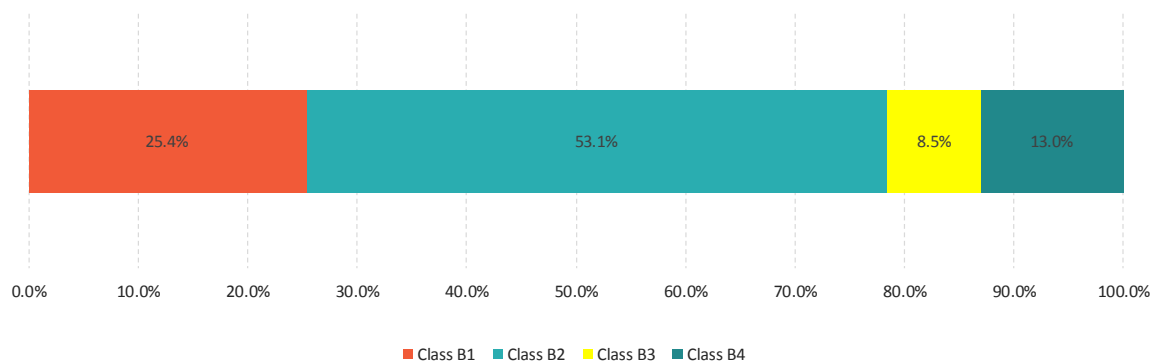
Source: LCCC Employment Land Monitor (2015-19) / Lichfields analysis

4.23

In terms of the 64.9ha of developed B-class land, the LCCC Employment Land Monitor (2015-19) indicates that this is broken down as follows (Figure 4.10):

- a B1: 16.5ha (25.4%);
- b B2: 34.4ha (49.2%);
- c B3: 5.5ha (9.0%); and
- d B4: 8.5ha (13.7%).

Figure 4.10 Breakdown of developed employment land: B use classes

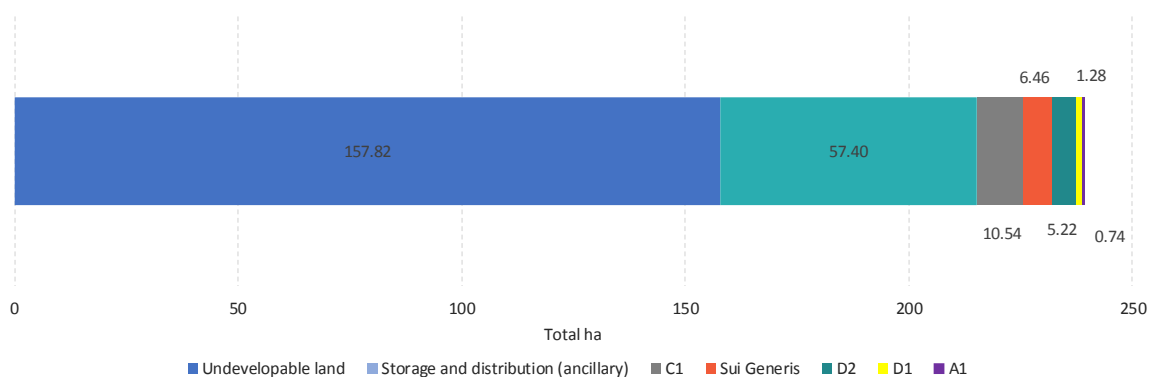


Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

4.24 This analysis demonstrates that B1 and B2 uses dominate the supply of existing employment land at the proposed zonings. B2 uses account for 53.1% of land in use class B, and B1 uses account for 25.4% of this land.

4.25 The 239.5ha of land that is not in the B use classes includes areas of land which have been identified as undevelopable and a variety of other uses as shown in Figure 4.11. A total of 157.8ha comprises areas of undevelopable land, which includes roads, floodplain, landscaped areas and parking/circulation space. C1 (residential) uses account for 10.54ha, followed by sui generis (6.46ha) and D2 (assembly and leisure), accounting for 5.22ha.

Figure 4.11 Breakdown of developed employment land



Source: LCCC Employment Monitor Review (2015-2019) / Lichfields analysis

Development and Loss of Employment Land

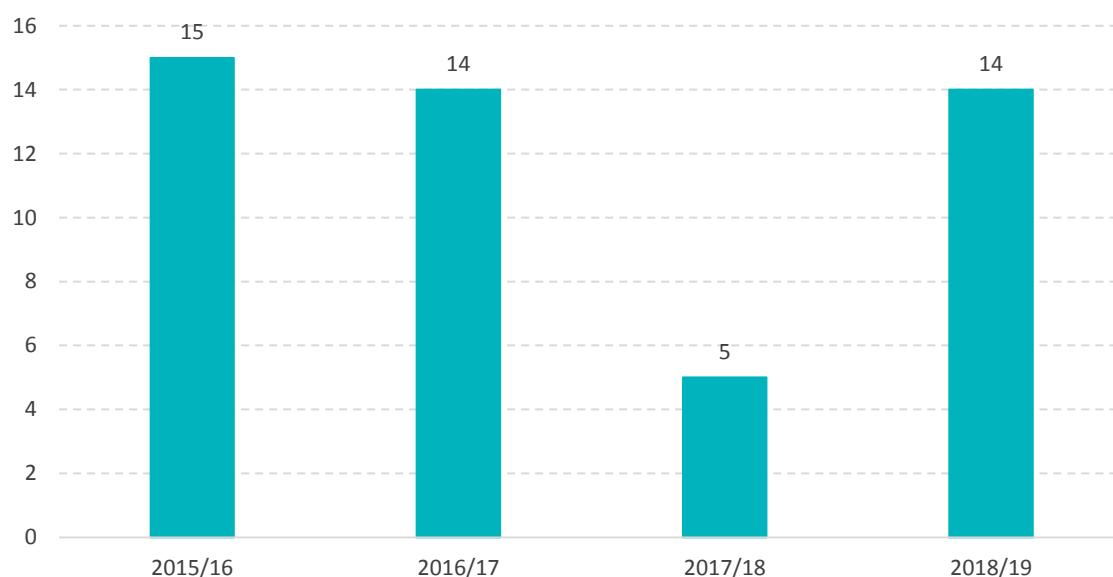
4.26 This section reviews the current supply of employment (B use class) land. It is based upon data set out in the LCCC Employment Land Monitor (2015-19). This information comprises a schedule of planning permissions for “employment and industrial” uses determined from 2015 to 2019 relating to:

- 1 Commercial uses (B use classes);
- 2 Industrial uses (B use classes);
- 3 Mixed Use (B use classes); and
- 4 Civic Use (B use classes).

Planning Permissions

4.27 Figure 4.12 illustrates the annual number of planning permissions granted relating to “employment and industrial” uses between 2015 and 2019. On average, 12 permissions were granted per annum for employment and industrial uses between 2015 and 2019.

Figure 4.12 Planning permissions for “employment and industrial” uses (2015-2019)



Source: LCCC Employment Land Monitor (2015-19) / Lichfields analysis

Past Completions

4.28 Table 4.3 summarises the completions data for employment and industrial uses provided in the LCCC Employment Monitor (2015-2019) but excludes change of use and extensions.

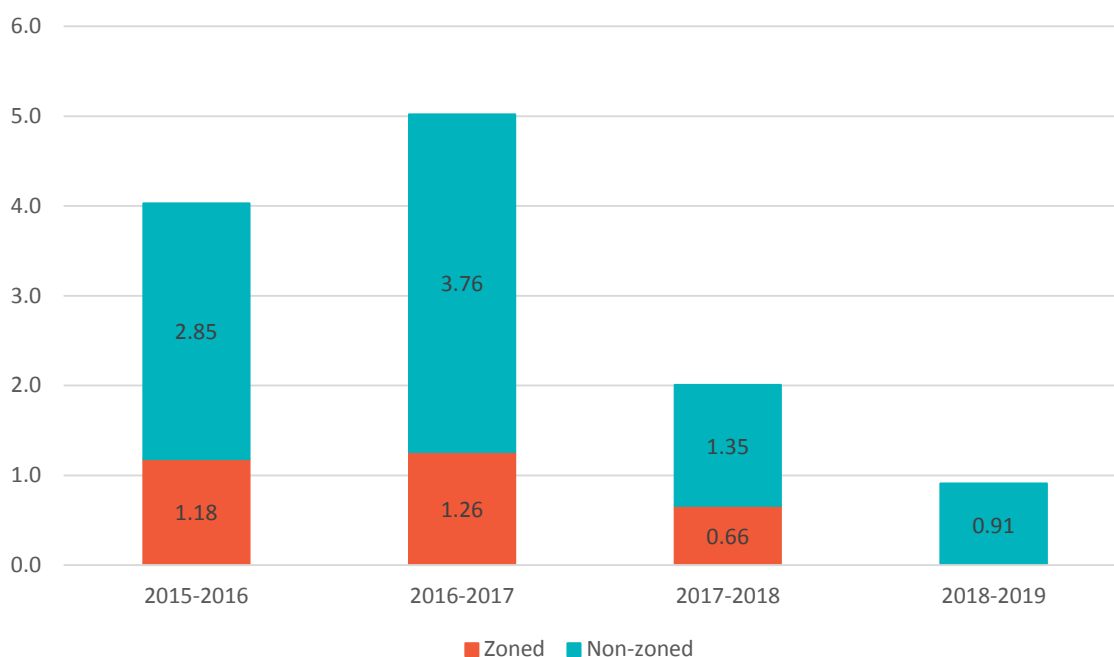
Table 4.3 Land developed on zoned and non-zoned sites (ha)

	2015/16	2016/17	2017/18	2018/19	Total 2015-19
Zoned sites	1.18	1.26	0.66	0	3.10
Non-zoned sites	2.85	3.76	1.35	0.9	8.87
Total completions	4.03	5.02	2.01	0.9	11.97

Source: LCCC Employment Land Monitor (2015-19) / Lichfields analysis

4.29 Between 2015 and 2019, a total of 11.97 ha of B class employment land was recorded as developed, equivalent to an average of 2.99ha per annum. Across this monitoring period a total of 3.1ha of B class employment land was developed on zoned sites. In comparison, a total of 8.9ha of B class employment land was developed on non-zoned sites. Therefore, over the monitoring period of 2015-2019 a higher proportion of development occurred on non-zoned sites (Figure 4.13).

Figure 4.13 Total completions on zoned and non-zoned sites (2015-19) (ha)



Source: LCCC Employment Land Monitor (2015-19) / Lichfields analysis

4.30 This data can be further analysed by specific use class. The total employment land developed for the four-year period (2015 to 2019) is shown in Table 4.4 below.

Table 4.4 Total completions broken down by B use class (ha)

B Use Class	2015/16	2016/17	2017/18	2018/19
B1	2.9	0.9	1.0	0.0
B2	0.0	2.5	0.0	0.9
B4	1.2	1.6	1.0	0.0

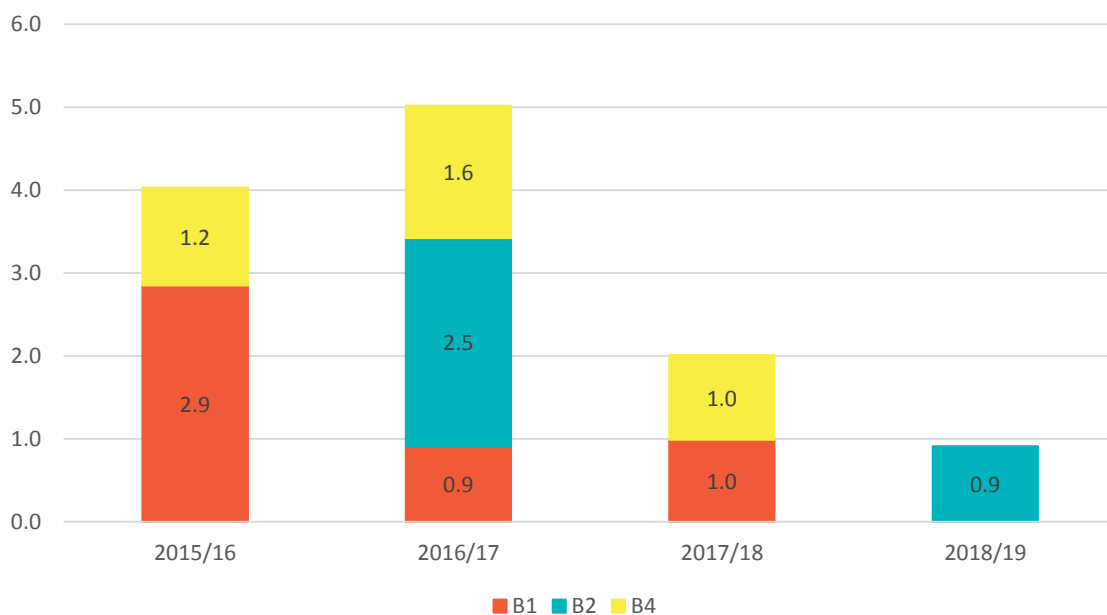
Source: LCCC Monitor Review / Lichfields analysis

Note: Figures may not sum due to rounding

4.31 This analysis shows that, between 2015 and 2019, the highest levels of employment development were in the B1 use classes. A total of 4.8ha of B1 employment space was completed during this period, equivalent to 1.2ha per annum. By contrast, a total of 3.4ha of B2 employment space was completed, equivalent to 0.9ha per annum. A total of 3.8ha of B4 employment space was completed, equivalent to 1.0ha per annum. There were no use class B3 completions during this period. The total employment land developed for the whole period (2015 to 2019) is shown in Figure 4.14.

4.32 Of the 10 proposals that came forward on non-zoned sites, 5 proposals were for B1 uses, 3 were for B2 and 2 were for B4. A total of 5 of these proposals were located in Lisburn, 2 in Moira and the other 3 spread between the settlements of Annahilt, Dundrod and Dromara. Whilst these figures are small, they reflect the general trend towards higher levels of development in the B1 uses and the concentration of employment in the Lisburn area.

Figure 4.14 Completions by B use class (2015-19) (ha)



Source: LCCC Employment Land Monitor (2015-19) / Lichfields analysis

Permitted Losses of B Use Class Employment Space

4.33

A total of 6 proposals were permitted between 2015 and 2019 that sought the reuse or redevelopment of B Class premises for non-B Class activities on existing zoned sites. This resulted in a total loss of 2.0ha of B class floorspace, equivalent to a loss of 0.5ha per annum.

Table 4.5 Total Loss of B Class Use Land Submitted in 2015-2018

Year	Site	Change of Use	Area lost to alternative use (ha)
2015	Unit 1, 127 Ballynahinch Road, Carryduff	Hairdressing Salon/Millinery	0.9
2016	Unit 3 McKibbin House, Eastban Road, Carryduff	Café	0.01
2017	140m south west of 2 Ballyoran Lane	Community Gymnastics Club	0.12
2018	Land at City Business Park	Petrol filling station	0.3
2018	Land at City Business Park	Restaurant with car parking	0.5
2018	11 Altona Road, Lisburn	Play and adventure centre	0.2
Total			2.0

Source: LCCC Employment Land Monitor (2015-19)

Note: figures may not sum due to rounding

Summary

- 1 The current supply of employment land indicated by the LPS data shows an approx. 60:40 split of offices and industrial/distribution uses in Lisburn & Castlereagh, with Lisburn City accommodating almost half of all commercial premises (47.7%).
- 2 The total supply of land at the 30 main employment sites (developed and undeveloped) in Lisburn & Castlereagh is 579.7 ha. Land already in B class use accounts for 64.9ha, equivalent to 11.2% of the total supply, non-B class uses account for 24.2ha or 4.2% of the total supply.
- 3 Of the land in B class uses, B2 class uses account for over half (53.1%), and B1 uses account for 25.4%.
- 4 The area of land remaining to be developed is 275.4ha, the vast majority (91.6%) of which is greenfield.
- 5 A total of 48 planning applications were approved by LCCC relating to “employment and industrial” uses between 2015 and 2019 (an average of 12 planning permissions per year). These relate to a range of uses, including light industrial floorspace, storage, factory and office floorspace.
- 6 Between 2015 and 2019, a total of 11.97ha of B class employment land was developed, equivalent to an average of 2.99ha per annum.
- 7 The highest levels of employment development were in the B1 use classes. A total of 4.8ha of B1 employment space was completed between 2015 and 2019, equivalent to 1.2ha per annum.
- 8 Six proposals for the change of use from B use class to non-B use class were approved between 2015 and 2019 on zoned employment sites, resulting in a loss of 2.0ha of B class floorspace, equivalent to 0.5ha per annum. This suggests there is pressure on some existing industrial estates for redevelopment to non-B uses.

5.0 Market Feedback

- 5.1 Best practice for the preparation of ELRs includes consultation and engagement with local stakeholders to inform the development of policy for employment land. This process helps to identify key economic issues, local viewpoints on current and future economic conditions, which will inform the development of planning policy in order to support the economic growth potential of Lisburn & Castlereagh.
- 5.2 Lichfields was invited by LCCC to an Invest Lisburn & Castlereagh Property Forum event in May 2019, which was attended by 12 regional and local property agents. Lichfields presented the headline employment growth figures for each sector taken from the Oxford Economics forecast, before posing a series of questions regarding expectations of future employment growth and the extent to which the baseline forecasts were considered to reflect their views of future prospects. Comments were also invited in relation to the supply of employment land within the LCCC area.
- 5.3 Following the event, the agents were invited to complete a questionnaire providing further information on local market conditions and issues affecting the need for and supply of employment land. LCCC followed up with attendees after the meeting to make agents aware of the opportunity to engage in this process and to invite further responses.
- 5.4 Comments were recorded at the event, and a total of 4 completed questionnaires were subsequently provided to Lichfields.
- 5.5 Key issues and comments raised at the event and in questionnaire responses included:
- 1 Whilst the local economy is fairly healthy in Lisburn & Castlereagh, there is uncertainty in relation to the national economy and there are also areas for improvement, which indicate that there is a need to identify appropriate employment land in areas of demand in order to support the economy.
 - 2 There are no particular concerns with the existing quantity of employment land but there may be a need to re-focus the supply on locations with good road connectivity – with particular emphasis on the importance of the Belfast to Dublin corridor. Traffic problems and links are key issues that should be taken into account in the zoning of employment land.
 - 3 The distribution, manufacturing, transportation and food sectors are doing well in Lisburn & Castlereagh and should be supported through the provision of appropriate sites; however, it is noted that there has not been much demand for industrial premises.
 - 4 There is market preference for existing properties that are cheaper to refurbish than new builds on undeveloped sites.
 - 5 There is a need to support growth in the service sectors, which can be partly through mixed-use developments.
 - 6 There is support for the proposed Knockmore Link Road, which is considered to offer a key opportunity to open up the Lissue area for larger scale employment opportunities.
- 5.6 A summary of all of the key points raised is included at Appendix 1.

6.0 Future Need for Employment Space

6.1 This section considers the level of future employment growth in Lisburn & Castlereagh over the emerging LDP period (2017-2032). Drawing upon a number of methodologies, based on wider UK best practice in the absence of any specific Northern Ireland guidance, it provides recommendations on the amount of additional employment land that could be required over the plan period.

Methodology

6.2 A number of potential future economic scenarios have been developed to provide a framework for considering future economic growth needs and B class employment space requirements within Lisburn & Castlereagh. These scenarios draw upon:

- 1 Projections of employment growth in the main B class sectors (**labour demand**) derived from economic forecasts produced by Oxford Economics;
- 2 Consideration of **past trends in completions of employment space** based on monitoring data collected by LCCC, and how these trends might change in the future; and
- 3 Estimating future growth of **local labour supply** drawing upon the latest (2016-based) population projections produced by NISRA and used to inform the parallel assessment of housing need within Lisburn & Castlereagh.

6.3 Each of these approaches has limitations, and consideration needs to be given as to how appropriate each is to circumstances in Lisburn & Castlereagh. As such, it is necessary to consider the outputs from each, along with other (qualitative) indicators in order to give a robust view of future employment space needs.

6.4 In order to translate job forecasts into an estimate of potential B class employment space requirements, it is necessary to apply the latest published density figures for employment space, which take account of recent trends in occupancy for the different B class uses. To estimate space requirements, the following average ratios have been applied to job forecasts:

- 1 **B1 Business:** 1 job per 12.5 sqm for general office space (B1);
- 2 **B2 Light Industrial / B3 General Industrial:** 1 job per 45 sqm as an average across B2 and B3 uses; and
- 3 **B4 Storage or Distribution:** 1 job per 65 sqm for B4 uses.

6.5 In the absence of any guidance for Northern Ireland these assumptions are based on the latest Homes & Communities Agency (HCA) guidance on job density ratios produced in 2015²⁷. The guidance takes account of recent trends in terms of changing utilisation of employment space, with the key change being the more efficient use of office floorspace due to the higher frequency of flexible working and hot-desking. This has resulted in a reduction in the amount of floorspace per office worker assumed compared to earlier guidance.

6.6 The following assumptions are applied in each of the following scenarios:

- 1 An allowance of 10% is added to all positive floorspace requirements to reflect normal levels of market vacancy in employment space.
- 2 Where a reduction in jobs is forecast, the associated negative floorspace is halved. This reflects that while there may be ongoing job losses (e.g. as firms use more efficient

²⁷ Homes and Communities Agency, Employment Density Guide 3rd Edition, November 2015

production approaches), it does not automatically follow that all of the existing employment space will be lost.

- 3 It has been assumed that a gross area of 1ha is required to develop 4,000sqm of office, industrial and warehousing/distribution space (equal to a plot ratio of 40%).

Scenario 1: Baseline

- 6.7 The baseline scenario applies the outputs of the employment forecast for the years 2017 to 2032 prepared by Oxford Economics (published Q3 2018).
- 6.8 Taking account of recent and anticipated future regional and national macroeconomic assumptions, this forecast shows the changing level of employment in 19 different economic sectors over the 39-year period from 1993 to 2032. These relate to the UK Standard Industrial Classification (SIC) code groups, as detailed in Appendix 2.
- 6.9 It is important to note that there are inherent limitations to the use of economic forecasts of this type, particularly within the context of recent economic and political changes. National macroeconomic assumptions are taken as the starting point and then modelled down to the regional and local levels by reference to the existing economic profile and sectoral composition of an area. Local level data is less comprehensive and reliable than at national and regional levels which can affect how the modelling is calibrated. Similarly, top-down forecasts do not take account of specific local factors that might influence employment growth. However, forecasts are seen as a valuable input to indicate the broad scale and direction of future economic growth within different sectors, which helps assess the future land requirements of a local area.

Employment growth in Lisburn & Castlereagh

- 6.10 The Oxford Economics forecasts anticipate overall growth of 4,608 jobs (6.7%) between 2017 and 2032 in Lisburn & Castlereagh, equivalent to 307 jobs per year. Table 6.1 provides an overview of the forecasted change in employment by sector over the LDP review period. It also compares this change for Lisburn & Castlereagh to that anticipated in the Belfast area (BA), Northern Ireland (NI) and the UK.
- 6.11 The overall anticipated level of employment growth in LCCC (6.7%) between 2017 and 2032 is lower than the forecasted growth in the Belfast area (7.5%) but higher than the average in NI (4.9%) and slightly higher than the UK average (6.6%).

Table 6.1 Forecast employment growth by sector (2017-2032)

Sector	Lisburn & Castlereagh		BA	NI	UK
	No. additional jobs	%	%	%	%
N: Administrative and support service activities	+1,237	+28.7%	+27.4%	+27.5%	+21.4%
Q: Human health and social work activities	+1,148	+8.4%	+8.8%	+7.1%	+8.2%
F: Construction	+1,002	+18.5%	+18.7%	+16.0%	+16.2%
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	+885	+6.8%	+5.6%	+4.2%	+5.9%
M: Professional, scientific and technical activities	+818	+23.6%	+26.0%	+23.9%	+19.3%
I: Accommodation and food service activities	+473	+13.1%	+15.0%	+10.9%	+9.9%
R: Arts, entertainment and recreation	+419	+23.6%	+24.2%	+22.0%	+19.7%
S: Other service activities	+228	+10.4%	+9.9%	+8.3%	+7.5%
J: Information and communication	+178	+17.7%	+16.8%	+16.8%	+13.4%
A: Agriculture, forestry and fishing	+33	+2.3%	-8.2%	-9.0%	-11.1%
L: Real estate activities	+24	+8.7%	+12.0%	+10.4%	+13.3%
B: Mining and quarrying	0	0.0%	-41.9%	-38.6%	-34.0%
E: Water supply; sewerage, waste management and remediation activities	-19	-6.4%	-8.9%	-7.9%	-11.0%
D: Electricity, gas, steam and air conditioning supply	-31	-11.1%	-8.1%	-8.3%	-11.4%
K: Financial and insurance activities	-32	-4.1%	-3.9%	-4.2%	-2.0%
P: Education	-38	-0.9%	+1.3%	-1.3%	+1.5%
H: Transportation and storage	-122	-7.0%	-0.1%	-4.6%	-0.2%
O: Public administration and defence; compulsory social security	-564	-10.0%	-9.5%	-10.9%	-8.8%
C: Manufacturing	-1,033	-17.7%	-13.2%	-12.3%	-18.6%
Total	+4,608	+6.7%	+7.5%	+4.9%	+6.6%

Source: Oxford Economics forecast (Q3 2018)

6.12 Lisburn & Castlereagh is forecast to experience higher levels of employment growth than the Belfast area, NI and the UK in the following sectors:

- 1 Administrative and support service activities;
- 2 Wholesale and retail trade; repair of motor vehicles and motorcycles;
- 3 Other service activities;
- 4 Information and communication; and,
- 5 Agriculture, forestry and fishing.

6.13 Lisburn & Castlereagh is forecast to experience greater losses of employment than Belfast in several sectors:

- 1 Water supply; sewerage, waste management and remediation activities;
- 2 Electricity, gas, steam and air conditioning supply;
- 3 Financial and insurance activities;
- 4 Education;

- 5 Transportation and storage;
- 6 Public administration and defence; compulsory social security; and
- 7 Manufacturing.

6.14 The forecast level of contraction in employment in the transportation and storage sector in Lisburn & Castlereagh (-7.0%) is significantly greater than in the Belfast area, NI and the UK.

Translation of forecasts into use class B employment

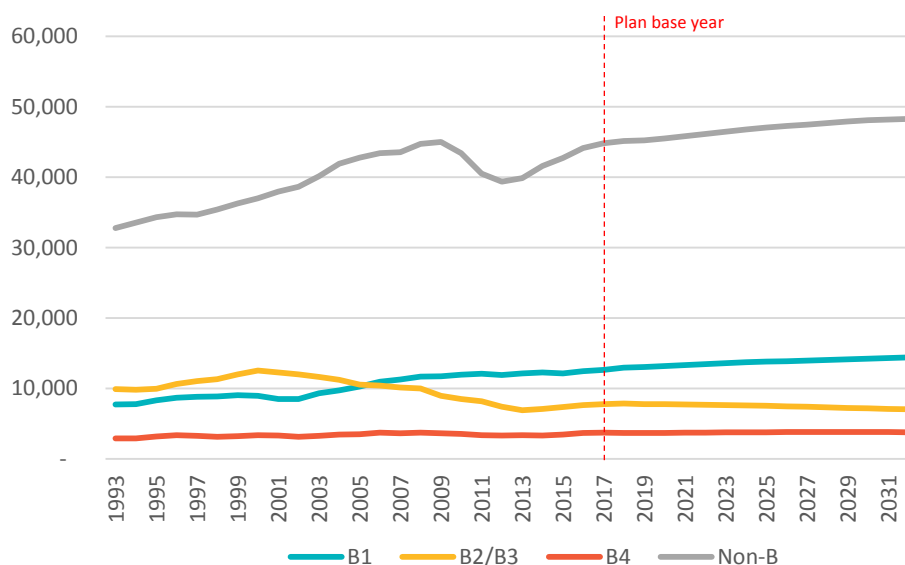
6.15 The analysis breaks down the Oxford Economics forecast of employment change by sector into B class and non-B categories, based on data from the NI Business Register and Employment Survey (September 2017). Table 6.2 details the forecast employment change for the 2017-2032 plan period, whilst Figure 6.1 considers projected changes in employment levels in the B and non-B categories in the context of past trends.

Table 6.2 Forecast employment change in Lisburn & Castlereagh (2017-2032)

	Number of Jobs		Change (2017-2032)	
	2017	2032	#	%
Business (B1)	12,648	14,405	+1,758	+13.9%
Industrial (B2/B3)	7,750	7,021	-729	-9.4%
Storage or Distribution (B4)	3,702	3,790	+88	+2.4%
Total B Class Jobs	24,100	25,216	+1,116	+4.6%
Non-B Class	44,806	48,298	+3,492	+7.8%
Total Jobs in All Sectors	68,906	73,514	+4,608	+6.7%

Source: Oxford Economics (Q3 2018) / Lichfields analysis

Figure 6.1 Employment growth in B and non-B class sectors in LCCC, 1993-2032



Source: Oxford Economics (Q3 2018) / Lichfields analysis

- 6.16 This analysis indicates that the B1 sectors account for the vast majority of anticipated job growth. The Office Capacity Study (2019) commissioned by LCCC provides analysis of the demand for office space in terms of size, quality and location.
- 6.17 A limited amount of growth is expected in the B4 sectors. Losses of jobs are expected in the B2/B3 sectors.
- 6.18 As stated above, the forecast anticipates that there will be an overall increase of 4,608 jobs in Lisburn & Castlereagh between 2017 and 2032, equivalent to 307 jobs per annum. Of these jobs, 1,116 will be in use class B sectors, equivalent to 74 jobs per annum.
- 6.19 The results of this scenario in floorspace and land terms are presented in Table 6.3.

Table 6.3 Baseline scenario: Need for employment land (2017-2032)

	Employment change	Floorspace ratio (sqm per job)	Floorspace (including 10% vacancy where positive) (sqm)	Total need** (ha)	Annual need (ha)
B1	+1,758	12.5	+24,168	+6.04	+0.40
B2/B3	-729	45	-16,406	-4.10	-0.27
B4	+88	65	+6,264	+1.57	+0.10
Total B Class	+1,116		+14,026	+3.51	+0.23

Source: Lichfields analysis

- 6.20 This initial calculation indicates a total need for an additional 3.5 ha of employment land from 2017 to 2032, equivalent to 0.23 ha per annum. This excludes any safety margin to allow for choice, churn and flexibility, as well as for the replacement of any sites that are lost to non-B class uses.

Sensitivity 1: No “netting off” employment land

- 6.21 The approach applied in the baseline scenario effectively “nets off” employment gains in office and storage/distribution sectors against job losses in industrial activities. It therefore assumes that all surplus industrial land could be repurposed for other employment purposes (i.e. offices or storage/distribution) regardless of whether they are necessarily suitable for such uses.
- 6.22 Accordingly, a further step has been applied in this sensitivity test whereby losses in one type of B use class are not balanced against gains in another B use class category, as illustrated in Table 6.4. This approach accepts that employment land cannot necessarily be switched from one B use to another.

Table 6.4 No netting off employment land scenario: Need for employment land (2017-2032)

	Employment change	Floorspace ratio (sqm per job)	Floorspace (including 10% vacancy where positive) (sqm)	Total need (with plot ratio of 0.4) (2017-2032) (ha)	Annual need (ha)
B1	+1,758	12.5	+24,168	+6.04	+0.40
B2/B3	-729	45	-	-	-
B4	+88	65	+6,264	+1.57	+0.10
Total B Class	+1,116				
Net additional land requirement assuming no “netting off” for employment land			+30,432	+7.61	+0.50

Source: Lichfields analysis

6.23 This approach indicates a need for an additional 7.61ha of employment land from 2017 to 2032, equivalent to 0.5ha per annum.

6.24 This assessment so far excludes any safety margin to allow for choice, churn and flexibility, as well as for the replacement of any sites that are lost to non-B class uses.

Sensitivity 2: No “netting off” job losses

6.25 A second sensitivity test has been applied to the baseline scenario in order to reflect the fact that, in assessing employment land requirements and in seeking to ensure that adequate provision is made for future development, job losses in one sector cannot be offset against gains in other sectors within the same use class. For example, it may not be appropriate for job losses in heavier forms of manufacturing to be "netted off" against anticipated growth in office uses. The implication of this might be a failure to provide sufficient employment land for growth sectors, resulting in any existing shortages being exacerbated.

6.26 Possible reasons for this include:

- 1 Different sectors within an individual B Class category may have different land requirements, and so it is not possible to assume that land released as a result of job losses in some sectors would be suitable for other activities in the same use class; and,
- 2 Job losses would not necessarily result in release of land.

6.27 Under this scenario, where a negative jobs change has been identified within the forecasts for a particular sector, it is assumed that there will be no loss of jobs and a figure of zero is applied.

6.28 The employment land implications of this scenario are set out below.

Table 6.5 No netting off jobs scenario: Need for employment land (2017-2032)

	Employment change	Floorspace ratio (sqm per job)	Floorspace (including 10% vacancy) (sqm)	Total need (with plot ratio of 0.4) (2017-2032) (ha)	Annual need (ha)
B1	+2,132	12.5	+29,311	+7.33	+0.49
B2/B3	+304	45	+15,053	+3.76	+0.25
B4	+171	65	+12,214	+3.05	+0.20
Total B Class	+3,753		+56,577	+14.14	+0.94

Source: Lichfields analysis

Scenario 3: Past Employment Trends (1993-2017)

6.29 In order to inform a robust understanding of future growth, Lichfields has considered past trends recorded in the Oxford Economics forecast data (Q3 2018) alongside the baseline economic forecast of future change.

6.30 Given that none of the alternative methodologies for assessing future employment growth and land requirements are perfect, there is considerable benefit in considering a range of approaches. Past trend-based approaches offer the advantage of reflecting actual performance, albeit that there can be no certainty that historic conditions will be repeated in the future. Any trend-based assessment is also reliant upon the reliability of the monitoring of trends that has been undertaken and the data that is now available.

- 6.31 The period between 1993 (the earliest year with available data)²⁸ and 2017 has been selected as the basis of this scenario given that this covers a long period of time which includes a number of market cycles including both periods of recession and growth, as indicated in section 3.0 (Figure 3.6).
- 6.32 During this time there was an increase of 651 jobs per annum in LCCC (111.8% higher than the overall forecasted job growth for 2017 to 2032). This increase included an additional 149 jobs per annum in use class B sectors (99.8% higher than the forecasted job growth for 2017 to 2032).
- 6.33 This scenario carries forward the past level of job growth for the use class B sectors through the LDP period, i.e. a total of 2,230 jobs in these sectors over the 15-year Plan period. The employment land implications of these assumptions are illustrated below.

Table 6.6 Past trends employment (1993-2017)

	Employment change	Floorspace ratio (sqm per job)	Floorspace (including 10% vacancy) (sqm)	Total need (ha)	Annual need (ha)
B1	+3,066	12.5	+42,151	+10.54	+0.70
B2/B3	-1,335	45	-30,041	-7.51	-0.50
B4	+499	65	+35,707	+8.93	+0.60
Total B Class	+2,230		+47,816	+11.95	+0.80

Source: Oxford Economics / Lichfields analysis

Scenario 4: Labour Supply

- 6.34 In contrast to the approaches previously set out, this scenario focuses upon the future supply of labour rather than the demand for labour created by economic growth. It indicates the number of new jobs needed to match the future supply of working-age population and calculates how much employment space would be required to accommodate these jobs.
- 6.35 This scenario is based on the level of population growth anticipated by the 2016-based population and household projections scenario in the Housing Growth Study prepared for LCCC by Lichfields (2019) ('Scenario A' in the Housing Growth Study).
- 6.36 Through the application of future economic activity rates based on the OBR future economic projections this level of future housing growth would generate a growth in the labour force of 10,764 people, who could support 9,005 new jobs (600 per annum) over the plan period.
- 6.37 The proportion of these jobs that will be in the use class B sectors has been calculated based on the ratio of jobs in the B class sectors to total jobs from the OE forecast for 2017 to 2032 (as presented in the baseline scenario).
- 6.38 Table 6.7 summarises the resident and workplace labour supply and the number of jobs supported in each use class B sector resulting from this scenario.

²⁸ Whilst LGD boundaries changed in 2015, the Oxford Economics data relates to the current geographical area of Lisburn & Castlereagh and of the Belfast Metropolitan Area.

Table 6.7 Forecast labour supply and jobs supported in Lisburn & Castlereagh (2017-2032)

	2017	2032	Total change (2017-2032)
Population	142,561	159,847	+17,286
Labour force	102,649	113,413	+10,764
Total no. of jobs supported	85,878	94,884	+9,005
Jobs in B1 sectors	15,763	18,593	+2,830
Jobs in B2/B3 sectors	9,659	9,062	-597
Jobs in B4 sectors	4,614	4,892	+277
All B class jobs	30,036	32,546	+2,510
Non-B class jobs	55,842	62,338	+6,496

Source: Lisburn & Castlereagh Housing Growth Study (2019) / Lichfields analysis

6.39 This analysis results in a requirement for 2,510 B class jobs in Lisburn & Castlereagh between 2017 and 2032, equivalent to 167 additional B class jobs per annum on average. However, this figure takes account of a loss of 597 jobs in the B2/B3 industrial sectors over this period.

6.40 These job numbers have been translated into estimated requirements for B class employment space by applying the same assumptions used in the labour demand approach (Scenarios 1 to 4), as illustrated in Table 6.8 below.

Table 6.8 Labour supply scenario: Need for employment land (2017-2032)

	Employment change	Floorspace ratio (sqm per job)	Floorspace (including 10% vacancy where positive) (sqm)	Total need (ha)	Annual need (ha)
B1	+2,830	12.5	+38,913	+9.73	+0.65
B2/B3	-597	45	-13,433	-3.36	-0.22
B4	+277	65	+19,806	+4.95	+0.33
Total B Class	+2,510		+45,286	+11.32	+0.75

Source: Lichfields analysis

Net to Gross Adjustments

6.41 To convert the net requirement of employment space into a gross requirement (the amount of employment space or land to be zoned and planned for), an allowance is typically made for the replacement of losses of existing employment space that may be developed for other, non-B class uses. The purpose of this allowance is to ensure that sufficient space is provided to account for any employment space that might be lost in the future, and thereby to provide some protection against the continued erosion of the employment stock.

6.42 This assessment applies an average loss of 0.51ha of employment floorspace per annum, based on trends experienced between 2015 and 2019, as set out in the LCCC Employment Land Monitor (2015-2019) (as discussed in section 4.0).

Table 6.9 Net to gross adjustments (2017-2032)

Scenario	Floorspace (including 10% vacancy) (sqm)	Gross land requirement	Net land requirement including allowance for loss of 0.51ha pa(ha)	Annual land requirement (ha)
Baseline	+14,026	+3.51	+11.16	+0.74
Baseline with no “netting off” employment land (Sensitivity 1)	+30,432	+7.61	+15.26	+1.02
Baseline with no “netting off” jobs (Sensitivity 2)	+56,577	+14.14	+21.79	+1.45
Past employment trends (1993-2017)	+47,816	+11.95	+19.60	+1.31
Labour supply	+45,286	+11.32	+18.97	+1.26

Source: Lichfields analysis

Flexibility Margin

6.43 In estimating the overall requirement for employment land, it is also appropriate to make an allowance for additional land to come forward. The flexibility margin is designed to ensure that the effective operation of the local economy is not undermined by a shortage of employment land. It is therefore intended to:

- 1 Provide for a margin of error given the uncertainties in the forecasting process;
- 2 Allow developers and occupiers a reasonable choice of sites; and
- 3 Make allowance for delays in some zoned sites coming forward.

6.44 A common approach is to make an allowance that is equivalent to the average time for a site to gain planning permission and be delivered, typically about 2 years. The implications of this for each of the scenarios considered above is summarised in Table 6.10.

Table 6.10 Flexibility margin allowances

Scenario	Requirement (including allowance for loss of 0.51ha pa (ha))	Flexibility margin (2 years) (ha)	Total requirement (ha)	Annual land requirement (ha)
Baseline	+11.16	+1.49	+12.64	+0.84
Baseline with no “netting off” employment land (Sensitivity 1)	+15.26	+2.03	+17.29	+1.15
Baseline with no “netting off” jobs (Sensitivity 2)	+21.79	+2.91	+24.70	+1.65
Past employment trends (1993-2017)	+19.60	+2.61	+22.22	+1.48
Labour supply	+18.97	+2.53	+21.50	+1.43

Source: Lichfields analysis

Scenario 5: Past Completions

6.45 Monitoring data on past completions of employment sites from 2015 to 2019 is available from the LCCC Employment Land Monitor (2015-2019). Whilst this length of time is not sufficient to

even out demand fluctuations, it still provides a useful comparison in the estimation of future employment land need.

6.46 As detailed in Figure 4.12 and Table 4.4, between 2015 and 2019, a total of 11.97ha of employment space was completed (2.99ha per annum), comprising:

- 1 4.75 ha of B1 employment space, equivalent to 1.19ha per annum;
- 2 3.42 ha of B2 employment space, equivalent to 0.86ha per annum; and,
- 3 3.80 ha of B4 employment space, equivalent to 0.95ha per annum.

6.47 No B3 employment space was completed during this monitoring period, so it is combined with B2 for the purposes of this scenario.

6.48 These figures represent gross completions of employment space and do not take account of losses. It is also important to note that, whilst these figures do not include extensions to existing premises on employment sites, they may include new buildings on existing employment land. This means it would not be necessary to zone additional land for such changes, and these completions would therefore have no impact upon the overall employment land portfolio.

6.49 Notwithstanding these limitations, one view of future growth in LCCC could assume that the past development rates carry on in the future at the past average. The results of this scenario are illustrated below.

Table 6.11 Gross employment space requirements based on past completions 2017-2032

	Annual gross development rates (ha)*	Gross future completions (2017-2032) (ha)
B1	+1.19	+17.85
B2/B3	+0.86	+12.90
B4	+0.95	+14.25
Total	+2.99	+44.85

Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis * Figures may not sum due to rounding

Summary

6.50 In interpreting the outputs of the scenarios outlined in this section, it is important to give regard to the importance of considering a range of data and forecasts of need. An important caveat is that there are inevitable uncertainties and limitations associated with modelling assumptions under any of the future growth scenarios considered.

6.51 In this context, a range of scenarios have been considered as summarised in Table 6.12. These scenarios give rise to a wide range of employment land requirements, ranging from +12.64ha to +44.85ha, equivalent to a range of +0.84ha to +2.99ha per annum. The past completions scenario implies the highest future requirement, significantly above the other scenarios considered.

Table 6.12 Summary of scenario outputs, 2017-2032

Scenario	Total need (2017-2032) (ha)	Annualised need (ha)
Baseline	+12.64	+0.84
Baseline with no “netting off” employment land (Sensitivity 1)	+17.29	+1.15
Baseline with no “netting off” jobs (Sensitivity 2)	+24.70	+1.65
Past employment trends (1993-2017)	+22.22	+1.48
Labour supply	+21.50	+1.43
Past completions	+44.85	+2.99

Source: Lichfields analysis

7.0 Assessment of Employment Sites

7.1 This section presents the findings of the assessment of employment land supply in Lisburn & Castlereagh and its suitability to meet employment development needs.

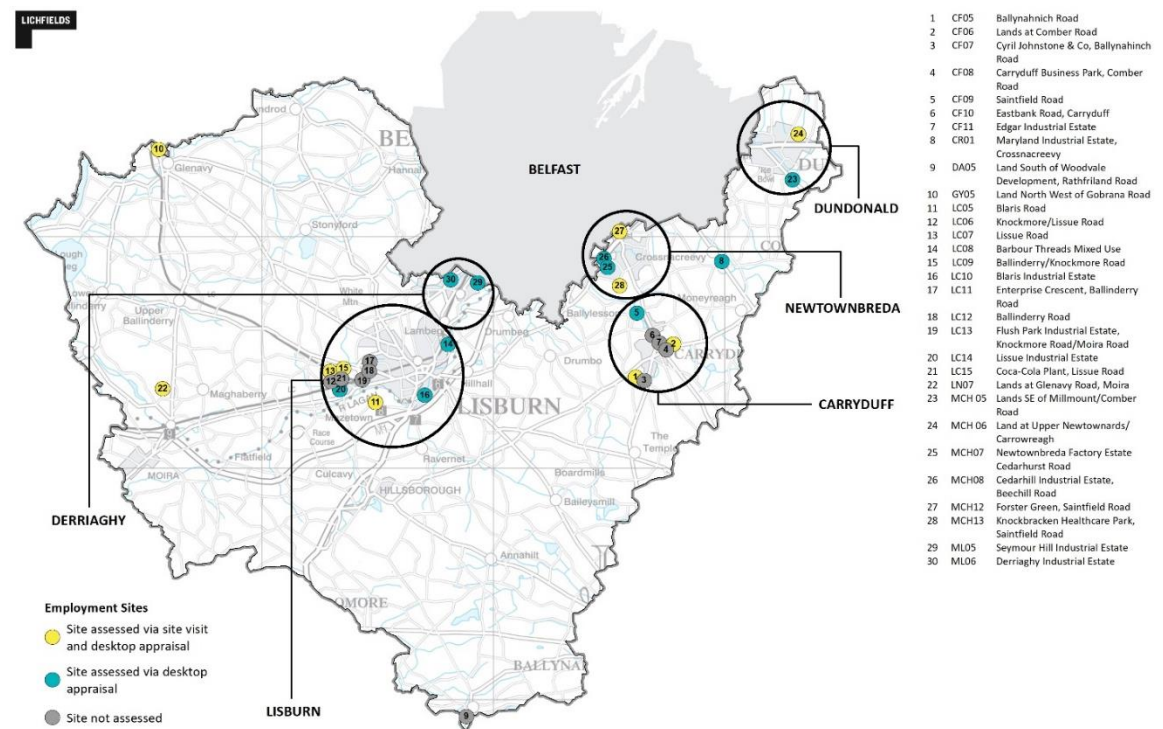
Approach

7.2 Through the emerging LDP, LCCC is proposing 30 sites to be considered for employment zoning. These include sites already in employment use and with land available for development. Of these sites:

- 1 10 were previously zoned in the Lisburn Area Plan (2001);
- 2 3 were zoned in the Carryduff Local Plan (2001); and
- 3 1 was zoned in the Belfast Urban Area Plan (2001).

7.3 All 30 sites were zoned for employment uses in the draft BMAP 2015. The majority of these sites are grouped into the five key areas of Lisburn, Derriagh, Carryduff, Newtownbreda and Dundonald. The location of all sites is illustrated in Figure 7.1.

Figure 7.1 Proposed employment sites



Source: LCCC / Lichfields analysis

7.4 Lichfields has completed an assessment of two thirds (20) of these sites based on the following criteria. Accompanied by LCCC planning officers, Lichfields undertook site visits to a sample of 10 of these sites.

Table 7.1 Site assessment criteria

Criteria	Key Considerations
Access	Road access Public transport access Pedestrian/cycle access
Site context	Proximity to residential area/community facilities Buildings quality and condition (if applicable) Brownfield/greenfield status (undeveloped area only) Adjoining uses Proximity to infrastructure
Environment	Landscape and environmental designations TPOs Topography Contamination Flood risk
Market strength	Levels of market demand (where known)

Source: Lichfields

- 7.5 Appendix 3 includes a matrix with details of how each category was assessed, and Appendix 4 contains the individual proformas for each site summarising the rationale for the scores attributed to each criterion. These proformas should be read in conjunction with LCCC's description of each site with associated mapping in its Employment Land Monitor (2015-2019).
- 7.6 Each site was assessed in relation to each criterion based on a score of 1 (poor) to 3 (good), in turn summed to give an overall score for each site, with each being equally weighted. The sites were ranked according to their overall scores as follows:
- 1 Score of 28+: Good;
 - 2 Score of 24-27: Average; and,
 - 3 Score of 1-23: Poor.
- 7.7 The purpose of these scores is to provide an indication of the relative attributes of each site. It is important to note that a site that is identified as being "poor" against a single criterion does not necessarily mean it should be classed as a "poor" site overall. Some criteria may be regarded as more important than others in determining a site's suitability for existing employment uses or possible future development.
- 7.8 Moreover, even if some sites do not perform well against all of the criteria in combination, an assumption should not necessarily be made that the site should be released/redeveloped for alternative purposes, as such sites may still perform an important contribution for the local economy.
- 7.9 In addition, the assessment process in itself does not necessarily provide a complete picture of the local significance of certain sites. For example, a site could be assessed to have the potential to satisfy particular business and sector needs (i.e. which can be important reasons for retaining the site) even if it does not perform well against conventional site assessment criteria.

Assessment Findings

- 7.10 Based on the scoring process described, the 20 assessed sites have been categorised as follows:
- 1 Good: 6 sites (MLO6, LCO9, LNO7, CFO5, MCH12 and CFO9);

- 2 Average: 9 sites (MCH06, MCH05, LC14, MCH07, LC10, MCH13, CR01, MCH08 and CF06); and,
- 3 Poor: 5 sites (LC05, ML05, GY05, LC07 and LC08).

7.11 Individual site proformas, including the assessment of each site against these appraisal criteria, are included in Appendix 4. Details of the criteria used to assess these sites are contained in Appendix 3.

7.12 A summary of the overall site scores is provided at Table 7.2, and a matrix indicating the score for each criterion is provided at Table 7.3.

Table 7.2 Overall site scores

Site	Area available for additional employment use (ha)	Overall score
Good		
ML06 Dunmurry and Derriaghy Industrial Estates, Metropolitan Lisburn	5.27	30
LC09 Knockmore Hill/Business Park, Ballinderry Road/Knockmore Road, Lisburn City	17.74	30
LN07 Glenavy Road, Moira	11.80	29
CF05 Ballynahinch Road, Carryduff	11.29	29
MCH12 Forster Green, Saintfield Road, Castlereagh	0.20	28
CF09 Saintfield Road, Carryduff	0.47	28
Average		
MCH06 Dundonald Industrial Estate/Inspire Business Centre, Carrowreagh / Land at Upper Newtownards	23.08	27
MCH05 Land South East of Millmount Road, Comber Road, Metropolitan Castlereagh	8.56	27
LC14 Lissue Industrial Estate, Moira Road, Lisburn City	3.73	27
MCH07 Newtownbreda Factory Estate, Cedarhurst Road, Metropolitan Castlereagh	0.00	27
LC10 Blaris Industrial Estate, Altona Road, Lisburn City	0.77	26
MCH13 Knockbracken Healthcare Park, Saintfield Road, Castlereagh	44.01	25
CR01 Maryland Industrial Estate, Crossnacreevy, Castlereagh Countryside	0.11	25
MCH08 Industrial Estate, Beechill Road, Metropolitan Castlereagh	0.38	24
CF06 Lands at Comber Road, Carryduff	5.26	24
Poor		
LC05 Blaris Road, Lisburn	60.0	23
ML05 Seymour Industrial Estate, Metropolitan Lisburn	4.73	23
GY05 Land North West of Gobraha Road, Glenavy	6.27	22
LC07 Lissue Road, Lisburn City	10.86	22
LC08 Barbour Threads Mill, Mill Estate, Lisburn City	2.83	22

Source: LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

Table 7.3 Qualitative analysis of proposed employment sites

Site	Access			Site context				Environment			Market strength		
	Overall score	Road access	Public transport access	Pedestrian/cycle access	Proximity to residential area/community facilities	Brownfield/greenfield status (undeveloped area only)	Adjoining uses	Proximity to infrastructure	Landscape and environmental designations	TPOs	Topography	Flood risk	Market strength
Good													
ML06 Dunmurry and Derriagh Industrial Estates, Metropolitan Lisburn	30	3	3	3	3	2	3	3	1	3	3	1	2
LC09 Knockmore Hill/Business Park, Ballinderry Road/Knockmore Road, Lisburn City	30	3	2	3	3	2	3	3	1	2	2	3	3
LN07 Glenavy Road, Moira	29	3	1	1	1	3	3	3	2	3	3	3	3
CF05 Ballynahinch Road, Carryduff	28	3	3	2	1	1	2	2	2	3	3	3	3
MCH12 Forster Green, Saintfield Road, Castlereagh	28	2	3	2	3	3	2	3	2	3	1	3	1
CF09 Saintfield Road, Carryduff	28	3	2	3	3	3	2	3	1	3	2	2	1
Average													
MCH06 Dundonald Industrial Estate / Inspire Business Centre, Carrowreagh / Land at Upper Newtownards	27	3	2	3	3	2	2	3	2	3	1	2	1
MCH05 Land South East of Millmount Road, Comber Road, Metropolitan Castlereagh	27	3	2	2	3	1	2	2	1	3	3	3	2
LC14 Lissue Industrial Estate, Moira Road, Lisburn City	27	3	2	2	2	1	2	3	1	3	3	2	3

MCH07 Newtownbreda Factory Estate, Cedarhurst Road, Metropolitan Castlereagh	27	1	2	2	3	3	1	3	1	3	3	2	3
LC10 Blaris Industrial Estate, Altona Road, Lisburn City	26	3	2	2	3	1	2	3	1	3	2	3	1
MCH13 Knockbracken Healthcare Park, Saintfield Road, Castlereagh	25	3	2	3	2	2	2	3	1	2	1	3	1
CR01 Maryland Industrial Estate, Crossnacreevy, Castlereagh Countryside	25	3	1	2	1	1	1	3	1	3	3	3	3
MCH08 Industrial Estate, Beechill Road, Metropolitan Castlereagh	24	1	2	2	3	1	2	3	1	3	2	2	2
CF06 Lands at Comber Road, Carryduff	24	2	2	1	3	1	2	3	2	3	2	2	1
Poor													
LC05 Blaris Road, Lisburn (West Lisburn)	23	1	1	1	1	1	3	1	2	3	3	3	3
ML05 Seymour Industrial Estate, Metropolitan Lisburn	23	1	2	1	3	1	2	3	1	3	2	3	1
GY05 Land North West of Gobra Road, Glenavy	22	2	2	1	1	1	1	2	2	3	3	3	1
LC07 Lissue Road, Lisburn City	22	2	2	1	1	1	2	3	2	3	3	1	1
LC08 Barbour Threads Mill, Mill Estate, Lisburn City	22	1	2	1	3	1	1	3	1	3	2	3	1

Source: Lichfields analysis

Good Sites

- 7.13 The 6 sites that scored 28 and over are categorised as “good”. These sites are located in the Lisburn area (2 sites), Carryduff (2 sites), Moira (1 site) and Castlereagh (1 site).
- 7.14 In general, these sites benefit from good access to the road network, limited potential for conflict with adjoining uses, and potentially good access to infrastructure. However, access to the sites by public transport and pedestrian/cycle access to these sites is mixed, with only 3 of the 6 sites scoring a “3” for public transport and 3 scoring a “3” for pedestrian/cycle access.
- 7.15 Three of the six sites (LC09, LNO7 and CF05) appear to benefit from a relatively strong market interest for employment use, as evidenced by recent or live planning applications for employment uses and overall lower levels of vacancy for existing units / proximity to existing employment uses.

Average Sites

- 7.16 The nine sites categorised as “average” (24-27 points) are located in the Lisburn area (2 sites), Castlereagh (5 sites), Carryduff (1 site) and Dundonald (1 site).
- 7.17 In general, these sites benefit from good accessibility (both in terms of road and pedestrian access), and proximity to residential areas and community facilities. However, these sites are also subject to constraints. Seven of the sites scored poorly for landscape and environmental designations. This means the development potential of remaining land could be undermined by proximity to designated areas. Potential conflicts with adjoining uses were also identified for a number of these sites.
- 7.18 Market demand for employment uses was mixed for these sites, with indicators of good demand at LC14, MCH07 and CR01. However, there are few indications of market interest for the other sites in this category. Sites such as MCH06 and LC10 have been zoned for employment for a number of years but the undeveloped areas of these sites have not been subject to recent interest for development.

Poor Sites

- 7.19 Four of the five sites categorised as “poor” (23 and below) are located in the Lisburn area and one is in Glenavy.
- 7.20 These sites are subject to a number of disadvantages and constraints. Access to the major road network is poor or average for these sites, with some sites subject to constraints that will limit the flow of traffic and access for large vehicles. Pedestrian and cycle access are poor for all of these sites. The undeveloped areas of all of these sites are greenfield.
- 7.21 Market interest in developing these sites for employment uses is likely to be weak for 4 out of the 5 sites, with the exception of LC05 (Blaris/West Lisburn) – although the delivery of this site depends on the delivery of the Knockmore Link Road.

Overall Commentary

- 7.22 A total of 11 of the 20 assessed sites scored highly in relation to access to the road network. However, the scoring process only considered access to A roads generally and did not specifically take account of the views expressed by consultees that the A1/M1 corridor should be a focus for employment zonings. Of the proposed sites, one is already well-located in relation to this corridor (LC10 – Blaris Industrial Estate, Altona Road, Lisburn) and the key strategic site (LC05 – Blaris Road, Lisburn (West Lisburn) would be better located if the proposed

Knockmore Link Road is brought forward. The delivery of the Link Road would also substantially improve connectivity for a further 8 sites to the west of Lisburn: LCo6, LCo7, LCo9, LC11, LC12, LC13, LC14 and LC15.

- 7.23 A total of 12 of the sites scored well in relation to proximity to residential areas and community facilities. This is particularly important for the B uses that support larger numbers of jobs per square metre, i.e. B1 and B2 uses.
- 7.24 It is also important to take into account the need to avoid conflict between adjoining uses, which can be an issue particularly for heavier industrial uses (B3) and transport/distribution (B4). However, a total of only 4 of the proposed sites scored a “1” in this respect (MCH07, CRO1, GY05 and LCo8). Subject to the specific details of the proposals, these sites could still be suitable for business (B1) or light industrial use (B2).
- 7.25 The proposed sites include a mix of greenfield and brownfield undeveloped land but there is a higher proportion of greenfield land. The undeveloped areas within 12 of the sites were of greenfield status, and an additional 4 sites included an approx. 50/50 split of greenfield/brownfield land. Only 4 sites’ undeveloped areas constitute entirely brownfield land (LNo7, MCH12, CF09 and MCH07). A preference for previously developed land is in accordance with the SPPS strategic objectives and RDS strategic guidance. However, conversely LCCC may seek to zone greenfield land in order to reduce the cost of development, thereby removing barriers to inward investment. The balance to be taken in this respect will be a matter of judgment for the Council.
- 7.26 A total of 10 of the 20 assessed sites scored poorly in terms of market demand, indicating that this is a concern generally. These sites are distributed across Lisburn & Castlereagh, with 4 in the Lisburn area (LC10, MLo5, LCo7 and LCo8), 2 in Carryduff (CF09 and CF06), 2 in Dundonald (MCH12 and MCH13), 1 in Newtownbreda (MCH06) and 1 in Glenavy (GY05). However, 7 of the assessed sites did show signs of market interest. These sites are also spread across the area, with 3 to the west of Lisburn (LCo9, LC14 and LCo5), 1 in Carryduff (CF05), 1 in Moira (LNo7), 1 in Newtownbreda (MCH07) and 1 in Crossnacreevy (CRO1). This geographical spread of sites with varying levels of market interest indicates the extent to which market interest is not solely driven by location.

8.0 Conclusions and Policy Implications

8.1 This section draws together overall conclusions from the preceding sections and outlines the key implications in relation to planning for future employment land needs in Lisburn & Castlereagh.

Economic Characteristics

8.2 Lisburn & Castlereagh is one of the smaller local authority geographies in Northern Ireland, but has a growing and skilled population, with higher than average economic activity rates and low unemployment. It is situated on the Belfast-Dublin corridor and benefits from good strategic transport connections.

8.3 There are currently around 69,000 workforce jobs in the local economy, and it has grown strongly in recent years, out-performing the job growth rate for Northern Ireland as a whole over the same period. The area is a net exporter of labour to Belfast and has a close functional economic relationship with the City. However, the area is also an important economic centre in the wider region, also attracting significant inflows of workers. The largest sectors in the Lisburn & Castlereagh economy are health and social work, wholesale and retail, followed by manufacturing, public administration and construction.

8.4 In recent years, the majority of job growth in Lisburn & Castlereagh has been within non B class sectors, while the overall share of B class jobs has declined (from 38% in 1993 to 35% in 2017). However, B1 (business) and B4 (storage and distribution) jobs have grown strongly, whilst B2/B3 (light and general industrial) jobs have declined.

Property Market Characteristics

8.5 Some 60% of recorded commercial properties in Lisburn & Castlereagh are recorded as offices, with the remaining 40% recorded as industrial uses. The largest cluster of these properties are within Lisburn City which accounts for nearly half of all commercial premises, followed by Dundonald and Carryduff. Alongside the main estates, there is a pattern of industrial units being located close to strategic transport routes such as the A3 and M1, as well as smaller premises dispersed in more rural areas.

8.6 There are 30 main employment areas across Lisburn & Castlereagh (zoned accordingly in the BMAP), which total 579.7ha. Of this, 275.4 ha (47.5%) is currently undeveloped comprising 92% greenfield and 8% brownfield land. Of the total supply of land at these sites, 11.2% is recorded as being within B-class employment use and 4.2% is developed for non-B uses. A large component within the zoned supply has been as identified as undevelopable, comprising roads, servicing and landscape areas.

8.7 Only a limited period of monitoring data is available, which indicates annual B class completions of 2.99 ha during the 2012-19 period. Recent completions have been driven by B1, B2 and B4 uses (no B3 completions were recorded). Over the same period, total losses of B use space were modest, equating to 2.0 ha.

8.8 Market consultation undertaken to inform this study reflected current uncertainty in the economic outlook but generally were positive about the local economy. In the main, views were also positive about the current portfolio of employment land available in Lisburn & Castlereagh, although there was some suggestion of a need for greater focus on sites with the best transport connectivity and the Belfast-Dublin corridor where demand is greatest. There was support for the proposed Knockmore Link Road, which would unlock a number of sites in West Lisburn and onwards to Derriaghy for larger scale employment opportunities.

Future Employment Land Needs

- 8.9 In line with the RDS and Planning Practice Guidance from elsewhere in the UK on undertaking economic development needs assessments, several different scenarios of future economic growth in Lisburn & Castlereagh have been considered as part of this study. These produce a series of B class floorspace requirements that range from 12.64ha (under the baseline scenario) to 44.85ha (under the past completions scenario) over the period from 2017 to 2032.
- 8.10 It is important to note that this assessment is policy-neutral. It identifies the likely need for employment land based on economic forecasts, past trends and previous completions but does not take account of any objectives to boost economic growth or to attract specific types of business or inward investment.
- 8.11 The assessment in section 6.0 identified an overall need for between +9.17ha and +44.85ha (gross) of additional employment land over the LDP period (2017 to 2032). This requirement includes a flexibility margin to reflect uncertainty in the market, to provide developers with a choice of sites and to account for some zoned sites being delayed in coming forward.
- 8.12 As identified in section 4.0, the total available employment land supply is 275.4ha. A broad comparison of the demand scenarios against the identified supply, as shown in Table 8.1, implies that LCCC would have more than sufficient employment space in quantitative terms up to 2032 to meet the needs arising from all of the scenarios considered. The potential surplus of employment land ranges from 230.6 ha to 262.8 ha depending upon the scenario.

Table 8.1 Demand/supply balance of B Class employment space (2017-2032)

	Baseline	Baseline with no “netting off” employment land (Sensitivity 1)	Baseline with no “netting off” jobs (Sensitivity 2)	Past trends (1993-2017)	Labour supply	Past completions
Need for B Class land (ha)	12.64	17.29	24.70	22.22	21.50	44.85
Available employment land (ha)	275.4					
Balance (ha)	+262.8	+258.1	+250.7	+253.2	+253.9	+230.6

Source: Lichfields analysis

- 8.13 As noted in section 4.0, the emerging LDP proposes to reallocate some land at Blaris Road/West Lisburn for mixed-use development, which would reduce the size of the employment allocation at this site to 50ha. This would have the effect of reducing the overall supply position to 220.4ha. This would result in the potential surplus of employment land reducing to between 175.6ha and 207.8ha, depending upon the scenario, but which would still significantly exceed the range of identified quantitative requirements.
- 8.14 In the context of the policy requirements under the SPPS and the RDS, the policy approach adopted by LCCC should aim to positively plan to support the employment needs of the LGD so that the local economy is not unduly constrained over the plan period but also recognise the issues around competing pressures on available development sites.
- 8.15 In order to ensure a flexible and responsive policy framework, it will be necessary to not just concentrate on meeting the forecast quantitative requirements for office and industrial space in

Lisburn & Castlereagh, which will fluctuate over time, but to reflect on the opportunities and risks that flow from particular policy approaches. This could include how the delivery of B class employment land can be prioritised in particular areas and for particular uses, reflecting market demand and economic potential, or to support sustainable development in the round.

- 8.16 The aim to attract inward investment appears to be a key priority for LCCC, so a focus for the zoning of employment could be to designate sites that have the greatest potential to deliver inward investment (for example, at West Lisburn). This approach would align with the Council's approach in the West Lisburn Development Framework (2018 Review).
- 8.17 The Council should also consider the scope to which existing legacy estates and sites are no longer productive for employment use and could be better placed to support non-B class employment uses in the future. In this case, sites such as MCH06 and LC10 have been zoned for employment for a number of years but have not come forward or are characterised by non-employment uses. It will be for LCCC to decide whether these sites are likely to come forward for employment or whether they should be redeveloped for other uses (or for a proportion of the site to be mixed-use), and if so, whether this would generate greater benefits for the LGD.

Distribution and Quality of Land Supply

- 8.18 The 30 main employment sites are focused on Lisburn City, Carryduff and areas close to the boundary with Belfast, including Newtownbreda. The assessment of these sites undertaken as part of this ELR demonstrates that this portfolio provides a range of good and average quality sites across the LGD, which are not limited to a particular geographical area. It is anticipated that these different locations will appeal to a range of different businesses and sectors.
- 8.19 The distribution of zoned employment sites will need to take into account the Council's wider spatial strategy for the LDP, including its settlement hierarchy and the balance of growth it is seeking to achieve across the area.
- 8.20 Having regard to comments received as part of the consultation, it will important to maintain sites with development potential in locations with good road and rail connectivity. A total of 11 of the sites assessed through this study scored a "3" in relation to this criterion. The inclusion of sites with strong road links will support the needs of the manufacturing, transportation and food sectors, which were noted as important to Lisburn & Castlereagh as part of the consultation process.
- 8.21 Further commentary on each key area is provided below.

Key Areas

Lisburn

- 8.22 Lisburn plays a key role within the in the LGD due to its location on the Belfast-Dublin corridor. It provides 11 existing employment sites, representing the largest cluster in the LGD. These sites offer a total of 148.72ha of available land, of which 93.74ha is proposed for employment use. Of the 6 sites in this area that were assessed, 2 were assessed as "good", 2 as "average" and 2 as "poor".
- 8.23 The growth of the service sector can be supported partly through the provision of mixed-use sites. It is noted that the part of the current Blaris Road/West Lisburn (LCO5) strategic site is proposed for reallocation for mixed-use development, which is likely to include community services and facilities alongside residential uses and would therefore contribute towards this objective.

- 8.24 As noted in the Planning Appeals Commission report on the proposed employment zonings in the BMAP 2015, Blaris Road/West Lisburn is a key site in a highly accessible location, and the proposed M1 – Knockmore Link would provide direct access to the strategic highway network. The draft BMAP 2015 identified this site as a Major Employment Location, which could accommodate the following uses:
- 1 Industrial and business use (use classes B1, B2, B3 and B4);
 - 2 Hotel and ancillary leisure facilities;
 - 3 School;
 - 4 Healthcare facilities (use class D1(a));
 - 5 Car showrooms;
 - 6 Open space; and,
 - 7 Small scale retail development to serve local needs.
- 8.25 Housing is not included in this list of acceptable uses. However, at the Inquiry the Department agreed with the objectors that the zoning should be for mixed use, comprising equal proportions of employment and residential development, with the provision of a linear park and large area of open space.
- 8.26 One of the reasons for this change was the fact that the delivery of the site is dependent on the delivery of the Knockmore Relief Road, which will need to be funded (at least in part) by development. Taking this factor together with the large supply of available employment land in Lisburn & Castlereagh, and the SPPS strategic objective to promote mixed-use development and improve integration between transport, economic development and other land uses, there would be justification for seeking a range of uses at this site if it can in turn secure delivery of the remaining allocated employment land.
- 8.27 New considerations for the future development of the West Lisburn site, post-BMAP include:
- 1 Provision of a Strategic Greenway (DfI – A Strategic Plan for Greenways, November 2016 and West Lisburn Development Framework, 2018 Review); and,
 - 2 Proposed new rail halt at Knockmore (subject to consideration of planning application S/2014/0884/F).
- 8.28 Whilst the assessment of West Lisburn/Blaris (Table 7.2 and Appendix 4) indicates the site as being “poor” it is noted that this situation would change significantly with the addition of the Knockmore Link Road and Rail Halt.

Derriaghy

- 8.29 The Derriaghy area forms part of the Lisburn Greater Urban Area and is located at the north of Lisburn & Castlereagh, near the border with Belfast. There are two proposed sites in the Derriaghy area (MLO5 and MLO6), one of which (MLO5) is assessed as “poor” and one as assessed as “good”. These two sites currently offer a total of 10ha of available land to accommodate development.
- 8.30 In terms of location, this area is well-placed to accommodate employment growth, with its proximity to Belfast, Lisburn and the Belfast-Dublin corridor. Market strength in this area is therefore likely to be strong.

Carryduff

- 8.31 Carryduff is located in the east of Lisburn & Castlereagh and offers a range of employment sites. This area is served by major road connections including the A24 Saintfield Road and A20 Newtownards Road. Whilst it does not offer the strategic links found in the Lisburn, Carryduff is an important location that can serve local employment needs.
- 8.32 A total of seven of the proposed employment sites are located in this area (CF05, CF06, CF07, CF08, CF09, CF10 and CF11), offering a total of 19.0ha of available land to accommodate development. Of the three sites that were assessed, two were classified as “good” (CF05 and CF09) and one as “poor”.

Newtownbreda

- 8.33 Located in the east of Lisburn & Castlereagh at the edge of Belfast, Newtownbreda offers another important location for employment. This area could serve local needs but also, in view of its proximity to Belfast, more strategic sites.
- 8.34 Four of the proposed employment sites are located in this area (MCH07, MCH08, MCH12 and MCH13). Of these sites, one (MCH12) was identified as “good” and the other three as “average” (MCH07, MCH08 and MCH12). The Knockbracken Healthcare Park (MCH13) site is identified in the West Lisburn Development Framework (2018) and represents a strategic zoning, with a total of 44.0ha of land remaining for development.

Dundonald

- 8.35 Dundonald is located at the north eastern edge of Lisburn & Castlereagh. It accommodates two proposed employment sites (MCH05 and MCH06), offering a total of 31.6ha of land remaining for development. These two sites were both assessed as of “average” quality. The market in this area is not particularly strong but the area can serve local needs in this part of the LGD, in connection with its proximity to the A20 (Upper Newtownards Road).

Appendix 1 Consultation feedback

The key issues and comments raised at the Invest Lisburn & Castlereagh Property Forum event in May 2019 and in questionnaire responses are summarised below:

Economic conditions

- The LCCC economy is fairly healthy, although improvements could be made;
- Economic conditions in LCCC are similar to elsewhere in NI: “challenging”, “sluggish activity” in 2019, reflecting uncertainty in relation to Brexit;
- Local concerns relate to availability of workforce and amenities for the workforce;
- Economic conditions are broadly quite good – but some areas could improve. LCCC estimated (using NISRA statistics from 2011) that over 70% of 16-64 year olds living in the borough were economically active – but in comparison Ards and North Down suggest that 78% of their population are economically active (The Big Plan).

Supply of employment land

- No particular concerns in relation to current supply of employment land; however, it is not necessarily of the right type or in the right location.

Location

- Existing employment land is not necessarily in the right locations;
- More economically viable employment land locations are needed, regardless of former zonings;
- Employment land needs to be near road infrastructure; motorway corridors are key;
- Demand is focused along the Belfast-Dublin corridor (A1) (Lisburn is a prime location) and in proximity to the Port of Belfast/City Airport (Castlereagh is well-located for the Port and City Airport);
- Much of the industrial land is focused on Lissue, where transport and accessibility remain an issue;
- Mixed use sites will be best in Castlereagh East;
- West Blaris is strategically extremely well linked with both Dublin and Belfast and could provide space for larger industrial sites;
- High bay warehousing development should be located so as to promote Lisburn’s strategic location between Belfast and Dublin;
- The link road between Knockmore and the M1 Motorway is a key factor in opening up Lissue to larger scale employment opportunities;
- The Altona Industrial Estate is very much constrained by its location and constrained by further development;
- Much of the industrial land at Castlereagh may not be suitable for large scale employers due to lack of immediate access to the Motorway network;
- Realistically LCCC is well placed geographically to ensure that all areas are growing economically.

Sectors

- The manufacturing sector in LCCC is quite healthy and could outperform the OE forecast (which indicates a 17.7% loss of employment between 2017 and 2032);
- There are large manufacturing and transportation companies in LCCC, which appear to be doing well;
- Global conditions indicate that growth in manufacturing is unlikely;

- Other identified sectors/types of business for growth: distribution; office workspace/flexible space; owner-occupied industrial; food businesses;
- There is a need to continue to support the key private sector employers in the area, including Coca Cola, and Decora;
- There is a need to increase focus on high technology, renewable engineering and energy uses;
- The OE forecast of 6.8% growth of retail jobs in LCCC (2017 to 2032) seems too high;
- Over 80% of businesses in LCCC are in the service sector – this suggests that massive industrial parks are not required and mixed use are more likely to succeed for both developers and businesses. In comparison, Ards and North Down have only 67% service sector businesses.

Types of land/premises

- There have been very few recent enquiries for industrial premises;
- Lack of availability of appropriate industrial land;
- There has been no warehousing development in recent years;
- There is a need for large scale logistics space / particular focus should be placed on facilitating high bay warehousing to meet requirements of distribution sector;
- Existing employment premises are not necessarily of the right type (e.g. a current lack of premises with 8-10m height);
- There is a need for large floorplate offices;
- There is a need for land for offices to be ready within a short turnaround time.

Challenges/barriers

- Traffic problems/transport issues/links to major hubs are a barrier to take-up of employment land;
- There is a need to take stock of existing employment sites and to address current vacancy rates;
- There is a need to make the availability of employment land more well-known – a PR issue;
- There is the historic context of separate economic strategies for the two former boroughs that have now merged, which should be aligned for the benefit of the whole area;
- Business rates.

Other

- It is cheaper to refurbish existing premises than build new;
- Additional housing will mean additional population; it is important to consider how to keep people in jobs in the LCCC area.

Appendix 2 Sector Definitions and Land Use Categories

Sector Definitions and Land Use Categories

Oxford Economics	SIC Codes	B1	B2/B3	B4	Non-B	
A	Agriculture, forestry and fishing	0111-0322	0.00%	0.00%	0.00%	100.00%
B	Mining and quarrying	0510-0990	0.00%	0.00%	0.00%	100.00%
C	Manufacturing	1001-3320	0.00%	100.00%	0.00%	0.00%
D	Electricity, gas, steam and air conditioning supply	3511-3530	0.00%	0.00%	0.00%	100.00%
E	Water supply; sewerage, waste management and remediation activities	3600-3900	0.00%	0.00%	0.00%	100.00%
F	Construction	4110-4399	0.00%	27.56%	0.00%	72.44%
G	Wholesale and retail trade; repair of motor vehicles and motorcycles	4511-4799	0.00%	3.16%	19.30%	77.54%
H	Transportation and storage	4910-5320	0.00%	0.00%	68.31%	31.69%
I	Accommodation and food service activities	5510-5630	0.00%	0.00%	0.00%	100.00%
J	Information and communication	5811-6399	69.41%	0.00%	0.00%	30.59%
K	Financial and insurance activities	6411-6630	100.00%	0.00%	0.00%	0.00%
L	Real estate activities	6810-6832	100.00%	0.00%	0.00%	0.00%
M	Professional, scientific and technical activities	6910-7500	94.65%	0.00%	0.00%	5.35%
N	Administrative and support service activities	7711-8299	97.74%	0.00%	0.00%	2.26%
O	Public administration and defence	8411-8430, 9900	60.62%	0.00%	0.00%	39.38%
P	Education	8510-8560	0.00%	0.00%	0.00%	100.00%
Q	Human health and social work activities	8610-8899	0.00%	0.00%	0.00%	100.00%
R	Arts, entertainment and recreation	9001-9329	0.00%	0.00%	0.00%	100.00%
S	Other service activities	9411-9820	0.00%	0.00%	0.00%	100.00%

Source: Oxford Economics / NI Business Register and Employment Survey (September 2017) / Lichfields analysis

Appendix 3 Site Assessment Matrix

Criteria	Poor (1)	Average (2)	Good (3)
Road access	Access problematic and constrains the development, e.g. Difficult / narrow access via roads that are unsuited to high traffic flows; sloping / bending access roads; difficult site junction; high level of congestion	Good access – minor constraints exist	High quality access with no constraints via generally free moving, good quality roads; generally limited level of congestion and unconstrained junctions
Public transport Access	Site more than 500m from existing public transport services	Public transport services located on or adjacent to the site with at least hourly services to/from a town centre	Public transport services located on or adjacent to site with regular services and 5 min or less journey time to a town centre
Pedestrian / cycle access	Limited pedestrian and cycle facilities in the vicinity of the site at present and potential difficulties in providing enhancement (i.e. due to access difficulties or restricted carriageway with creating restricting opportunity to extend cycle lane)	Reasonable existing pedestrian and cycle facilities in the vicinity of the site	Reasonable and safe existing pedestrian and cycle access to the site
Proximity to residential areas and community facilities	Site located more than 500m from existing small village/residential area or community facilities	Site located within 500m of large village/residential area or community services	Site located within 500m of a significant existing residential area and community services
Brownfield / greenfield status (undeveloped area only)	Site predominantly greenfield (more than 75%)	Roughly 50/50 brownfield / greenfield	Site predominantly brownfield (more than 75%)

Criteria	Poor (1)	Average (2)	Good (3)
Adjoining uses	Development of site for B Class purposes likely to be adversely affected by or affect surrounding uses or is in open countryside away from any forms of development	Site on edge of urban area, adjoining uses that would neither adversely affect nor be adversely affected by B Class development	Site within existing urban area, adjoining uses that would neither adversely affect nor be adversely affected by B Class development or is immediately adjacent to an existing employment site, which would provide clustering benefits
Proximity to Infrastructure	Site is some distance from utility infrastructure, or utility infrastructure is available in the area and access could be provided although not necessarily easily	Utility infrastructure available within reasonable distance (100m) of the site and provision is realistically available	Good range of infrastructure already available within the vicinity of the site and provision is realistically available
Landscape and environmental designations	Site is within or in proximity to an area with a landscape or environmental designation that would represent a minor or major constraint on development	Landscape or environmental sensitivity issues would need to be addressed but would not constrain development of the site	No landscape or environmental designation on or affecting the site
TPOs	Large number of TPOs on site	Limited number of TPOs on site but taken account of through design and layout	Limited number / no TPOs on the site but no impact upon development
Topography	Change in levels is likely to represent a constraint for development	Irregular topography will have implications upon development which can be overcome through design and engineering solutions	Generally level site with no constraints upon development arising from topography
Flood risk	A significant part of the site is in the present day river, coastal or surface water flood plain as defined in the NI Department for Infrastructure Flood Maps	More than (approx.) 15% of the site is in the present day river, coastal or surface water flood plain as defined in the NI Department for Infrastructure Flood Maps but this is unlikely to constrain development	Less than (approx.) 15% of the site is in the present day river, coastal or surface water flood plain as defined in the NI Department for Infrastructure Flood Maps and this is unlikely to constrain development

Criteria	Poor (1)	Average (2)	Good (3)
Market strength	Limited market demand undermines likelihood of development / continuing operation as an employment site	Strength of market demand unlikely to undermine likelihood of development / continuing operation as an employment site	Market demand likely to encourage development / high market demand
Overall comments	Summary of the key attributes of the site and conclusion on its suitability for employment use		

Appendix 4 Site Assessments

Site Address: Blaris Road, Lisburn			
Site Ref: LC05	Location: South west of Lisburn	Nearest Settlement: Lisburn	Total area: 119.47ha Developed area: 14.49ha Remaining area: 104.98ha, of which 60.0ha available for employment use
Criteria	Comment		Score
Road Access	The scheme is reliant on the construction of the Knockmore Relief Road, connecting the M1 at Sprucefield to the A3 at Knockmore Road. Access to the site could be from Blaris Road and/or from new/altered junctions from the M1 and/or A3.		1
Public Transport Access	Existing bus services available on Moira Road (A3), approx. 1km from the centre of the site, providing hourly services to Belfast and Craigavon. Additional bus services could be provided in future to serve the new development and would be supported by the development.		1
Pedestrian/Cycle access	No existing pedestrian/cycle access, with no pedestrian/cycle paths on Blaris Road.		1
Proximity to residential areas and community facilities	Residential areas to the north of Moira Road and to the north east of the site, across the River Lagan (approx. 1km from the centre of the site). Access to community facilities reliant on the construction of the Knockmore Relief Road. Community facilities that could be accessed following the completion of this road include a primary school (approx. 1.1km) and a supermarket (2.5km). Additional services could be provided in future to serve the new development and would be supported by the development.		1
Brown/Greenfield status	112.2ha greenfield out of a total of 119.48ha (94% greenfield).		1
Adjoining Uses	River to the north and north east, with fields and industrial uses to the other side of the river to the north and residential uses to the north east. Cemetery and some residential to the east. M1 to the south. Fields to the west. There is a scheduled monument (graveyard) at the centre of the site.		3

Proximity to Infrastructure	Unknown but likely to be poor	1
Landscape and environmental designations	The site's eastern boundary adjoins in part and is in proximity (approx. 40m) to Site of Local Nature Conservation Importance (BMAP 2015) – Ref. LC20/12 and Area of Constraint on Mineral Development (Draft BMAP) – Ref. LN03/22. Site's eastern boundary is in proximity (approx. 430m) to Lagan Valley Regional Park. Site's northern boundary adjoins Local Landscape Policy Area: LC21 Knockmore, Lisburn City. The site is not within a LCCC Landscape Wedge.	2
TPOs	No TPOs on or adjoining site.	3
Topography	The site slopes gently downhill from the centre of the site to the river on the north and east boundaries.	3
Flood Risk	Site's eastern boundary adjoins the extent of Dec 1978 flood. The site is not within the present day sea floodplain but is within the present day river floodplain (estimated to be less than 5% of the site) and the present day surface water floodplain (estimated to be less than 5% of site).	3
Market strength	There is market interest in development of the site for mixed-use, including both residential and employment uses, as evidenced by planning application LA05/2018/1154/O. Site first zoned for employment in the (unadopted) BMAP 2015.	3
Overall comments	Development of this strategic site is reliant on / will need to link to the construction of the Knockmore Relief Road. The scale of the site means that additional services could be provided in future to serve the new development and would be supported by the development. Pedestrian, cycle and public transport links could also be provided as part of the development. Whilst the site is not currently well-connected by road (as reflected in the scoring), the development of the link road would mean that the site is in a prime location for access to the M1 and A3. The site could be suitable for a range of uses, and owing to its size, could support mixed-use development as well as employment land uses.	23

Site Address: Knockbracken Healthcare Park, Saintfield Road, Castlereagh			
Site Ref: MCH13	Location: Edge of Belfast	Nearest Settlement: Newtownbreda	Total area: 85.54 Developed area: 41.53ha Remaining: 44.01ha
Criteria	Comment		Score
Road Access	Main site entrance is on the A24. There is another entrance off Alderwood Hill (west of site) where there is an equestrian centre associated with a farm.		3
Public Transport Access	Nearest bus stop approx. 100m from the site entrance on the A24. Services approx. every 20 minutes to Belfast. Cairnshill Park & Ride located approx. 0.8km from the site entrance. Services approx. every 15 minutes to Belfast. No railway station in the vicinity.		2
Pedestrian/Cycle access	Shared pedestrian and cycle path either side of A24, leading to the site access.		3
Proximity to residential areas and community facilities	Residential area to the north of the site, in Newtownbreda / the southern outskirts of the wider urban area of Belfast. Nearest community facilities include a primary school, nursery and café (all approx. 0.9km).		2
Brown/Greenfield status	43.33ha greenfield out of a total of 85.54ha (51% greenfield).		2
Adjoining Uses	Fields and small amount of residential to the north, A24 to the east (with mix of residential and fields on the other side of the road), and fields to the south and west.		2
Proximity to Infrastructure	Existing employment uses on the site, so utilities infrastructure is likely to be available. However, this has not been confirmed.		3
Landscape and environmental designations	The south and west boundaries of the site adjoin an Area of High Scenic Value (BMAP 2015) – Ref. COU5/07. The site is completely within an Area of Outstanding Natural Beauty (Lagan Valley). The western section of the site (approx. 20% of the site area) is within a Historic Park, Garden or Demesne (BMAP 2015) – Ref. CR/HPGD01.		1

	<p>The site is within a Site of Local Nature Conservation Importance (BMAP 2015) – MCH 28/15. The southern site boundary is within a Site of Local Nature Conservation Importance (BMAP 2015) – MCH 28/14. These areas cover approx. less than 10% of the site.</p> <p>The southern and western site boundaries adjoin an Area of Constraint on Mineral Developments (Draft BMAP 2015) – Ref. CR07/21. The site adjoins Area of Constraint on Mineral Developments (Draft BMAP 2015) – Ref. COU8/07.</p> <p>The western site boundary is in proximity (280m) of Local Landscape Policy Area: PN02 Purdysburn.</p> <p>The south east boundary of the site adjoins a LCCC Landscape Wedge.</p>	
TPOs	The entire site is with a TPO area. However, development could be planned around TPO constraints.	2
Topography	Contours indicate that the site is undulating across the site with significant changes in elevation.	1
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain but is within the present day surface water floodplain (estimated to be less than 10% of site).	3
Market strength	A pre-application advice request was submitted for an extension to the residential part of the zoning known as Millburn Close for social housing (Y/2014/0361/PREAPP). However, there is no evidence of market interest in development of the site for employment uses. Site first zoned for employment in the (unadopted) BMAP (2014).	1
Overall comments	<p>The site includes a wide range of building types and ages, in varying states of repair, many of which could be redeveloped – although this would add cost. There is also ample space for development in and around existing buildings.</p> <p>The site is well-located for road and pedestrian/cycle access and benefits from regular bus services to Belfast.</p> <p>Given the nature of the site as a healthcare park, there could be opportunities for additional healthcare-related facilities, services and complementary uses, falling in the B1-B3 uses. However, there is no evidence of market interest.</p>	25

Site Address: Lissue Road, Lisburn City			
Site Ref: LC07	Location: Lisburn	Nearest Settlement: Lisburn	Total area: 14.34ha Developed: 3.48ha Remaining: 10.86ha
Criteria	Comment		Score
Road Access	Measured from the south east corner of the site, the site is approx. 0.8km from Moira Road (A3). The site would need to be accessed from Lissue Road. To the north of the Coca Cola plant the road gradually narrows, becoming a single lane.		2
Public Transport Access	Nearest bus stops approx. 1km away on Moira Road (A3). There are hourly services to Belfast and Craigavon. Lisburn railway station is approx. 5km away and Moira railway station is approx. 6km away.		2
Pedestrian/Cycle access	No pedestrian footway connecting to the site. Pedestrian footway extends from Moira Road to entrance to Coca Cola plant. No cycleway in vicinity of the site.		1
Proximity to residential areas and community facilities	4 residential dwellings and farm buildings within the site. No large residential areas in the vicinity. Café approx. 1.2km and pub approx. 1.5km away.		1
Brown/Greenfield status	Undeveloped area of site: Greenfield		1
Adjoining Uses	Railway to the north east. Coca Cola plant to the south. Lissue Road to the west, with agricultural fields on the west side of Lissue Road. 4 residential dwellings and farm buildings within the site.		2
Proximity to Infrastructure	Existing employment use at the Coca Cola site to the south indicates that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	North corner of site is adjacent to end of Local Landscape Policy Area LC23: Lissue, Lisburn City (BMAP 2015). Site in proximity (approx. 220m) to Area of Constraint on Mineral Developments (Draft BMAP 2015) – Ref. LN 03/18. Site in proximity (approx. 220m) to Site of Local Nature Conservation Importance (BMAP 2015) – Ref. LC 20/08. The site is not within a LCCC Landscape Wedge.		2
TPOs	No TPOs on or adjoining site.		3
Topography	The site is predominately flat with minimal change in elevation.		3

Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea floodplain but is within the present day rivers and surface water floodplain (estimated to be less than 20% of site).	1
Market strength	No evidence of market interest and no planning history in relation to undeveloped area of site. Site first zoned for employment in the (unadopted) BMAP (2014).	1
Overall Comments	The site is located adjacent to the Coca Cola plant and close to the A3. Access to public transport and pedestrian access is poor. The existing farm and residential dwellings onsite may restrict development to some extent. There is no evidence of current market interest in the site. If these points were addressed, the site could be suitable for manufacturing or distribution uses.	22

Site Address: Knockmore Hill/Business Park, Ballinderry Road/Knockmore Road, Lisburn City			
Site Ref: LC09	Location: Lisburn	Nearest Settlement: Lisburn	Total area: 44.30 Developed: 26.56ha Remaining: 17.74ha
Criteria	Comment		Score
Road Access	The site is accessed from Ballinderry Road, off Knockmore Road. The access to the site is approx. 1km from the A3.		3
Public Transport Access	The nearest bus stops are less than 100m from the access to the site on Ballinderry Road and approx. 300m from the site access on Knockmore Road. There are hourly services to Lisburn and Antrim. Lisburn railway station is approx. 4km away and Moira railway station is approx. 7km away.		2
Pedestrian/Cycle access	Pedestrian footways on Ballinderry Road. Shared pedestrian/cycle lane on Knockmore Road.		3
Proximity to residential areas and community facilities	Residential areas on north side of Ballinderry Road and along Knockmore Road. Laurel Hill Community College approx. 1.5km away and Kilowen Primary School approx. 1.8km away, both on Prince William Road (A30). SuperValu supermarket approx. 1km away.		3

Brown/Greenfield status	Area of site with existing buildings: Brownfield (23.63ha) (53%). Undeveloped area of site: Greenfield (20.67ha) (47%).	2
Adjoining Uses	Railway line to the south west. Derelict hospital building at Lissue House and agricultural land to the north-west. Ballinderry Road to the north, with residential use on the north side of the road. Knockmore Road to the east, with residential use on the east side of the road. Solar farm on north side of Ballinderry Road visible to north west.	3
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.	3
Landscape/Heritage Sensitivity and environmental designations	Proximity to and visibility from the (derelict) former hospital, Lissue House, a listed building/grounds/Local Landscape Policy Area (LLPA). The site's northern boundary adjoins a Local Landscape Policy Area: LC23 Lissue, Lisburn City, Site of Local Nature Conservation Importance (BMAP 2015) – Ref. LC20/08, and an Area of Constraint on Mineral Development (Draft BMAP 2015) – Ref. LN03/18. The site's eastern boundary is in proximity (approx. 140m) to Area of Constraint on Mineral Development (Draft BMAP) – Ref. LN03/11. The southern site boundary is in proximity (approx. 290m) from Local Landscape Policy Area: LC21 Knockmore, Lisburn City. The site is not within a LCCC Landscape Wedge.	1
TPOs	There are TPOs next to the road at the site's northern boundary.	2
Topography	Undulating, with land rising up to the (derelict) former hospital, Lissue House.	2
Flood Risk	A culvert has already been installed at the access to the undeveloped half of the site. Site is outside extent of Dec 1978 flood. The site is not within the present day sea floodplain but is within the present day river floodplain (estimated to be less than 10% of the site) and is within the present day surface water floodplain (estimated to be less than 5% of site).	3
Market strength	Recent planning history demonstrates demand for units at the site, as reported in the Employment Land Monitor. However, these applications are understood to apply to the developed area of the site and not the greenfield area of land to the west (approaching Lissue House). Low vacancy at existing premises. The Employment Land Monitor states that a single unit in the south-east corner of the site was vacant. However, there was a CLUD application LA05/2018/1104/LDP for the proposed operation of workshop repairs and servicing, storage of machines, engines and parts, and the sale of machines for this site. It is understood from discussions with planning officers that the half of the site that is already developed is owned and managed by Invest NI. The undeveloped half of the site is privately owned but is managed by Invest NI. The site is currently available and is being marketed by CBRE. Site first zoned for employment in the Lisburn Area Plan (2001).	3

Overall comments	Whilst the developed half of the industrial estate/business park is well-established, the undeveloped portion may be less attractive to the market on account of its undulating topography, the potential constraints on development posed by the proximity to the listed building, Lissue House, and the Local Landscape Policy Area. However, the site does benefit from clustering effects of existing businesses. This area could be suitable for B2/3/4 uses.	30
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Site Address: Dundonald Industrial Estate/Inspire Business Centre, Carrowreagh / Land at Upper Newtownards			
Site Ref: MCH06	Location: Dundonald	Nearest Settlement: Dundonald	Total area: 34.90ha Developed: 11.82ha Remaining: 23.08ha
Criteria	Comment	Score	
Road Access	The southern part of the site, which includes the Dundonald Industrial Estate and the land formerly occupied by the Rolls Royce factory, is accessed from Ballyoran Lane. The central section, which includes Carrowreagh Business Park and the Inspire Business Centre, is accessed from Carrowreagh Road. The greenfield area at the north of the site could be accessed from either/both Ballyoran Lane and/or Carrowreagh Road. Ballyoran Lane and Carrowreagh Road adjoin the A20, which forms the southern border of the site.	3	
Public Transport Access	Nearest bus stop is adjacent to the site on the A20. Services to Belfast approx. every 30 minutes. No railway station in the vicinity.	2	
Pedestrian/Cycle access	Pedestrian footways on Ballyoran Lane and Carrowreagh Road. Shared pedestrian/cycle paths on the A20.	3	
Proximity to residential areas	Residential area immediately to the east of Carrowreagh Road.	3	

and community facilities	Community facilities include a gym within the site, Dundonald High School immediately to the west of the site, a primary school to the south of Upper Newtownards Road (approx. 500m away), a supermarket (approx. 1km away) and Ulster Hospital (including A&E) (approx. 1.6km).	
Brown/Greenfield status	15.78ha greenfield out of a total of 34.93ha (45% greenfield).	2
Adjoining Uses	Fields and farm buildings to the north. Carrowreagh Road to the east with residential use on the other side of the road. The A20 to the south with mainly residential on the other side of the road. Dundonald High School to the west.	2
Proximity to Infrastructure	Existing employment use indicates that utility infrastructure is likely to be available, although this has not been confirmed.	3
Landscape and environmental designations	Site's northern boundary adjoins Area of High Scenic Value (BMAP 2015) - Ref. COU5/09 and Area of Constraint on Mineral Developments (Draft BMAP 2015) – Ref. COU8/09. Northern boundary is in proximity (approx. 90m) to ASSI – Ref. ASSI164. Site is within Site of Local Nature Conservation Importance (BMAP) – Ref. MCH28/05 (estimated to be less than 5% of site) and Area of Constraint on Mineral Developments (Draft BMAP 2015) - Ref. CR07/11. Site is within Local Landscape Policy Area: MCH33 Dunlady Glen (estimated to be less than 5% of site). The site is not within an LCCC Landscape Wedge.	2
TPOs	No TPOs on or adjoining site.	3
Topography	Undulating site. Contours indicate that the site slopes uphill to the north east, with 30m elevation gain over 300m distance.	1
Flood Risk (mapping)	Site is outside extent of Dec 1978 flood. The site is not within the present day sea floodplain but adjoins the present day river floodplain and is within the present day surface water floodplain (estimated to be less than 20% of site).	2
Market strength	No evidence of market interest in additional employment use at the site. The former Rolls Royce factory site (now cleared), which extends to approx. 7ha, is owned by Lagmar Properties Limited. The site has been vacant since the closure of the factory in 2005. This area has been subject to market interest in residential-led mixed-use development, including a neighbourhood centre (LA05/2017/1206/O – subsequently withdrawn) and in the past has been subject to interest for retail development (Y/2010/0087/O and LA05/2015/0444/PAD). It is understood that a new residential-led application is being prepared. The greenfield area in the north of the site has remained undeveloped since being zoned in the Belfast Area Plan 2001. There are numerous vacant units within the Inspire Business Centre, which forms part of the site. A change of use to D1 (gymnastics club) has been permitted for one existing unit at the site. Site first zoned for employment in the Belfast Urban Area Plan (2001).	1

Overall comments	<p>There are a range of uses within, neighbouring and in proximity to the site, including the Inspire Business Park, the Lloyds banking office, Dundonald High School and the established residential area and community facilities.</p> <p>The site may be suitable for development for a range of B1-B3 uses, although it appears that market interest in employment uses is low.</p>	27
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Site Address: Forster Green, Saintfield Road, Castlereagh			
Site Ref: MCH12	Location: Knockbreda, Castlereagh	Nearest Settlement: Castlereagh	Total area: 2.54ha Developed: 2.34ha Remaining: 0.20ha
Criteria	Comment		Score
Road Access	Site can be accessed from both Glencregagh Road, just off the A55 (entrance and exit), and the A24 (entrance only). Parking is a problem onsite currently, as there is insufficient provision in the space available.		2
Public Transport Access	Nearest bus stops on A55 and A24, within 200m of the site entrance. Services to Belfast every 10 minutes.		3
Pedestrian/Cycle access	Pedestrian footways along the A55 and A24, providing access to the site. No cycleways.		2
Proximity to residential areas and community facilities	Nearest residential areas are immediately to the north east of Glencregagh Road and approx. 100m to the south of the site, separated by fields. Nearest community facilities include the Forestside Shopping Centre immediately to the north west of the A55, which accommodates comparison goods stores, a café, a supermarket and a pharmacy.		3
Brown/Greenfield status	Brownfield		3
Adjoining Uses	Residential to the north, fields/parkland to the east and south, the A24/A55 to the west, with the Forestside Shopping Centre on the other side of the A55.		2

Proximity to Infrastructure	Existing employment use indicates that utility infrastructure is likely to be available, although this has not been confirmed.	3
Landscape and environmental designations	Site eastern boundary is in proximity (approx. 90m) from Area of High Scenic Value (BMAP 2015) – Ref. COU 5/08: Castlereagh Escarpment. Site's south eastern boundary is in proximity (approx. 290m) from Area of Outstanding Natural Beauty (Lagan Valley), Lagan Valley Regional Park (BMAP 2015) and Site of Local Nature Conservation Importance (BMAP 2015) – Ref. MCH 28/03. Site is in proximity to Constraint on Mineral Developments (Draft BMAP) approx. 90m east of site boundary (Ref COU 8/08) and 290m west of site boundary (COU 8/10). Site's southern and western boundaries are adjoining Local Landscape Policy Area MCH34: Forster Green (BMAP 2015), Site of Local Conservation Importance (BMAP 2015) – Ref. MCH 28/09 and Area of Constraint on Mineral Developments (Draft BMAP 2015) – Ref. CR07/15. Site's eastern boundary is in proximity (approx. 90m) from LCCC Landscape Wedge.	2
TPOs	No TPOs on or adjoining site.	3
Topography	Site is on a steep slope, sloping downhill to north. Approx. 20m elevation change over 50m distance.	1
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain but is within the present day surface water floodplain (estimated to be less than 5% of site).	3
Market strength	There is no evidence of interest in development of the site. The derelict healthcare buildings onsite will add cost to future development of the site. Site first zoned for employment in the (unadopted) BMAP (2014).	1
Overall comments	The site is well-located for access to residential areas and community facilities and benefits from frequent bus services to Belfast. However, the derelict buildings onsite will add to the cost of development (which is not reflected in the scoring) and the site is steeply sloping. There is no evidence of market interest in the site. The site could be suitable for B1-B2 uses.	28

Site Address: Cyril Johnston & Co, Ballynahinch Road, Carryduff			
Site Ref: CF05	Location: Carryduff	Nearest Settlement: Carryduff	Total area: 11.74ha Developed: 0.45ha Remaining: 11.29ha
Criteria	Comment		Score
Road Access	Site accessed from the A24.		3
Public Transport Access	Nearest bus stop on the A24, next to the site. Services to Belfast every 10-15 minutes. No railway station in the vicinity.		3
Pedestrian/Cycle access	Pedestrian footway adjacent to the site along the A24. No cycleway in the vicinity.		2
Proximity to residential areas and community facilities	There is a residential area adjacent to the northern portion of the site, forming the southern part of Carryduff. There is a hairdresser in the adjoining employment site (CF07). Community facilities in Carryduff include a pharmacy (approx. 1.1km), library (1.4km), a convenience store (1.7km) and a primary school (1.6km).		2
Brown/Greenfield status	10.51ha greenfield out of a total of 11.74ha (90% greenfield).		1
Adjoining Uses	Site wraps around employment site ref. CF07 to the east and adjoins the A24 to the south of CF07. Fields to the south and west. Residential to the north and east of the northern part of the site.		2
Proximity to Infrastructure	Adjacent to existing employment and residential uses, so utilities infrastructure is likely to be available. However, this has not been confirmed.		2
Landscape and environmental designations	Site in proximity (approx. 420m) to Local Landscape Policy Area CF18 South East Carryduff, Carryduff (BMAP 2015). Site is in proximity (approx. 220m) of Area of Constraint on Mineral Developments – Ref. LN 03/81 (Draft BMAP 2015). Site is in proximity (approx. 220m) to Site of Local Nature Conservation Importance (BMAP 2015) – Ref. LN01/47. The site is not within a LCCC Landscape Wedge.		2

TPOs	No TPOs on or adjoining site.	3
Topography	The site is predominately flat with minimal change in elevation.	3
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea floodplain or river floodplain but is within the present day surface water floodplain (estimated to be less than 10% of site).	3
Market strength	<p>There has been interest in development of office and light industrial units at the southern portion of CF05: LA05/2016/0593/PAD - Creation of office and light industrial units.</p> <p>The site adjoins existing employment land (CF07), which is in use. The main use on this neighbouring site is a plant and equipment hire business but this site has also lost employment land to retail (garden centre) and hairdressing uses in recent years. This indicates pressure for other uses.</p> <p>Site first zoned for employment in the (unadopted) BMAP (2014).</p>	3
Overall comments	This predominantly greenfield site adjoins existing employment land at CF07, which is completely built out. The site is well-located on the A24 and benefits from regular bus services to Belfast. Market strength appears to be good, although there is pressure for non-employment uses at the site.	29

Site Address: Lands at Comber Road, Carryduff			
Site Ref: CF06	Location: Edge of Carryduff	Nearest Settlement: Carryduff	Total area: 5.55ha Developed: 0.29ha Remaining: 5.26ha
Criteria	Comment		Score
Road Access	Site accessed from Comber Road (B178), 0.7km to the east of the A7.		2
Public Transport Access	Nearest bus stop is approx. 0.7km away on Saintfield Road (A7). There are hourly services to Belfast and Downpatrick.		2
Pedestrian/Cycle access	Pedestrian footpath both sides of Comber Road from the A7 to Edgar Road. The path on the south side of the road ends at Edgar Road and does not connect to the site. No cycleway in the vicinity.		1
Proximity to residential areas and community facilities	Nearest residential area approx. 0.7km away, to the west of the A7. Nearest community facilities in Carryduff include a convenience store (1.3km), pharmacy (1.3km), library (1km) and a primary school (0.9km). A mixed-use development including 380 dwellings and mixed-use centre is currently under construction opposite the site on Comber Road (ref Y/2009/0160/F). The mixed-use centre is to include a community facility, two retail units and a coffee shop. Planning permission has also been granted for a scheme of 85 homes to the east of this mixed-use development on Comber Road (ref LA05/2016/1062/O).		3
Brown/Greenfield status	5.28ha greenfield out of a total of 5.55ha (95% greenfield).		1
Adjoining Uses	Existing employment uses to the west, Comber Road to the north, fields to the east and south.		2
Proximity to Infrastructure	Adjacent to existing employment uses, so utilities infrastructure is likely to be available. However, this has not been confirmed.		3
Landscape and environmental designations	North west corner of site is in proximity (approx. 340m) Local Landscape Policy Area CF15: Comber Road, Carryduff (BMAP 2015).		2

	The site is not within a LCCC Landscape Wedge.	
TPOs	No TPOs on or adjoining site.	3
Topography	The LCCC Employment Land Monitor states that land in the western half of the site raised above street level by 1.5-2m and will require some excavation. The majority of the site is flat but slopes uphill in the western half.	2
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain but is within the present day surface water floodplain (estimated to be less than 20% of site).	2
Market strength	Limited interest in development of the site, aside from a pre-application discussion request submitted in 2017 (LA05/2017/0654/PAD) for relocation of workshop and sales showroom. Site first zoned for employment in the (unadopted) BMAP (2014).	1
Overall comments	The site adjoins existing employment land (CF08) but there has been limited market interest in development of the site. It is located on a B road and comprises greenfield land. Access to residential areas and community facilities is currently not particularly strong but the new development under construction on the other side of the road will help to provide this. The site could be suitable for B1-B3 uses.	24

Site Address: Land North West of Gobra Road, Glenavy			
Site Ref: GY05	Location: Glenavy	Nearest Settlement: Glenavy	Total area: 6.27ha Developed: 0ha Remaining: 6.27ha
Criteria	Comment		Score
Road Access	This site is accessed off Gobra Road, which is fairly narrow. However, the site is located only approx. 300m from the A26.		2
Public Transport Access	Nearest bus stop is approx. 300m away on Crumlin Road. There are half-hourly services to Crumlin and services to Belfast and Lisburn (less frequent than hourly). Aldermore railway station is approx. 9km away.		2
Pedestrian/Cycle access	No pedestrian footpath along Gobra Road near the site. No cycleway in the vicinity.		1
Proximity to residential areas and community facilities	Residential area adjacent to the site, to the south. Community facilities in the village within 1km of the site, including a GP surgery, pharmacy, restaurant and bar, and Spar shop/petrol station.		1
Brown/Greenfield status	Greenfield		1
Adjoining Uses	Agricultural use to the north west. Private lane with farm buildings to the north to the north east (which forms the District boundary) and a dwelling to the south of the farm buildings. Gobra Road to the south east with fields on the east side of the road. Residential use to the south west.		1
Proximity to Infrastructure	Adjacent to residential use and farm buildings, so utilities infrastructure is likely to be available. However, this has not been confirmed.		2
Landscape and environmental designations (new sites only)	South corner of site is in proximity (approx.120m) to Area of Village Character GY08 Glenavy (BMAP 2015) and in proximity (approx. 100m) to Local Landscape Policy Area GY07: Glenavy River Corridor, Glenavy. Site is within proximity (approx. 200m) of Local Landscape Policy Area GY06: Crumlin Road, Glenavy.		2

	Site is not within a LCCC Landscape Wedge.	
TPOs	No TPOs on or adjoining site.	3
Topography	The site is predominately flat with minimal change in elevation.	3
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea, river or surface water floodplain.	3
Market strength	No interest in terms of applications in over a decade. Prior to the release of the draft BMAP in November 2004 there was some interest in the site for housing (S/2003/0597/Q). Site first zoned for employment in the (unadopted) BMAP (2014).	1
Overall comments	This greenfield site is in a rural location and adjoins a residential area at the northern edge of the village of Glenavy. The site is accessed from Gobrana Road, which is fairly narrow, but is only approx. 300m from the A26. The site could be suitable for business (B1) or light industrial use (B2).	22

Site Address: Glenavy Road, Moira			
Site Ref: LN07	Location: Near Moira	Nearest Settlement: Moira	Total area: 24.06ha Developed area: 12.26ha Remaining area: 11.8ha
Criteria	Comment		Score
Road Access	Site accessed off the A26. Secondary access off Soldierstown Road (it is not known whether this is in use).		3
Public Transport Access	Nearest bus stop approx. 400m from site on Soldierstown Road, with limited services to Aghalee and Lisburn. Moira railway station is approx. 1.6km from the site.		1
Pedestrian/Cycle access	No pedestrian footpath along the A26 aside from immediately outside the entrance to the site. No cycleway.		1
Proximity to residential areas and community facilities	No residential areas or community facilities in proximity.		1
Brown/Greenfield status	Brownfield		3
Adjoining Uses	A26 to the east, with agricultural use to the east side of the road. Agricultural uses to the north, west and south. 2 dwellings to the south on secondary access road off Soldierstown Road (it is not known whether this access road is used).		3
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	West corner of site is in proximity (approx. 330m) to Site of Local Nature Conservation Importance (BMAP 2015) – Ref. AG 04/02 and Area of Constraint on Mineral Developments (Draft BMAP 2015) – Ref. LN 03/114. Eastern boundary of site is in proximity (approx. 330m) of Local Landscape Policy Area MY05: Maghaberry (BMAP 2015). Site is not within LCCC Landscape Wedge.		2
TPOs	No TPOs on or adjoining site.		3

Topography	Site slopes slightly uphill to the northeast (contours suggest rising from between 50 and 60m above sea level to between 70 and 80 metres above sea level in the NE corner over a distance of about 630m).	3
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain but is within the present day surface water floodplain (estimated to be less than 10% of site).	3
Market strength	<p>There is evidence of market interest in the site. There have been recent planning enquiries in 2019 for development of the site. Recent approvals have included a business park development, including 20no. industrial units (LA05/2016/1239/F), a part change of use from general/light industrial to storage and distribution facility (S/2014/0605/F), an end of life vehicle (ELV) facility (S/2014/0827/F), and a 500kw Centralised Anaerobic Digestion (CAD) plant (S/2013/0145/F).</p> <p>Former use of site as quarry, although the site appears to have been subject to remediation.</p> <p>Site first zoned for employment in the (unadopted) BMAP 2015.</p>	3
Overall comments	<p>The site is well-located for the road network on the A26 but is not in proximity to residential areas and community facilities.</p> <p>The site has an established use for heavier industry, storage and distribution uses. Fane Valley and Greenfield Fertilisers are the main occupiers of the site. The site would be suitable for further large scale storage and distribution (B4) uses.</p>	29

Site Address: Land South-East of Millmount Road, Comber Road, Metropolitan Castlereagh			
Site Ref: MCH 05	Location: Near Dundonald	Nearest Settlement: Dundonald	Total area: 9.27ha Developed area: 0.71ha Remaining area: 8.56ha
Criteria	Comment		Score
Road Access	Site accessed off the A22 (Comber Road). Secondary access off Millmount Road.		3
Public Transport Access	Nearest bus stop approx. 120m from the site on Millmount Village Drive, with hourly services to Belfast. No railway station is within proximity to the site.		2
Pedestrian/Cycle access	Pedestrian footpath along the A22. No cycleway.		2
Proximity to residential areas and community facilities	Millmount Village, consisting of a number of residential units, is located approx. 200m west of the site, and the site is at the edge of Dundonald. Billy Neil playing pitches are located approx. 270m to the south east of the site. To the north east of the site, Boots is approx. 1km, and an Asda and the Dundonald Medical Centre are approx. 1.7km from the site.		3
Brown/Greenfield status	Site approximately 92.6% greenfield status.		1
Adjoining Uses	A22 to the west, with agricultural use for forestry.		2
Proximity to Infrastructure	Site is adjacent to residential uses, so utility infrastructure may be available. However, this has not been confirmed.		2
Landscape and environmental designations	Site's western boundary is in close proximity (approx. 10m) to an Area of High Scenic Value (BMAP 2015) - Ref. COU5/08: Castlereagh Escarpment – and to Area of Constraint on Mineral Development (draft BMAP 2015) – Ref. COU8/08. Site northern boundary is in proximity (approx. 120m) to Local Landscape Policy Area MCH38: Moat/Enler, Metropolitan Castlereagh (BMAP 2015). Site adjoins to the south and is in proximity (approx. 10m) in the west, Site adjoins a LCCC Landscape Wedge along its southern boundary.		1
TPOs	No TPOs on or adjoining site.		3

Topography	Site appears to be flat (there are no contour lines within it)	3
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain (although it is adjacent to the river floodplain) but a small area is within the present day surface water floodplain (estimated to be less than 10% of site).	3
Market strength	There is evidence of market interest in the site; however, this is for a mixed-use development rather than all employment uses. There is a live planning application (LA05/2017/1153/F) for a mixed-use development comprising housing (119 units), and 18 industrial units of (B1b/B1c and B2 uses). Site first zoned for employment in the (unadopted) BMAP 2015.	2
Overall comments	The site is well-located for the road network on the A22 and is in proximity to residential areas with some provision of community facilities. The site is 92.7% greenfield. There is a live planning application for development of the site but for a mixed-use scheme which would include suitable business space for B1/B2 uses. The site would be suitable for offices and research and development (B1) uses.	27

Site Address: Derriaghy Industrial Park, Lisburn Greater Urban Area			
Site Ref: ML 06	Location: Near Dunmurry	Nearest Settlement: Dunmurry	Total area: 44.54ha Developed area: 39.27ha Remaining area: 5.27ha
Criteria	Comment		Score
Road Access	Site can be accessed by the A512 (Creighton Road) and The Cutts, leading to the A1 (Kingsway Road).		3
Public Transport Access	Nearest bus stop approx. 400m east from site on the A1, with frequent (every 20 minutes) services to Belfast. Derriaghy railway station is approx. 400m from the site in addition to Dunmurry railway station located approx. 1.4km north of the site.		3
Pedestrian/Cycle access	Pedestrian footpath along the A1 aside and along The Cutts immediately within the site. A shared cycleway is located along the A1.		3
Proximity to residential areas and community facilities	Residential area to the south of The Cutts (including the new Eaton Court and Eaton Park developments), immediately to the south of the site, and also to the north west of the A512. The Rowan Medical Centre is approx. 500m north of the site. Fast food restaurant Hungry Harry's and the takeaway Ocean Chinese are both approx. 400m south of the site. The Speckled Hen gastro pub is 1.2km west of the site, and the Tesco superstore is approx. 1.8km north east from the site.		3
Brown/Greenfield status	Approximately 58% of the remaining area of the site is brownfield and 42% is greenfield land.		2
Adjoining Uses	Disused DeLorean test track to the north east of the site, separated by thick vegetation. Railway line to the east. The Cutts Road to the south. McKinstry Road (A513) and Creighton Road (A512) to the west.		3
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available.		3

Landscape and environmental designations	<p>Site's south eastern boundary in proximity (approx. 40m) to AoNB (Lagan Valley), Historic Park, Garden and Demesne (BMAP 2015) – Ref. LN17/02. Site eastern boundary in proximity (approx. 170m) to Historic Park, Garden and Demesne (BMAP 2015) – Ref. LN17/03. Site southern boundary in proximity (approx. 80m) to Lagan Valley Regional Park (BMAP 2015). Site adjoins Local Landscape Policy Area ML15: Derriaghy River, Metropolitan Lisburn (BMAP 2015) to the north. Site western corner is in proximity to Local Landscape Policy Area MN05: South of Derriaghy Road, Milltown (BMAP 2015) and approx. 100m from Local Landscape Policy Area MN06: North of Derriaghy Road, Milltown (BMAP 2015). Site approx. 480m north west of Local Landscape Policy Area LC24: McKinsty Road, Lisburn City.</p> <p>Site in proximity to Sites of Local Nature Conservation Importance (BMAP 2015) – Ref. MN04/03 (approx. 60m west of site), Ref. MN04/01 (approx. 220m west of site), Ref. ML11/04 (approx. 110m south of site) and Ref. ML11/07 (approx. 170m east of site). Site in proximity (approx. 80m to south and 170m to east) to Area of Constraint on Mineral Development (draft BMAP) – Ref. LN03/32, LN03/29 and COU8/10. Site in proximity to Areas of Constraint on Mineral Development Ref. LN03/06 (70m west) and Ref – LN03/04 (210m west).</p> <p>Site is in proximity (approx. 20m) to LCCC Landscape Wedge along its western boundary.</p>	1
TPOs	No TPOs on or adjoining site, although in proximity (approx. 40m).	3
Topography	Site is entirely previously developed land (hard to see contours from map). Suggests the site is generally level with no constraints upon development.	3
Flood Risk	Site is outside extent of Dec 1978 floodplain. The site is not within the present day sea or river floodplain (although a stream runs through the site) but is within the present day surface water floodplain (estimated to be up to 50% of site).	1
Market strength	<p>The site is largely developed, with only 5.3ha remaining out of a total of 44.5ha.</p> <p>Planning permission was granted for the erection of storage and distribution centre (LA05/2016/0191/F).</p> <p>There is also evidence of market interest in the site but for redevelopment into non-employment uses: a petrol station (LA05/2018/1032/F) and restaurant (LA05/2018/0146/F).</p> <p>Site first zoned in the adopted Lisburn Area Plan (2001).</p>	2
Overall comments	<p>The site is well-located for the road network for the road network on the A512 and A1. The site is in close proximity to residential areas, along with a number of community facilities.</p> <p>The remaining area of the site is approx. 58% brownfield and 42% greenfield land.</p>	30

	<p>The site was first zoned in the adopted Lisburn Area Plan (2001) which suggests a limited market demand to develop remaining land on site. The site includes a range of uses, including a large proportion of non-employment uses. This site could be suitable for a range of employment uses (B1 to B4).</p>	
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Site Address: Saintfield Road, Carryduff			
Site Ref: CF 09	Location: Near Carryduff	Nearest Settlement: Carryduff	Total area: 3.80ha Developed area: 3.33ha Remaining area: 0.47ha
Criteria	Comment		Score
Road Access	Site accessed off the A24 (Saintfield Road).		3
Public Transport Access	Nearest bus stop approx. 100m from site on Saintfield Road, with frequent services to Belfast (approx. every 20 minutes).		2
Pedestrian/Cycle access	Pedestrian footpath along the A24 from immediately outside the entrance. Cycle path along the opposite side of the A24.		3
Proximity to residential areas and community facilities	The northern section of Carryduff, consisting of a number of residential units, is located approx. 250m east of the site. McDonalds is approx. 90m from east of the site, a post office 150m east from the site and Joseph's Primary School lies approx. 200m east of the site. Belfast Health & Social Care Trust is located approx. 1.2km north west of the site, with a Tesco superstore a further 2.7km north from the site.		3
Brown/Greenfield status	All of the remaining land on site is of brownfield status.		3
Adjoining Uses	Fields to the north west, west and south west of the site. Builders yard and one residential dwelling to the south. The A24 to the east.		2
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	Site is completely within Lagan Valley AoNB (BMAP 2015). The site adjoins an Area of High Scenic Value (BMAP 2015) – Ref. COU5/07. The site is within Site of Local Nature Conservation Importance (BMAP 2015), Ref. MCH28/14 (estimated to be less than 5% of site). Site is in proximity (approx. 5m) to Site of Local Nature Conservation Importance (BMAP 2015) - Ref. CR02/05. Site is in proximity (approx. 420m) to Site of Local Nature Conservation Importance (BMAP 2015) – Ref. CR02/07.		1

	<p>Site adjoins Area of Constraint on Mineral Developments (draft BMAP 2015), Ref- COU8/07 and CR07/20. Site is in proximity to Area of Constraint on Mineral Developments (draft BMAP 2015), Ref- CR07/04 (approx. 30m from site boundary) and Ref CR07/27 (approx. 10m from site boundary).</p> <p>Site is in proximity (approx. 60m) of Local Landscape Policy Area CF14: Saintfield Road, Carryduff (BMAP).</p> <p>Site adjoins a LCCC Landscape Wedge to the west and north.</p>	
TPOs	No TPOs on or adjoining site.	3
Topography	Site slopes uphill to the east, roughly 20m elevation change in 160m distance.	2
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain (although a stream runs adjacent to the site) but is within the present day surface water floodplain (estimated to be less than 20% of site).	2
Market strength	<p>No evidence of market interest in the site for employment uses. However, there has been interest for other uses – a care home (LA05/2017/0021/F and LA05/2015/0726/F) and a gym (LA05/2018/0316/F) (approved).</p> <p>Site first zoned for employment in the (unadopted) BMAP 2015.</p>	1
Overall comments	<p>The site is well-located for the road network on the A24 (Saintfield Road) and is in proximity to residential areas with some provision of community facilities.</p> <p>The remaining area of the site is brownfield.</p> <p>However, the Council’s Employment Land Monitor states that the site is dated and suffers from poor road surface/infrastructure.</p> <p>This site is likely to be suitable for B1, B2 or B3 uses.</p>	28

Site Address: Caborhill Industrial Estate/Beechill Business Park, Beechill Road, Metropolitan Castlereagh			
Site Ref: MCH08	Location: Near Newtonbreda	Nearest Settlement: Castlereagh	Total area: 2.0ha Developed area: 1.62ha Remaining area: 0.38ha
Criteria	Comment		Score
Road Access	Site accessed off Beechill Road, approx. 0.4km from the A55. Beechill Road is in a residential area and has traffic calming measures.		1
Public Transport Access	Nearest bus stop approx. 100m north from the site on Beechill Road, with limited services to Belfast (approx. every hour). Carinshill Park and Ride is approx. 870m south east of the site.		2
Pedestrian/Cycle access	Pedestrian footpath along Beechill Road. No cycle path within proximity to the site.		2
Proximity to residential areas and community facilities	Residential areas of Newtownbreda to the east and south of the site. Tesco superstore is approx. 250m south of the site, Beechill Inn restaurant is approx. 480m south east of the site, and Forster Green Hospital is approx. 1.5km north of the site.		3
Brown/Greenfield status	All of the remaining land is of greenfield status.		1
Adjoining Uses	The site is defined by Beechill Road to the north east, residential to the north west and south east and a covered reservoir to the south. A large residential property is present within the southernmost portion of the site.		2
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	Site is in proximity (approx. 80m) to the Lagan Valley AoNB (BMAP 2015) and to the Lagan Valley Regional Park (BMAP 2015) Ref- COU12. The site is in proximity to Site of Local Nature Conservation Importance (BMAP 2015), Ref. MCH28/03 (approx. 120m from northern site boundary) and Ref. MCH28/02 (approx. 250m from southeast site boundary).		1

	Site is in proximity to Areas of Constraint on Mineral Developments (draft BMAP 2015), Ref- CR07/09 (CA02/44) and Ref- COU8/10 (approx. 120m from northern site boundary) and site Ref- CR07/08 (approx. 250m from southeast site boundary). Site is in proximity (approx. 280m) to Local Landscape Policy Area MCH39: Newtownbreda, Metropolitan Castlereagh (BMAP 2015).	
TPOs	No TPOs on or adjoining site.	3
Topography	Site slopes uphill to the south, roughly 20m elevation change in 420m distance.	2
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain (although a stream runs adjacent to the site) but is within the present day surface water floodplain (estimated to be less than 25% of site).	2
Market strength	There is limited evidence of market interest in the site for some employment use – a live application (LA05/2018/0264/F) for a proposed equipment store and offices. Site first zoned for employment in the (unadopted) BMAP 2015.	2
Overall comments	Access to the site is subject to constraints, with traffic calming measures in place on Beechill Road. The site is in proximity to residential and community facilities. All remaining land is of greenfield status. The site could be suitable for additional B1 or B2 uses that would not generate significant traffic.	24

Site Address: Lissue Industrial Estate, Moira Road, Lisburn City			
Site Ref: LC 14	Location: Near Lisburn City	Nearest Settlement: Lisburn City	Total area: 52.82ha Developed area: 49.09ha Remaining area: 3.73ha
Criteria	Comment		Score
Road Access	Separate access to each portion of the site (Lissue West and Lissue East) just off the A3 (Moira Road).		3
Public Transport Access	Nearest bus route is within approx. 200m of the site on the A3, with services approx. hourly to Belfast. Lisburn railway station is approx. 3.5km east of the site.		2
Pedestrian/Cycle access	Pedestrian footpath along the south of the site on the A3. No cycle path within proximity to the site.		2
Proximity to residential areas and community facilities	Residential areas in outskirts of Lisburn approx. 1.5km to the east of the site. Knockmore Primary School is located approx. 1.6km to the east of the site, Lidl is approx. 1.2km to the east of the site and Bar Bistro Down Royal Golf Course is 2.4km west of the site.		2
Brown/Greenfield status	All remaining land is of greenfield status.		1
Adjoining Uses	Railway line to the north, Knockmore Road to the east, Moira Road (A3) to the south and Cross Lane to the west. Eastern portion of site includes 6 detached houses.		2
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	Site is in proximity (approx. 500m from northeast site boundary) to Area of Constraint on Mineral Developments (draft BMAP 2015), Ref- LN03/11. Site adjoins Local Landscape Policy Area LC21: Knockmore, Lisburn City (BMAP 2015) to the south. Site surrounds and adjoins Local Landscape Policy Area LC26: Rathdown, Moira Road, Lisburn City (BMAP 2015).		1

TPOs	No TPOs on or adjoining site.	3
Topography	Entirety is of site has been previously developed (there are no contour lines in most of the site).	3
Flood Risk	Site is inside extent of Dec 1978 floodplain (estimated to be less than 5% of site). The site is not within the present day sea floodplain but is within the present day river floodplain (estimated to be approx. 25% of site) and within the present day surface water floodplain (estimated to be less than 10% of site).	2
Market strength	There is evidence of market interest in the site for employment use. A new 875sqm building has been constructed for employment use in Lissue West (Smiley Monroe) (LA05/2017/0480/F). New building at Lissue East for workshop and storage (LA05/2018/0227/F). Permission granted for 9no. B2 light industrial units (LA05/2017/0255/F). Site first zoned for employment in the adopted Lisburn Area Plan 2001.	3
Overall comments	The site is well-located for the road network on the A5 (Moir Road) and has reasonable access to residential areas and provision of community facilities. All remaining land is of greenfield status. The site was first zoned in 2001 and therefore there is limited demand in developing the remaining land on site. The site could be suitable for further B1 to B4 uses.	27

Site Address: Newtownbreda Factory Estate, Cedarhurst Road, Castlereagh			
Site Ref: MCH07	Location: Near Newtownbreda	Nearest Settlement: Castlereagh	Total area: 1.2ha Developed area: 1.2ha Remaining area: 0ha
Criteria	Comment		Score
Road Access	Site accessed off Cedarhurst Road, off Beechill Road, approx. 0.7km from the A55. Beechill Road is in a residential area and has traffic calming measures. There are reported car parking issues on Cedarhurst Road.		1
Public Transport Access	Nearest bus stop approx. 220m north from the site on Beechill Road, with limited services to Beechill (approx. every hour). Cairnshill Park and Ride is approx. 600m east of the site. No railway station in close proximity to the site.		2
Pedestrian/Cycle access	Pedestrian footpath along Cedarhurst Road. No cycle path within proximity to the site.		2
Proximity to residential areas and community facilities	The site is located in close proximity to residential uses in Newtownbreda. Beechill Inn restaurant is located approx. 180m east of the site. Tesco Superstore is approx. 350m west of the site. Breda Academy School is approx. 600m north of the site. Belvoir Surgery is approx. 840m south west of the site.		3
Brown/Greenfield status	All land is of brownfield status, as the site is completely developed.		3
Adjoining Uses	Residential uses to the north west. Fields to the north east. Indoor activity centre to the south (including indoor ski slope). The site is fairly constrained.		1
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	Site is in proximity (approx. 460m) to Lagan Valley Regional Park and is within the Lagan Valley AoNB (BMAP 2015), which is estimated to cover less than 5% of the site.		1

	<p>The site is in proximity (approx. 10m) to Site of Local Nature Conservation Importance (BMAP 2015), Ref. MCH28/02. Site is in proximity (approx. 460m) to Site of Local Nature Conservation Importance (BMAP 2015) - Ref. MCH28/03.</p> <p>Site is in proximity to Areas of Constraint on Mineral Developments (draft BMAP 2015), Ref. CR07/08 (approx. 10m from southeast site boundary) and Ref. CR07/09 (CA)2/44) and Ref. COU8/10 (approx. 460m from north site boundary).</p>	
TPOs	No TPOs on or adjoining site.	3
Topography	Site is small and appears flat (no contours).	3
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain but is within the present day surface water floodplain (estimated to be less than 25% of site).	2
Market strength	<p>The site is fully developed. One planning application in recent years: retrospective change of use from storage & distribution (B4) to industrial (B2).</p> <p>Site first zoned for employment in the (unadopted) BMAP 2015.</p>	3
Overall comments	<p>Despite its proximity to the A55, access to the site is subject to constraints, with traffic calming measures in place on Beechill Road and reported car parking problems on Cedarhurst Road. The site is constrained and adjoins residential uses to the west.</p> <p>The site is fully developed and includes 3 buildings in B2 use.</p> <p>The site may not be suitable for any changes of use that would generate significant traffic or noise. B1 or B2 uses may be suitable. Expansion of the site is unlikely to be appropriate.</p>	27

Site Address: Blaris Industrial Estate, Altona Road/Hillsborough Old Road, Lisburn City			
Site Ref: LC10	Location: Near Lisburn	Nearest Settlement: Lisburn	Total area: 25.23ha Developed area: 24.46ha Remaining area: 0.77ha
Criteria	Comment		Score
Road Access	Site accessed off Hillsborough Old Road, approx. 1km from the A1, which connects to the M1.		3
Public Transport Access	Nearest bus stop approx. 300m north of the site, with limited services to Sprucefield (approx. every 3 hours). Lisburn railway station approx. 1.4km north of the site.		2
Pedestrian/Cycle access	Pedestrian footpath to the west of the site along Hillsborough Old Road immediately outside the entrance. No cycle path in close proximity to the site.		2
Proximity to residential areas and community facilities	Edgewater residential area, considering of a number of units, is located approx. 300m to the north of the site. Lagan Valley Hospital is located approx. 500m north west of the site. A café is located approx. 350m north of the site. A Post Office is located approx. 550m west of the site. Sainsbury's Sprucefield is approx. 2.2km south from the site.		3
Brown/Greenfield status	All the remaining land on site is of greenfield status.		1
Adjoining Uses	Park land to the north of the site, adjacent to Hillsborough Old Road. Residential to the north east and south west of the site. The M1 is to the south east. The Hillsborough Old Road is to the north west of the site, with residential uses on the other side of the road. Agricultural uses to the east and south of the site along the M1.		2
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	Site is in proximity (approx. 460m) to Lagan Valley AONB (BMAP 2015). Site is in proximity (approx. 20m) Lagan Valley Regional Park.		1

	<p>Site is in proximity to Lagan Valley Regional Park Node LN13 (approx. 300m from northern site boundary) and LN14 (approx. 500m from western site boundary).</p> <p>The site is in proximity to Sites of Local Nature Conservation Importance (BMAP 2015), Ref. LC20/04 (approx. 20m from northern site boundary), Ref. LC20/05 (approx. 100m from northern site boundary), Ref. LC20/13 (approx. 280m from site western boundary) and Ref. LC20/12 (approx. 320m from western site boundary).</p> <p>Site is in proximity to Areas of Constraint on Mineral Developments (draft BMAP 2015) - Ref. COU8/10 and LN03/14 (approx. 20m from northern site boundary), Ref. LN03/15 (approx. 100m from northern site boundary), Ref. LN03/23 (approx. 280m from site western boundary), Ref. LN03/22 (approx. 320m from western site boundary).</p>	
TPOs	No TPOs on or adjoining site.	3
Topography	Site is largely developed. Site slopes uphill to the southeast, roughly 20m elevation change in 680m distance.	2
Flood Risk	Site is outside extent of Dec 1978 flood. The site is not within the present day sea or river floodplain but is within the present day surface water floodplain (estimated to be less than 10% of site).	3
Market strength	<p>The site includes a number of non-employment uses, including commerce, industry, storage, distribution, gymnasiums, a council depot, crèche and a church. There has been market interest in the site for other non-employment uses – planning permission granted for D1/D2 play and adventure centre LA05/2018/0228/F. No evidence of interest for employment uses.</p> <p>Site first zoned for employment use in the adopted Lisburn Area Plan (2001).</p>	1
Overall comments	<p>The site is well-located for the road network on Hillsborough Old Road and the M1. However, transport impacts on the Hillsborough Old Road would have to be considered carefully. The site is in proximity to residential areas and community facilities.</p> <p>The remaining area to be developed is 100% greenfield status. This site has been zoned since the adoption of the Lisburn Area Plan (2001) and therefore suggests there is limited demand to develop the remaining land on site. The site would be suitable for further office, industrial or storage and distribution (B1, B2 and B4) use.</p>	26

Site Address: Barbour Threads Mill, Mill Street, Lisburn City			
Site Ref: LC08	Location: Near Lisburn City	Nearest Settlement: Lisburn City	Total area: 5.53ha Developed area: 2.7ha Remaining area: 2.83ha
Criteria	Comment		Score
Road Access	Site can be accessed off Mill Street, a narrow lane passing under a railway bridge, approx. 0.5km from the A1.		1
Public Transport Access	Nearest bus stop approx. 170m north from the site on Bridge Street, with limited services to Drumbeg and Belfast (approx. every 1.5 hours). Hilden railway station is approx. 500m west of the site.		2
Pedestrian/Cycle access	Pedestrian footpath along Mill Street immediately outside of the site. No cycle path within proximity to the site.		1
Proximity to residential areas and community facilities	Hilden Court, consisting of a number of residential units, is located approx. 200m south west of the site. Glenmore Activity Centre is approx. 460m west of the site. Co-operative food is located approx. 1.2km north west of the site. Lagan Valley Hospital is approx. 2.4km south west of the site.		3
Brown/Greenfield status	All land is of brownfield status.		1
Adjoining Uses	Agricultural uses to the north, east and south of the site.		1
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	Site is completely within Lagan Valley AONB (BMAP 2015). The site adjoins the Lagan Valley Regional Park. The site is completely within Area of Townscape Character (BMAP 2015), Ref. LC31: Hilden, Lisburn City. Site adjoins Lagan Valley Region Park Node LN11 (BMAP 2015). The site adjoins Site of Local Nature Conservation Importance (BMAP 2015), Ref. LC20/07. Site is in proximity (approx. 20m) to Site of Local Nature Conservation Importance (BMAP 2015) - LN01/38.		1

	<p>Site adjoins Area of Constraint on Mineral Developments (draft BMAP 2015), Ref. COU8/10.</p> <p>Site is in proximity (approx. 410m from northeast site boundary) of Local Landscape Policy Area TS03: Tullynacross Road, Tullynacross (BMAP 2015). Site is in proximity (approx. 70m) to Local Landscape Policy Area TS02: River and Canal, Tullynacross.</p>	
TPOs	TPOs on site (estimated to cover less than 5% of site).	3
Topography	Site slopes uphill to the west.	2
Flood Risk	Small area of the site is inside extent of Dec 1978 flood (estimated to be less than 5% of site). The site is not within the present day sea floodplain but a small area of the site is within the present day river floodplain (estimated to be less than 5% of site) and the present day surface water floodplain (estimated to be less than 10% of site).	3
Market strength	<p>No recent market interest in the site for employment uses. A previous permission for a mixed-use urban village (S/2007/1482/F) has lapsed. This proposal included residential (605 units), B1 office space, B2 light industrial use, A3 restaurant use and community space.</p> <p>Vacant mill buildings (which include a number of listed features) take up most of the site.</p> <p>Site first zoned for employment in the (unadopted) BMAP 2015.</p>	1
Overall comments	<p>The site has constrained access to the main road network via Mill Street. However, it is in proximity to residential areas with some provision of community facilities.</p> <p>The site is of brownfield status.</p> <p>Constraints include the listed vacant mill buildings covering most of the site, which would add cost to any development proposal.</p> <p>Subject to addressing these constraints, the site could be suitable for further office (B1) and light industrial (B2) use.</p>	22

Site Address: Seymour Hill Industrial Estate, Lisburn Greater Urban Area			
Site Ref: ML 05	Location: Near Dunmurry	Nearest Settlement: Dunmurry	Total area: 10.8ha Developed area: 6.07ha Remaining area: 4.73ha
Criteria	Comment		Score
Road Access	Site access off Yew Tree Walk, which connects to the A1 (Kingsway Road), approx. 0.6km to the north west of the site.		1
Public Transport Access	Nearest bus route is approx. 700m north west of the site, with frequent bus services to Belfast (approx. every 10 minutes). Dunmurry railway station is approx. 1.0km to the north of the site.		2
Pedestrian/Cycle access	Narrow pavement along Yew Tree Walk – not wide enough to be considered a pedestrian footpath. No cycle path within proximity to the site.		1
Proximity to residential areas and community facilities	Larch Grove, consisting of a number of residential units, is located approx. 300m to the west of the site. Rowan Medical Practice is located approx. 630m to the west of the site. Seymour Hill Post office is approx. 600m to the west of the site. The Golden Bowl restaurant is approx. 660m to the south west. Dunmurry Primary School is located approx. 460m to the north of the site.		3
Brown/Greenfield status	All of the remaining land is of greenfield status.		1
Adjoining Uses	Residential areas to the north and west of the site but separated by thick vegetation. Agricultural use to the north west, east and south of the site. Approx. 100m to the east of the site is a water treatment plant.		2
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	Site is within Lagan Valley AONB (BMAP 2015), estimated to cover approx. 70% of site. Site is completely within the Lagan Valley Regional Park.		1

	<p>Site adjoins Historic Park, Garden and Demesne (BMAP 2015) Ref. LN17/03. Site is in proximity (approx. 420m) to Lagan Valley Regional Park Node LN09.</p> <p>The site is within Site of Local Nature Conservation Importance (BMAP 2015), Ref. ML11/07 (estimated to be approx. 60% of site). Site is in proximity (approx. 420m) to Site of Local Nature Conservation Importance (BMAP 2015) - Ref. CA01/07.</p> <p>Site is completely within Area of Constraint on Mineral Developments (draft BMAP 2015), Ref. COU8/10 and partially within Area of Constraint on Mineral Developments Ref. LN03/32. Site is in proximity to Area of Constraint on Mineral Developments (draft BMAP 2015), Ref. CA02/43 (approx. 420m from site eastern boundary).</p> <p>Site is in proximity (approx. 440m) to Local Landscape Policy Area ML15: Derriaghy River, Metropolitan Lisburn (BMAP 2015).</p>	
TPOs	No TPOs on or adjoining site.	3
Topography	The site is partly developed. Site slopes downhill in its centre where a stream flows north-south through the site.	2
Flood Risk	Small area of the site is inside extent of Dec 1978 flood (estimated to be less than 5% of site). The site is not within the present day sea floodplain but a small area is within the present day river floodplain (estimated to be less than 5% of site) and inside the surface water floodplain (estimated to be less than 10% of site).	3
Market strength	<p>Limited market interest for employment use. However, a planning application (S/2012/0520/O) was approved for the expansion of the existing industrial estate at Seymour Hill for 4 industrial units for production and storage of furniture goods (B2) use. Four vacant units in the south-west of the site. The Council's Employment Land Monitor report states that the eastern half of the site is only half developed due to status as an Area of Outstanding Natural Beauty.</p> <p>Site first zoned for employment in the unadopted BMAP 2015.</p>	1
Overall comments	<p>The site has limited access to the road network via Yew Tree Walk off the A1 (Kingsway Road). However, it is in proximity to a number of residential units and community facilities.</p> <p>All remaining land is of greenfield status.</p> <p>The site currently has light industrial (B2), general industrial (B3) and storage and distribution (B4) use on site. Constraints include the designations affecting the site, including its location within an AONB.</p> <p>Subject to addressing these constraints the site could be suitable for further B1 or B2/B3 use.</p>	23

Site Address: Maryland Industrial Estate, Crossnacreevy, Castlereagh Countryside			
Site Ref: CR01	Location: Near Crossnacreevy	Nearest Settlement: Crossnacreevy	Total area: 5.58ha Developed area: 5.47ha Remaining area: 0.11ha
Criteria	Comment		Score
Road Access	Site can be accessed off the A23 (Ballygowan Road) to the north and the A23 (Moneyreagh Road to the South), Knockbracken Road to the west of the site and Gransha Road to the east of the site.		3
Public Transport Access	Nearest bus stop approx. 200m south of the site with limited services to Ballygowan and Raffery (approx. every 2 hours). No railway station in close proximity to the site.		1
Pedestrian/Cycle access	Pedestrian footpath along the A23 immediately outside of the site. No cycle path within proximity to the site.		2
Proximity to residential areas and community facilities	Crossnacreevy, which includes a number of residential units, is located approx. 800m north of the site. Moneyrea Primary School is located approx. 800m south of the site. A coffee shop is located approx. 1.9km north of the site. Four Winds restaurant is located approx. 3.7km west of the site. Forster Green Hospital is located approx. 4.5km north west of the site.		1
Brown/Greenfield status	Remaining area still to be developed is greenfield.		1
Adjoining Uses	Agricultural uses to the north, east, south east and west of the site. One residential dwelling to the south of the site and another to the north west.		1
Proximity to Infrastructure	Existing employment uses on the site indicate that utility infrastructure is likely to be available, although this has not been confirmed.		3
Landscape and environmental designations	The site is in proximity (approx. 70m from northern site boundary) to Local Landscape Policy Area CSY04: East of Crossnacreevy, Crossnacreevy (BMAP 2015).		1
TPOs	No TPOs on or adjoining site.		3

<p>Topography</p>	<p>The majority of the site is previously developed. Site slopes uphill to the west, roughly 20m elevation change in 330m distance. However, the small remaining portion of the site is not likely to be constrained by topography.</p>	<p>3</p>
<p>Flood Risk</p>	<p>Site is outside extent of Dec 1978 floodplain. The site is not within the present day sea or river floodplain (although a stream runs adjacent to the site) but a small area is within the present day surface water floodplain (estimated to be less than 10% of site).</p>	<p>3</p>
<p>Market strength</p>	<p>There is evidence of market interest in the site for employment and industrial use. The vacant portion of the site is the subject of application LA05/2018/0081/F for the construction of two semi-detached light industrial units. There have also been planning applications to expand the zoning of the site to the north (Y/2014/0373/F). Planning permission was granted (LA05/2017/0070/F) for storage and distribution (B4) use. The Council's Employment Land Monitor report states that the site is full and is unable to cope with market demands. Site first zoned for employment in the (unadopted) BMAP 2015.</p>	<p>3</p>
<p>Overall comments</p>	<p>The site is well-located for the road network in the A23 but has limited access to residential areas and community facilities. All of the remaining land is of greenfield status. Current use on the site includes business (B1), light industrial (B2) and storage and distribution (B4). This site continues to be suitable for these uses. Its limited access to community facilities means that it may be more suitable for industrial and storage/distribution uses going forward.</p>	<p>25</p>

Appendix 5 Site Breakdown

Lisburn & Castlereagh: Employment Land Review

Site Ref.	Site Name	Class B1	Class B2	Class B3	Class B4	Total B class	Ancillary / outbuildings	Non-B use classes	Undevelopable areas (e.g. roads, parking, floodplain)	Vacant greenfield	Vacant brownfield	Total available	Total site area
MCHo6	Land at Upper Newtownards/Carrowreagh	2.47	0.74	0.00	0.00	3.21	0.97	0.13	7.51	15.78	7.30	23.08	34.90
MCHo7	Newtownbreda Factory Estate Cedarhurst Road	0.00	0.44	0.00	0.00	0.44	0.32	0.00	0.44	0.00	0.00	0.00	1.20
MCHo8	Cedarhill Industrial Estate, Beechill Road	0.51	0.00	0.00	0.00	0.51	0.00	0.04	1.09	0.38	0.00	0.38	2.02
CFo7	Cyril Johnstone & Co, Ballynahinch Road	0.34	0.28	0.00	0.00	0.62	0.84	0.32	0.41	0.00	0.00	0.00	2.19
CFo8	Carryduff Business Park, Comber Road	0.12	1.14	0.00	0.27	1.53	0.81	0.14	2.56	0.09	0.00	0.09	5.13
CFo9	Saintfield Road	0.12	1.19	0.00	0.00	1.31	1.34	0.04	0.64	0.00	0.47	0.47	3.80
CF10	Eastbank Road, Carryduff	0.05	0.00	0.00	0.00	0.05	0.04	0.17	0.60	0.98	0.12	1.10	1.96
CF11	Edgar Industrial Estate	0.59	0.41	0.00	0.05	1.05	1.66	1.74	1.52	0.62	0.14	0.76	6.73
CRo1	Maryland Industrial Estate, Crossnacreevy	0.71	0.7	0.00	0.34	1.75	1.05	0.04	2.63	0.11	0.00	0.11	5.58
LCo9	Ballinderry/Knockmore Road	1.59	4.83	0.00	0.7	7.12	6.32	0.26	12.86	17.74	0.00	17.74	44.30
LC10	Blaris Industrial Estate	1.02	4.33	0.00	0.82	6.17	7.48	0.59	10.22	0.77	0.00	0.77	25.23
LC11	Enterprise Crescent, Ballinderry Road	2.09	1.1	0.00	0.02	3.21	1.91	0.31	7.76	0.00	0.00	0.00	13.19
LC12	Ballinderry Road	0.03	1.21	0.00	0.00	1.24	3.42	0.00	2.77	0.00	0.00	0.00	7.43
LC13	Flush Park Industrial Estate, Knockmore Road/Moira Road	0.91	0.16	0.00	0.25	1.32	2.26	0.34	1.00	1.42	2.13	3.55	8.47
LC14	Lissue Industrial Estate	2.83	3.8	2.06	3.72	12.41	13.78	2.84	20.06	3.73	0.00	3.73	52.82
LC15	Coca-Cola Plant, Lissue Road	0.00	5.23	0.00	0.00	5.23	2.21	0.00	9.86	1.17	0.00	1.17	18.47
MLo6	Derriaghy Industrial Estate	2.93	6.39	3.46	1.37	14.15	2.45	1.30	21.37	2.20	3.07	5.27	44.54
LN07	Lands at Glenavy Road, Moira	0.00	1.19	0.00	0.43	1.62	7.32	0.00	3.32	6.29	5.51	11.80	24.06
MLo5	Seymour Hill Industrial Estate	0.00	1.2	0.01	0.48	1.69	2.15	0.00	2.23	4.73	0.00	4.73	10.80
CFo5	Ballynahinch Road	0.01	0.00	0.00	0.00	0.01	0.44	0.00	0.00	10.51	0.78	11.29	11.74
CFo6	Lands at Comber Road	0.01	0.00	0.00	0.00	0.01	0.24	0.00	0.04	5.26	0.00	5.26	5.55
GYo5	Land North West of Gobrana Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.27	0.00	6.27	6.27
MCHo5	Lands SE of Millmount/Comber Road	0.00	0.00	0.00	0.00	0.00	0.00	0.33	0.38	8.56	0.00	8.56	9.27
LCo6	Knockmore/Lissue Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.09	0.00	3.09	3.09
LCo7	Lissue Road	0.00	0.00	0.00	0.00	0.00	0.00	2.06	1.42	10.86	0.00	10.86	14.34

Site Ref.	Site Name	Class B1	Class B2	Class B3	Class B4	Total B class	Ancillary / outbuildings	Non-B use classes	Undevelopable areas (e.g. roads, parking, floodplain)	Vacant greenfield	Vacant brownfield	Total available	Total site area
MCH 13	Knockbracken Healthcare Park, Saintfield Road	0.00	0.00	0.00	0.00	0.00	0.38	5.72	35.43	43.30	0.71	44.01	85.54
LC05	Blaris Road	0.00	0.00	0.00	0.00	0.00	0.00	7.33	7.16	104.98	0.00	104.98	119.47
LC08	Barbour Threads Mixed Use	0.13	0.09	0.00	0.00	0.22	0.00	0.00	2.48	0.00	2.83	2.83	5.53
DA05	Land South of Woodvale Development, Rathfriland Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	3.28	0.00	3.28	3.54
MCH 12	Forster Green, Saintfield Road	0.00	0.00	0.00	0.00	0.00	0.00	0.54	1.80	0.18	0.02	0.20	2.54
Total		16.5	34.4	5.5	8.5	64.9	57.4	24.2	157.8	252.3	23.1	275.4	579.7

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