



GL Hearn

Part of Capita plc

Liverpool City Region Areas of Search Assessment

Liverpool City Region

August 2019

Prepared by

GL Hearn
65 Gresham Street, London,
EC2V 7NQ

Contents

Section	Page
1 INTRODUCTION	5
2 UPDATE TO STAGE 1	7
3 AREAS OF SEARCH ASSESSMENT	14
4 CONCLUSION	30

LIST OF FIGURES

FIGURE 1: TAKE-UP OF EMPLOYMENT UNITS 100,000+ SQ FT, (2009-17)	13
FIGURE 2: AREAS OF SEARCH IN LIVERPOOL CITY REGION	16
FIGURE 3: AREA OF SEARCH EAST OF WHITEHOUSE INDUSTRIAL ESTATE	19
FIGURE 4: AREA OF SEARCH SOUTH OF HALSNEAD GARDEN VILLAGE	21
FIGURE 5: AREA OF SEARCH NORTH OF A580 AT KNOWSLEY IND. AND BUS. PARK	23
FIGURE 6: AREA OF SEARCH AT OMEGA SOUTH WESTERN EXTENSION, LAND NORTH OF FINCHES PLANTATION, BOLD	24
FIGURE 7: AREA OF SEARCH AT LAND TO THE WEST OF HAYDOCK IND. ESTATE AND LAND WEST OF MILLFIELD LANE	26
FIGURE 8: AREA OF SEARCH AT JUNCTION 3 M58	28
FIGURE 9: AREA OF SEARCH SOUTH WEST OF PIMBO EMPLOYMENT AREA	29

LIST OF TABLES

TABLE 1: FORECAST LARGE SCALE B8 REQUIREMENT 2012 TO 2037	5
TABLE 2: FORECAST LARGE SCALE B8 REQUIREMENT 2012 TO 2037	7
TABLE 3: UPDATE: SITE ASSESSMENT FINDINGS AND NET AREAS (HA)	8
TABLE 4: SUMMARY TABLE BY LOCAL AUTHORITY	10
TABLE 5: SUMMARY TABLE – COMMITTED SUPPLY (SITES WITH ALLOCATIONS AND PERMISSIONS)	10

TABLE 6:	STRATEGIC B8 SUPPLY / DEMAND BALANCE (HA)	11
TABLE 7:	POTENTIAL STRATEGIC B8 AREAS OF SEARCH IN LIVERPOOL REGION	15
TABLE 8:	POTENTIAL B8 STRATEGIC EMPLOYMENT AREAS	31

Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator.

This document must only be treated as a draft unless it is has been signed by the Originators and approved by a Business or Associate Director.

DATE

August 2019

ORIGINATORS

Hannah McDonald
Senior Planner

APPROVED

Matt Kinghan
Planning Director





Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

1 INTRODUCTION

Introduction

- 1.1 GL Hearn has been commissioned by the Liverpool City Region Combined Authority, on behalf of the 6 constituent authorities of Halton, Knowsley, Liverpool, Sefton, St.Helens and Wirral Councils and Associate Member of the Combined Authority West Lancashire Council, to undertake a series of site assessments in respect of potential future strategic distribution and warehousing requirements.
- 1.2 GL Hearn, working with Justin Gardner Consulting, Oxford Economics, and MDS Transmodal, produced the Liverpool City Region Strategic Housing and Economic Land Market Assessment (SHELMA), with the final version published in 2018. The SHELMA provided an objectively assessed need for housing, industrial and warehouse/distribution needs across the City Region and for each local authority. This study informed the content of Local Plans for local authorities in the Liverpool City Region.
- 1.3 The Liverpool City Region SHELMA identified the following overall need for large scale warehousing:

Table 1: Forecast Large Scale B8 Requirement 2012 to 2037

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

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

- 1.4 Following this study, GL Hearn, with inputs from B8 Real Estate, undertook the Liverpool City Region Assessment of the Supply of Large Scale B8 sites in June 2018 (Stage 1). The purpose of the study was to update and build on the findings of the 2016 large scale sites assessment in order to identify how much of the existing supply is realistically marketable and likely to come forward for large-scale B8 uses by 2037.
- 1.5 The Stage 1 study found that across the City Region, there is 493.4ha hectares of land with development potential of which 118.7 ha is likely to come forward for strategic B8, 221.1ha likely to come forward for strategic B2 or B8 and 153.6 ha likely to come forward for other uses or smaller development (see Table 3 below). This assessment notably falls short of the minimum forecast requirements identified in the SHELMA as above.

- 1.6 The purpose of this further study (Stage 2, March 2019) is to update and build on the work previously undertaken by assessing a further number of areas which are considered to provide further development potential for strategic B8 warehousing and distribution requirements.
- 1.7 The findings of the report are that of the sites assessed positively, in physical and market terms, after adjusting for potential B2 demand, there is approximately **281.0 ha** of land suitable for strategic B8 which vary in timing of delivery. This land area is in excess of that required to achieve the 'Do Something' strategic B8 requirement and thus fulfilling future growth requirements, however these sites will still require further assessment and allocation for development through the Local Plan process.
- 1.8 The structure of this report is as follows:
- Section 2: Update to Stage 1 (supply position)
 - Section 3: Areas of Search Assessment
 - Section 4: Conclusions

2 UPDATE TO STAGE 1

2.1 This section provides an update to the supply position reported in the Liverpool City Region Assessment of the Supply of Large Scale B8 sites report submitted in June 2018.

Update to supply position

2.2 The Liverpool City Region Strategic Housing and Economic Land Market Assessment (SHELMA) published 2018 identified the following overall need for large scale warehousing:

Table 2: Forecast Large Scale B8 Requirement 2012 to 2037

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

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

2.3 The Stage 1 report found 493.4 ha of land with development potential of which 118.7 ha is likely to come forward for strategic B8 and 221.7 ha likely to come forward for strategic B2 or B8. The Stage 1 report provides a breakdown by local authority area and in terms of sites with allocations and/or permissions forming part of the committed supply.

2.4 Initial consultation with Local Authorities that make up the study area informed the changes to the current supply position. All the sites considered were identified in the previous supply assessment therefore no additional land has been brought forward overall. However there has been a change to the planning status of one site in addition to a change in the future anticipated land use of another, as below:

- Atlantic Park in Sefton – permission granted for 2.2 ha of strategic B8; and
- In Knowsley, 7.2 ha of land ‘East of Knowsley Industrial and Business Park’ is expected to come forward as B8 (based on work undertaken in preparation of a development brief). This was previously considered to be suitable for B2/B8.

2.5 In addition, adjustments have been made to the reporting for Parkside East and West St Helens following discussion with St Helens Borough Council.

2.6 The table on the overleaf presents the updated supply position.

Table 3: Update: Site Assessment Findings and net Areas (Ha)

Local Authority	Site Name	Net Available land with development potential (ha)	Likely to come forward for strategic B8 (ha)	Likely to come forward for either strategic B2 or B8 (ha)	Other uses / smaller development / longer term prospect	Planning Status	Green Belt	Vacant plot in existing employment area
Halton	3MG, Widnes	45.6	30.0	15.6	-	planning permission		
Halton	Widnes Waterfront	26.6	-	17.9	8.7	allocated in adopted plan		
Halton	Port of Runcorn and Port of Weston	0	-	-	-	allocated in adopted plan		
Halton	Astmoor Business Park, Central Redevelopment Area	7.9	-	-	7.9	no planning status		
Halton	Land at Ditton Road	20.0	-	20.0	-	allocated in emerging plan		
Halton	Everite Road West	0	-	-	-	allocated in emerging plan		
Knowsley	Land to the South of the M62	22.5	-	22.5	-	allocated in adopted plan		
Knowsley	Knowsley Industrial Park	41.7	12.7	-	29.5	allocated in adopted plan		✓
Knowsley	Land east of Roscoes Wood, Tarbock Road, Huyton	4.3	-	-	4.3	planning permission		
Liverpool	Land to the West of Junction of Long Lane / Stopgate Lane	5.0	-	-	5.0	allocated in emerging plan		✓
Liverpool	A580 Stonebridge Cross	22.4	-	22.4	-	planning permission		
Liverpool	Estuary/ Liverpool International Business Park, Speke	5.1	-	-	5.1	allocated in emerging plan		✓
Sefton	Land east of Maghull	20.0	10.0	-	10.0	allocated in adopted plan		
Sefton	Atlantic Park, Dunnings Bridge Road Corridor	11.9	2.2	9.7	-	allocated in adopted plan / planning permission		✓

Liverpool City Region Areas of Search Assessment, August 2019

St Helens	Parkside West	79.6	-	79.6	-	allocated in emerging plan and live planning application	✓	
St Helens	Parkside East	64.55	52.0	12.55	-	allocated in emerging plan	✓	
St Helens	Land north of Penny Lane, Haydock	11.05	11.05	-	-	planning permission	✓	
St Helens	Florida Farm North, Haydock	36.67	-	36.67	-	planning permission	✓	
St Helens	Land to West of Haydock Industrial Estate, west of Millfield Lane	7.75	3.88	-	3.87	refused	✓	
West Lancs	XL Business Park	17.0	17.0	-	-	allocated in adopted plan / live planning application		✓
Wirral	Wirral International Business Park	25.8	-	8.1	17.65	allocated in emerging plan		✓
Wirral	Former Stone Manganese Site, Seacombe	6.9	-	-	6.9	no planning status		✓
Wirral	Eastham Dock Estate (Port Wirral)	15.9	-	-	15.9	allocated in emerging plan		
Wirral	Wallasey Bridge Road, Birkenhead	25.1	-	-	25.1	no planning status		
Wirral	Bidston Dock, Birkenhead	17.5	-	-	17.5	no planning status		
Total		540.82	138.83	245.02	157.47			

Table 4: Summary table by Local Authority

Local Authority	Sum of strategic B8 (ha)	Sum of strategic B2 or B8 (ha)	Total
Halton	30.0	53.5	83.5
Knowsley	12.7	22.5	35.2
Liverpool	0.0	22.4	22.4
Sefton	12.2	9.7	21.9
St Helens	66.93	128.82	195.75
West Lancs	17.0	0.0	17.0
Wirral	0.0	8.1	8.1
Sub-total	138.83	245.02	383.85
Strategic B8 Total	138.83 (118.7)	205.3* (176.9)	344.13 (295.6)

*80% of the Sub-total, (previous total Stage 1). As per Stage 1, a use class split of 80% has been applied to B8 and 20% to B2 development.

2.7 The table below shows the sites which are identified within the assessment as likely to support strategic B8 development including only sites which either benefit from planning permission for employment use or are allocated for employment uses in up to date adopted Local Plans. This shows that the current committed supply across the City Region provides a total of 184.2 ha across the City Region which can be considered likely to support strategic B8 development.

Table 5: Summary table – Committed Supply (Sites with Allocations and Permissions)

Local Authority	Sum of strategic B8 (ha)	Sum of strategic B2 or B8 (ha)	Total
Halton	30.0	33.5	63.5
Knowsley	12.7	22.5	35.2
Liverpool	-	22.4	22.4
Sefton	12.2	9.7	21.9
St Helens	12.5	36.67	49.17
West Lancs	17.0	-	17.0
Wirral	-	-	-
Sub-total	84.4	124.77	209.17
Strategic B8 Total	84.4 (70.8)	99.8 (100.5)	184.2 (171.3)

*80% of the Sub-total, (previous total Stage 1).

Supply / Demand Balance

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

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

- 2.9 We include a buffer of 10%¹ against the demand scenarios. This equates to roughly a year’s worth of annual take-up across the City Region. This results in the following need figures including a buffer:
 - The ‘Do Minimum’ scenario + buffer: 339 ha
 - The ‘Do-something/ Transport for the North Strategy’ scenario + buffer: 437 ha
- 2.10 The assessment of the current supply of sites set out in this report identifies a committed supply of 184.2 ha which is likely to come forward to meet the large-scale B8 demand.
- 2.11 The assessment also shows that if the supply of land likely to support strategic B8 development is extended to include sites as set out in Table 3, then the supply increases to 344.13 (previously 295.6) ha including Green Belt sites.
- 2.12 Overall the residual over supply is now 5.33 ha for the do minimum scenario and a residual requirement of 89.97 ha for the do something scenario.

Table 6: Strategic B8 Supply / Demand Balance (ha)

	‘Do Minimum’ Scenario	‘Do Something’ Scenario
Land demand: scenario + buffer	339	437
Committed supply		184.2
Supply from emerging / potential sites		159.93
Total supply		344.13
Residual requirement	+5.33	– 89.97

Market Overview

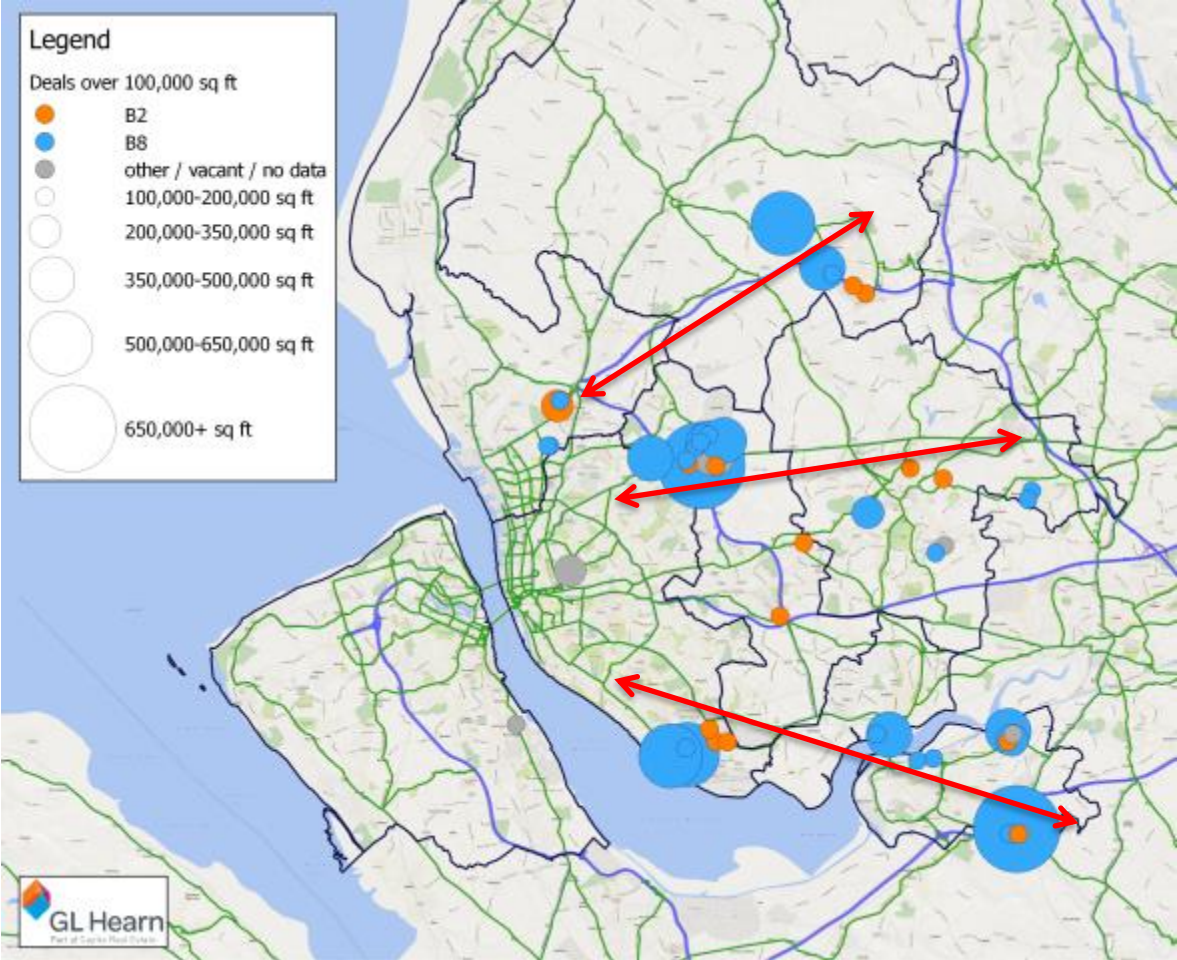
- 2.13 There is a clear concentration along the M6 corridor of distribution and logistics industrial uses. The corridor is a spine for the strategic supply chain connecting to industrial markets in the north and south of the region and nationally. This extends to the various connecting trunk roads including the M58, M62 and M56.
- 2.14 There are a number of key drivers in the location including the Port of Liverpool, Liverpool Airport and strategic roads connecting the region to London in the south, centres in the east (particularly Manchester) and centres in the north. The Port of Liverpool has recently expanded, increasing the carrying capacity of import and export trade. Liverpool Airport recently published a revised masterplan for long term expansion up to 2050 and the potential for freight rail and B8 employment land is being considered as part of the investigation. Investment in this infrastructure is critical in supporting the growth of the industrial economy. It is also a catalyst to increase the supply of B8 floorspace. However, in respect of the Liverpool Airport Masterplan the type of employment uses likely to locate in the area

¹ As per the Stage 1 report, the 10% buffer has been applied. When identifying the quantum of employment land to plan for it is necessary to include a buffer to account for churn, flexibility, normal market vacancy and choice. The 10% buffer accounts for the factors to ensure flexibility in the supply.

are still being developed and will depend on the progress of the Liverpool Local Plan at its EiP as there are Green Belt and designated habitat issues to be considered through the examination.

- 2.15 The map in Figure 1 below shows the spatial dimension of take-up of large scale floorspace across the City Region. The figure shows circles of different sizes according to the quantum of floorspace taken at each location.
- 2.16 The figure highlights the areas which have seen higher levels of activity for large scale units. This highlights the importance of the strategic road and motorway network with the majority of activity focused round key network nodes – particularly for the larger deals. The main exception to this is Liverpool International Business Park which benefits from its location close to the Liverpool conurbation and Liverpool Airport.
- 2.17 It is notable that the analysis shows a clear area of activity focussed across the centre of the City Region, focussed along the motorway and main A-road corridors linking Liverpool and the M6. This broadly covers the local authorities of Liverpool, Knowsley, Halton, and St Helens, as well as the southern parts of Sefton and West Lancashire.
- 2.18 Conversely, it is notable that there is virtually zero activity for larger units in the northern parts of Sefton and West Lancashire along with Wirral. The northern parts of Sefton and West Lancashire are relatively rural areas largely bypassed by the M6 corridor to the east, and with relatively poor A-Road coverage. Wirral is not optimally located for distribution uses due to its relatively poor connectivity to the rest of the City Region or to the M6. It benefits from good motorway provision, however connectivity to Liverpool and the rest of the City Region is restricted by tunnel access and there are more direct routes to the M6 and the rest of the north of England and the midlands.

Figure 1: Take-up of employment units 100,000+ sq ft, Spatial Distribution (2009-17)



Source: GL Hearn analysis of CoStar data

3 AREAS OF SEARCH ASSESSMENT

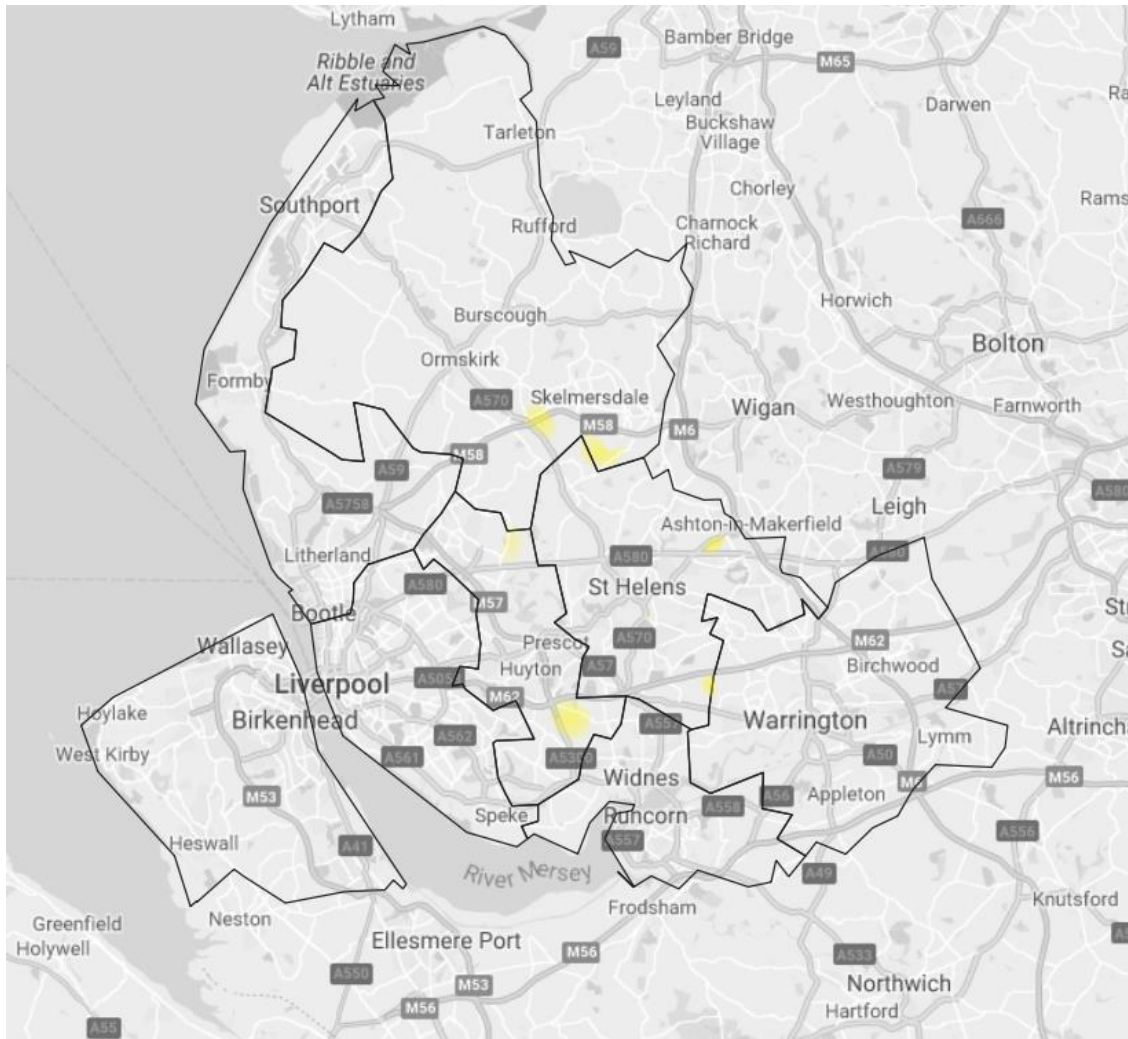
Introduction

- 3.1 This section of the report assesses the capacity of potential areas of search in the Liverpool City Region to accommodate future strategic B8 employment land.
- 3.2 Consultation with boroughs that make up the study area was undertaken to inform the identification of potential B8 areas of search. Key considerations in discussions related to size of area (at least 5 hectares), environmental constraints, Green Belt designations and infrastructure capacity including road network infrastructure. Only new unallocated areas have been considered as part of this study, not designated sites. However, a number of the areas considered are safeguarded sites as referenced in Local Plans. The table and figure below presents the agreed areas of search which have the capacity to potentially accommodate future B8 employment land.
- 3.3 Areas of search discounted at the initial assessment stage, include:
- Site at Halebank Road, Halton – discounted due to impact on the strategic gap in the Green Belt;
 - Land at Junction of A5300 / A562 – discounted as the site is predominantly Flood Zone 3; and
 - Switch Island, Sefton - discounted due to impact on this strategic gap in the Green Belt.
- 3.4 No areas of search were identified in Wirral due to its location relative to logistics demand.

Table 7: Potential strategic B8 areas of search in Liverpool Region

Local Authority	Area of Search
Halton	Area of search east of Whitehouse Industrial Estate
Knowsley	Area of search at Halshead Garden Village
Knowsley	Area of search north of A580 at Knowsley Industrial and Business Park
Liverpool	No new areas of search considered suitable for assessment
Sefton	No new areas of search considered suitable for assessment
St Helens	Area of search at Omega South Western Extension, land north of Finches Plantation, Bold
St Helens	Area of search at land to the west of Haydock Industrial Estate and land west of Millfield Lane
West Lancs	Area of search at Junction 3 M58
West Lancs	Area of search at South West of Pimbo Employment Area
Wirral	No new areas of search considered suitable for assessment

Figure 2: Areas of search in Liverpool City Region



Halton Areas of Search

3.5 There are a number of safeguarded sites in Halton as referenced in the draft Halton Delivery and Allocations Local Plan (2018). These include sites for potential future employment land which are currently designated as Green Belt. The draft Halton Delivery and Allocations Local Plan (2018) highlights that special circumstances for development on safeguarded land may be given in light of a shortfall of available employment land within the 5-year land supply. A number of these sites are contiguous being SG1, SG3, SG5, SG7 and SG8. These are assessed as one area of search in this study.

Area of search east of Whitehouse Industrial Estate

3.6 The area of search is up to 71.3 hectares in size and located to the east of the Whitehouse Industrial Estate and south of the M56 in Dutton. Under the draft Halton Delivery and Allocations Local Plan (2018), the area of search is referenced SG1, SG3, SG5, SG7 and SG8 and safeguarded to meet the future longer-term development needs beyond the period of the Local Plan.

3.7 The area of search is bounded by the Whitehouse Industrial Estate to the west and Green Belt to the east. The Whitehouse Industrial Estate is an established estate with existing infrastructure in place and access points to the strategic road network via the M56 and the A533 road corridors.

3.8 The canal to the west separates the site from the Whitehouse Industrial Estate. The canal is not necessarily a barrier to development; however it forms a natural segregation between the established industrial precinct and the safeguarded sites on the eastern side of the canal. The topography of the area is mostly flat and the shape is irregular. The land use of the area of search is currently farmland and there are a number of associated agricultural structures distributed around the area of search, including on Summer Lane in the north, New Manor Road in the centre and Barkers Hollow Road in the south. There is a cluster of residential properties to the south with housing facing the A533 and to the north along Windmill Lane. As the area is currently farmland, development would require the delivery of servicing infrastructure including road access and utilities.

3.9 A very small portion (approximately 3%) of the site is impacted by flood zone 3 along the Preston Brook. It is unlikely that this level will impact future employment land development.

3.10 The area of search is directly accessible to the M56 to the north via the A56 which currently connects Junction 11 to the established Whitehouse Industrial Estate. The A56 also connects to local roads servicing the area of search including Windmill Lane and Summer Lane. These local roads are narrow and currently provide access for a small number of residents and small-scale agricultural farming. To

the south, there is direct access to the A533 which shares accessibility with residential uses. If the area of search was to be developed for employment uses, a preferred route would be access to Junction 11 to the north through the delivery of a new access road. It is recognised that there are capacity issues at Junction 11, however Homes England are progressing discussions to resolve this in light of significant development forward in Warrington. In addition, the existing local roads will need to be graded to support the movement of heavy vehicles.

- 3.11 The area of search is strategically positioned at the southern point of the region with links to the M6 logistics spine via the M56 corridor. The site has direct access to the M56/A56 Junction which connects the site to markets in the north and Liverpool (including the port) via the A533 and to markets in the east via the M56.
- 3.12 The labour catchment is reasonable and includes the population in the surrounding areas of Frodsham, Windmill Hill, Runcorn and north of the Mersey to Widnes and Warrington. There is currently no public transport connecting the area of search.
- 3.13 Proximity to markets in the north (including Liverpool and the Port of Liverpool) and markets in the east via the A533 and the M56 make this area of search an appropriate location for future B8 employment. The area is sizable and unlikely to entirely absorb employment land development in the short term. Yet, there are phasing opportunities with the area to the north most suitable to be explored in the short term for employment land development.
- 3.14 **Conclusion: The area benefits from strong assets such as location and size, making it attractive for both the local and strategic industrial markets. It is well connected to local, regional and national markets via the A533 and the M56. Based on this, the area of search is well positioned to accommodate the growth of logistics and distribution uses and other uses (such as manufacturing and construction materials) in the south of the Liverpool region. Any development would require the delivery of local roads and supporting infrastructure. The size of the area of search provides opportunities for employment land to be delivered through phasing over the short, medium and long term.**

Figure 3: Area of search east of Whitehouse Industrial Estate



Knowsley Areas of Search

Area of search South of Halsnead Garden Village

- 3.15 The area of search is between A5300 and A5080 is currently Greenbelt under the Knowsley Council Local Plan (2016). The area of search is up to 108 Ha in size and strategically located south of the M57/M62 Junction in the southern boundary of the Local Authority. The area of search draws on existing local road network to establish an indicative boundary that broadly responds to the proposed Halsnead Garden Village employment area to the north.
- 3.16 The topography of the area of search is relatively flat. Currently, the area is primarily used for agricultural related activity. There is dense vegetation on the northern periphery of the area of search. There are a small number of residential, agricultural and industrial structures scattered across the area of search. There is also a quarry of approximately 10ha in the central north area which is assumed as undevelopable for industrial activity. A further approx. 10% of the area is indicated as Flood Zone 3 by the Environment Agency.
- 3.17 There is an established industrial estate, Huyton Quarry / Business Park, north west of the junction. The uses in this industrial estate are large format strategic uses primarily serving the local industrial

market, containing industrial businesses such as waste recycling, building supplies and vehicle mechanics. The land uses to the immediate east and west are Greenbelt.

- 3.18 Neighbouring land to the north east has been identified as a Development Opportunity Site in the Knowsley Council Local Plan (2016). This land forms part of the Halsnead Garden Village Masterplan which identifies plans for 1,600 dwellings, a country park and 22.5 Ha of employment land. The area of search provides an opportunity for wider expansion of the planned employment land to the north.
- 3.19 The area of search faces the M57/M62 Junction and is accessible via A5080 Cronton Road. Development for B8 use would require the development of a sequence of internal roads and plot configurations as well as utilities.
- 3.20 The area of search is well connected to surrounding local populations in Tarbock, Belle Vale, Whiston, Huyton and Prescot, capturing the strength of the labour force catchment. Public transport accessibility for employment however is limited. The closest train station is at Whiston which is a significant distance to the site meaning employees would be car dependent.
- 3.21 The area of search is a prime location for B8 land to serve the needs of the local industrial market. It benefits from access to the M57/M62 junction, connecting to surrounding local populations. The land to the north of the junction serves the local industrial market which will likely be the market this area of search will attract.
- 3.22 **Conclusion: The area of search is strategically positioned at the M57/M62 Junction and has a strong labour catchment. There is potential for it to draw on links to the established industrial precinct north of the junction and continue the role of serving both local and regional industrial markets.**

Figure 4: Area of search South of Halsnead Garden Village



Area of search north of A580 at Knowsley Industrial and Business Park

- 3.23 The area of search is up to 32.2 Ha in size and located north of the A580, directly to the east of Knowsley Industrial and Business Park. It is currently identified as Greenbelt land under the Knowsley Council Local Plan (2016).
- 3.24 The site is relatively flat. There is a small cluster of residential uses and small scale industrial sheds within the south western boundary of the site. These uses are accessible from Perimeter Road. This portion of the area of search may require the demolition or reconfiguration of existing uses in order to deliver road access for B8 uses.
- 3.25 The area of search is surrounded by foliage and trees to the north and a local road network to the east. An area of search to the north of the electricity substation reduces the visual impact of development as seen from the A580.
- 3.26 There is a large electricity station / power plant located on Molly's Lane, to the south of the area of search. There are powerlines positioned in the centre of the area of search, travelling north south. This is unlikely to significantly impact development. There are powerlines in the neighbouring

Knowsley Industrial and Business Park which have not been a barrier to development in terms of buffer zones between the power lines and industrial structures.

- 3.27 The area of search is to the east of the established Knowsley Industrial and Business Park which highly accessible and visible on the A580 road corridor. Knowsley Industrial and Business Park has a well-established local road network that supports the movement of freight and heavy vehicles. Any form of B8 development will require investment in an internal road network that connects to A5208 / Coopers Lane and then to the A580. There are therefore opportunities to extend the network to service the site. The A580 provides connections to the M57, west of Knowsley Industrial and Business Park. The M6 is considered a strategic spine connecting markets in the north and south of the nation which essentially makes B8 land along the M57 corridor a sought after location for freight and distribution industries.
- 3.28 The area of search is well connected to Liverpool with access to the Port of Liverpool to the west and health facilities in outer Liverpool such as Aintree University Hospital. This level of proximity is a benefit to the area of search.
- 3.29 The area of search has access to a strong labour catchment including the populations of Kirkby and Liverpool. Public transport access for employment is currently poor. The labour force would be reliant on private vehicle access.
- 3.30 Development for B8 use on this site would likely attract businesses that distribute nationally and seek close proximity to a motorway with strong north south connections. Development would be a natural extension east from the established Knowsley Industrial and Business Park.
- 3.31 **Conclusion: This is a highly accessible area with the potential to accommodate large format distribution uses that require strong north south connections to markets. It benefits from access to a strong labour catchment and proximity to the Port of Liverpool. The area of search is expected to experience demand for development in the short term.**

Figure 5: Area of search north of A580 at Knowsley Industrial and Business Park



St Helens Areas of Search

Area of search at Omega South Western Extension, land north of Finches Plantation, Bold

- 3.32 The area of search is up to 31.2 Ha and located on land north of Finches Plantation and south of the M62. The area of search is designated as Green Belt in the St Helens Unitary Development Plan (1998). It was identified in the updated 2018 St Helens Green Belt Review as suitable for removal from the Green Belt and proposed allocation (referenced EA1) in the Local Plan Preferred Options (2016) document. More recently, the 2018 St Helens Borough Local Plan Submission Draft has allocated the site for employment (as site 1EA). As the area of search is adjacent to the existing Omega employment site in Warrington and access is through Omega, St Helens and Warrington Councils have agreed that the area should be counted as meeting Warrington's employment needs. If the area of search is included in the forthcoming approved version of the St Helens Borough Local Plan as meeting the employment needs of Warrington, it may not be eligible for inclusion in the Liverpool City Region provision.
- 3.33 The use is currently farmland and there are no structures, road infrastructure or supporting utilities on the area of search. The surrounding uses include employment to the neighbouring east and agriculture to the west. The employment uses in the established industrial estate to the east include a range of strategic large scale B8 industries such as mail distribution and plastic manufacturing.

- 3.34 The area of search is centrally located in the region. This is a strategic asset for the area of search as road accessibility is strong. The location provides links to the M62/M6 Junction to the east of the area of search and the M62/M57 Junction to the west. Development for B8 use on the site would require access points from Omega South on the eastern boundary of the area of search (within the Warrington Local Authority). The St Helens Borough Local Plan Submission Draft (LPSD) notes the need for access via Omega as a means of mitigating impact on the M62 and Junction 8.
- 3.35 The labour catchment is reasonable with local populations in Warrington, St Helens and Widnes however the area of search currently has a lack of public transport accessibility. The nearest bus route is 2km from the area search and the rail station is 3km away. Future employees would be reliant on private car access.
- 3.36 The area of search is sizable and likely to accommodate large format strategic employment uses that require motorway access to regional and national markets. Development of the area of search would form a natural extension west of the established industrial estate. Any development on the area of search would require the construction of an access road and supporting utilities infrastructure.
- 3.37 **Conclusion: The area of search benefits from a central location in the region. It is likely to experience market demand for large scale strategic industrial uses in the short term to form a natural extension to the neighbouring established industrial estate.**

Figure 6: Area of search at Omega South Western Extension, Land north of Finches Plantation, Bold



Area of search at land to the west of Haydock Industrial Estate and land west of Millfield Lane

- 3.38 The area of search is up to 29 Ha in size and located north of the established Haydock industrial estate. It comprises of two parts, separated by Clipsey Brook, including a smaller area known as land west of Haydock Industrial Estate and a larger area known as land west of Millfield Lane. The area of search is currently designated as Green Belt land. The St Helens Borough Local Plan Submission Draft has proposed that the area of search is removed from the Green Belt and allocated for employment use (referred to as 5EA and 6EA).
- 3.39 The topography of the area of search is relatively flat and the use is currently farmland. There is a cluster of existing small-scale employment uses included in the eastern boundary of the area of search, facing Millfield Lane. Within the north western area there are approximately 10 substantial residential dwellings which would require buffering. The surrounding land uses include a golf course to the north east and Haydock Industrial estate directly to the south east.
- 3.40 To the south west construction is underway for a substantial (36.67 ha) warehousing and distribution development known as M6 Major.
- 3.41 A planning application was submitted in October 2017 for a site in the smaller area, west of Haydock Industrial Estate. The application details one 146,790 sq ft unit and three smaller units, totalling 143,575 sq ft. The application was refused planning permission.
- 3.42 The area of search is situated in the east of the Liverpool region. Accessibility to regional and national industrial markets is strong. The area of search is located ~~on~~ close to the A580 and within short proximity to the A580/M6 Junction. Any B8 development would require the delivery of an internal road network and access points to and from the site via the existing Haydock Lane spur, Millfield Lane and A580. Liverpool Road may be less suitable given residential dwellings at the south west.
- 3.43 The area of search adjoins the established Haydock industrial estate which serves the strategic regional and national market, accommodating businesses such as Sainsbury's Distributions Centre, Costco and Tuffnel's Parcel Express. These businesses benefit from a central national location, good access to the A580/M6 Junction, a strong labour catchment and large floor plate sheds. Given the strategic value of the location precinct, there are a number of hotels clustered within proximity of the M6 corridor, supporting 24-hour distribution operations.
- 3.44 The adjacent M6 Major development comprises of a 365,000 sq ft warehouse which has been pre-let by Amazon and a 525,000 sq ft speculative warehouse. The M6 Major development is Green Belt,

yet permission was granted due to a lack of available employment land and the St Helens Borough Local Plan Submission Draft proposes to remove the site from the Green Belt.

3.45 The area of search has access to a strong labour catchment including St Helens and smaller populations such as Haydock and Garswood. It is connected to public transport options at Garswood train station.

3.46 The area of search adjoins an existing industrial estate that is in high demand for large scale floorspace. It is located in the north of the Liverpool region on the M6 distribution spine that connects the region to markets in the south and north of the nation. An extension of the established Haydock industrial estate to the north would satisfy the increasing market demand given its locational assets.

3.47 **Conclusion: The area of search is strategically well positioned to accommodate the growth of the freight and distribution market in the Liverpool region in the short term. It is located on the M6 distribution spine which is experiencing market demand for big shed floorspace. Any development would require the provision of local road network and supporting utilities infrastructure.**

Figure 7: Area of search at land to the west of Haydock Industrial Estate and land west of Millfield Lane



West Lancashire Areas of Search

3.48 West Lancashire has a number of employment sites proposed for potential future employment land allocation in the West Lancashire Local Plan Review (2018). The existing allocated employment land still has some capacity for B8 development with the undeveloped sites at XL Business Park subject to planning proposals.

Area of search at Junction 3/M58

3.49 The area of search is up to 80.9 Ha and covers the north east and south east at Junction 3 on the M58 corridor. The site has been identified as a proposed future employment land allocation and is referenced EC1.1 in the West Lancashire Local Plan Review Preferred Options (2018).

~~3.50~~ The area of search is relatively flat and the M58 motorway intersects the site. It consists of various land uses, mostly agricultural with a small industrial area located south of the junction. There is a restaurant south of the junction, facing Rainford Road, as well as a small employment area. The uses to the north of the junction includes such as a fuel station and a coffee shop. There are dwellings directly to the north across Skelmersdale Road.

3.51 The area of search benefits from direct access onto the strategic network with the existing junction connection to the M58. The M58 corridor provides strong east-west connections to local and regional markets. The M58 connects to the M58/M6 Junction to the east of the site. The M6 is out of the Liverpool City Region study area; however, proximity is an asset as it broadens accessibility to markets. As a result, limited road infrastructure is required to deliver the area of search however utilities infrastructure would be required.

3.52 The area of search benefits from access to a strong labour catchment including surrounding populations of Skelmersdale, Ormskirk and Kirkby. Public transport access to the site is currently limited. Employees would be dependent on private car access unless public transport provision is made as part of development proposals.

3.53 The area of search is one of few remaining large-scale sites at a junction in the City region. The area of search has strong east west connections as it is located on the M58.

3.54 **Conclusion: The area of search is one of the last remaining large-scale sites at a junction in the City Region. There are a few existing allocated employment sites with capacity, meaning the area of search would likely experience short - medium term market demand.**

Figure 8: Area of search at Junction 3 M58



Area of search South West of Pimbo Employment Area

- 3.55 The area of search south west of Pimbo Employment Area is up to 25.4 Ha in size. The area of search has been identified in the West Lancashire Local Plan Review Preferred Options (2018).
- 3.56 The surrounding area is open farmland to the west, railway bordering the south and adjacent to the existing employment area to the east. Small portions to the north of the area of search are identified as Flood Zone 2 (approximately 8%) and 3 (approximately 2%) which are assumed as being mitigated through the development of the area.
- 3.57 The established Pimbo Industrial Estate is located directly east of the area of search. Pimbo Industrial Estate mostly contains strategic employment uses such as 3M Scott Safety, Walkers Snack Food and Procter and Gamble. These types of uses are reliant on good access to motorways and require large scale format industrial sheds to meet their operational needs. It also contains industrial uses that serve the local market such as crane hire and motor vehicle repairs.
- 3.58 Accessibility to the area of search is via internal existing roads at Pimbo Employment Area as there are no direct roads connecting the site independently to the strategic network. Any form of B8 development would require an extension from Pimbo Road in the established Pimbo Industrial Estate to the east. Development would also be dependent on the delivery of supporting utilities infrastructure.

- 3.59 The area of search is located to the south west of the established Pimbo Industrial Estate which is positioned on the southern side of the M58 corridor. The M58 corridor provides strong east-west connections to local and regional markets. The M58 connects to the M58/M6 Junction to the east of the area of search. The M6 is out of the Liverpool City Region study area; however proximity to this motorway is an asset to the site as it provides strong links to markets in the north and south of the nation.

- 3.60 The area of search will likely experience medium term market demand for B8 employment uses in light of its strategic position to the neighbouring industrial estate and the motorway network. However, demand may be tempered by the location at the rear of the estate, delaying access, and there may be some local saturation of the market if junction 3 is brought forward in tandem.

- 3.61 **Conclusion: The area of search is well positioned to accommodate strategic B8 employment uses given its location within proximity to the M58 corridor. The size of the area of search provides a natural extension south west from the established Pimbo Employment Area. It is likely that the site will experience medium term demand.**

Figure 9: Area of Search South West of Pimbo Employment Area



4 CONCLUSION

- 4.1 The areas of search assessed in Section 3 have been identified through consultation with relevant local authorities. Some of the areas have been subject to past studies commissioned by local authorities in investigating potential sites to come forward as allocated employment land. Whilst the narrative in the report considers B8 assessments of the areas of search, commercial market engagement has supported the assumption made in the Stage 1 report that demand in these locations remains for B2 manufacturing operations for around 20% of site activity. As a result, a final adjustment is made below to take account for this.
- 4.2 It has been identified that Liverpool City Region seeks a quantum of 116.8 ha of land suitable to accommodate strategic B8 industrial uses in the future to achieve the 'Do Something' scenario.
- 4.3 The complete list of sites assessed provides a total of **542.3 Ha**, however not all sites generating a positive result for suitability. There is also the need to discount some site areas as the entire site is not developable due to environmental constraints or existing structures.
- 4.4 The total developable land from the sites assessed is **378 Ha** and vary in times of delivery (unadjusted for B2 demand). Adjusting this figure by 20% to account for B2 use on the site results in **281.0 Ha** of B8 developable land. Subject to further investigation this land area is in excess of that required to achieve the 'Do Something' strategic B8 requirement and thus fulfilling future growth requirements.
- 4.5 The table below summaries the areas of search assessed positively in the assessment which can therefore be considered for future allocation of employment land for B8 use over the short (0-5 years), medium (5-15 years) and long term (15+ years), however these sites will need to be further appraised and allocated through the individual Local Authority's Local Plans.

Table 8: Potential B8 strategic employment areas

Local Authority	Site	Size (Ha)	% Lost to flooding	Net Size (Ha)	Developable B8 (Ha) 80%	Developable B2 (Ha) 20%	Deliverability
Halton	Area of search at Whitehouse Industrial Estate	71.3	3%	69.2	55.3	13.8	Phasing over short, medium and long term
Knowsley	Area of search at Halsnead Garden Village	108	10%	97.2	77.8	19.4	Medium term
Knowsley	Area of search north of A580 at Knowsley Industrial and Business Park	32.2	0%	32.2	25.8	6.4	Short term
St Helens	Area of search at Omega South Western Extension, land north of Finches Plantation, Bold	31.2	0%	31.2	25.0	6.2	Short term
St Helens	Area of search at land to the west of Haydock Industrial Estate and land west of Millfield Lane	29	0%	27.5	22	5.5	Short term
West Lancashire	Area of search at J3 M58	80.9	3%	78.5	62.8	15.7	Short - medium term
West Lancashire	Area of search South West of Pimbo Employment Area	25.4	10%	22.9	18.3	4.6	Medium term
Total		378		358.6	281.0	72.1	

4.6 **General Disclaimer**

This report has been prepared by GL Hearn Limited (GL Hearn) in favour of Liverpool City Region (“the Client”) and is for the sole use and benefit of the Client in accordance with the agreement between the Client and GL Hearn dated 2018 under which GL Hearn’s services were performed. GL Hearn accepts no liability to any other party in respect of the contents of this report. This report is confidential and may not be disclosed by the Client or relied on by any other party without the express prior written consent of GL Hearn.

Whilst care has been taken in the construction of this report, the conclusions and recommendations which it contains are based upon information provided by third parties (“Third Party Information”). GL Hearn has for the purposes of this report relied upon and assumed that the Third Party Information is accurate and complete and has not independently verified such information for the purposes of this report. GL Hearn makes no representation, warranty or undertaking (express or implied) in the context of the Third Party Information and no responsibility is taken or accepted by GL Hearn for the adequacy, completeness or accuracy of the report in the context of the Third Party Information on which it is based.

Freedom of Information

GL Hearn understands and acknowledges the Authority’s legal obligations and responsibilities under the Freedom of Information Act 2000 (the “Act”) and fully appreciates that the Authority may be required under the terms of the Act to disclose any information which it holds. GL Hearn maintains that the report contains commercially sensitive information that could be prejudicial to the commercial interests of the parties. On this basis GL Hearn believes that the report should attract exemption from disclosure, at least in the first instance, under Sections 41 and/or 43 of the Act. GL Hearn accepts that the damage which it would suffer in the event of disclosure of certain of the confidential information would, to some extent, reduce with the passage of time and therefore proposes that any disclosure (pursuant to the Act) of the confidential information contained in the report should be restricted until after the expiry of 24 months from the date of the report.