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Employment Land Review

For

South Lakeland District

On behalf of

South Lakeland District Council

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APPENDICES

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1 Introduction

1.1 LSH and ekosgen were commissioned by South Lakeland District Council to undertake an employment land review (ELR). The study will review and update the 2005 Employment Land and Premises Study. It will act as a background technical document to support the Council's Local Development Framework (LDF). In terms of employment land, this relates to land that is suitable for the following uses:

- B1 (office/light industrial/research and development),
- B2 (general industrial) and
- B8 (storage or distribution)

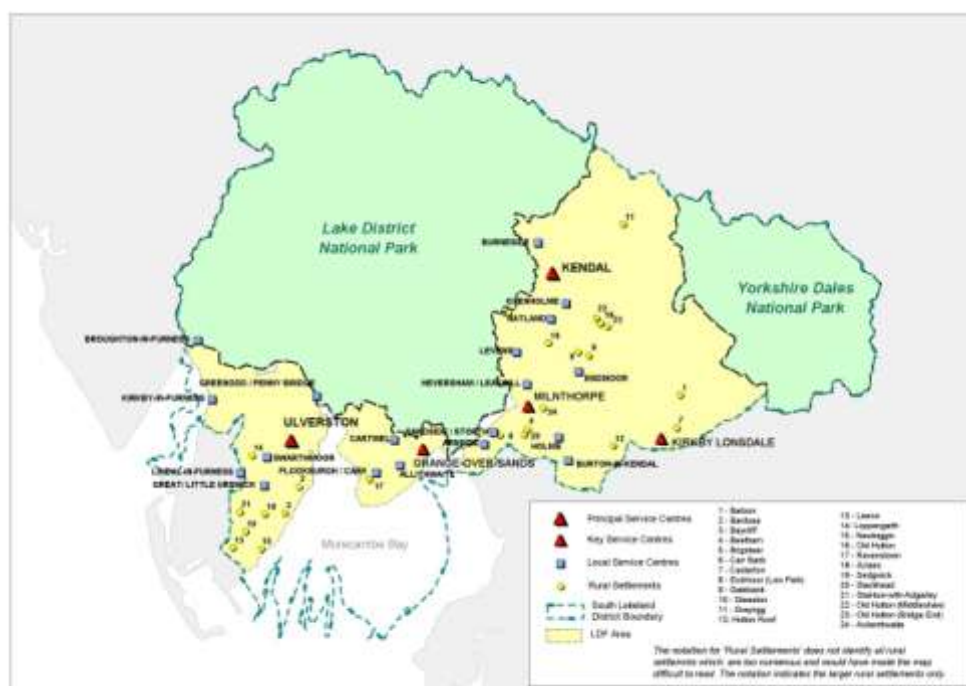
1.2 As required by the brief the study will:

- deliver a rigorous and realistic market based assessment, including credible assumptions and forecasts about economic growth and the likely demand (both expressed and latent) for B1, B2 and B8 employment land and premises in the South Lakeland District for the 15 year plan period up to 2025;
- deliver a robust review of the needs identified in the 2005 Employment Land and Premises Study including credible figures for both the annual supply of employment land (forecasted annual average land take up per annum) and the total supply required over the plan period;
- an appraisal of the local commercial property market;
- an assessment of the types of site needed for different sectors in different parts of the District including Kendal and Ulverston, as well as in smaller towns and villages;
- identify gaps in the current employment land portfolio;
- advise on the suitability, market attractiveness and deliverability of emerging option stage potential employment allocation sites;
- specifically address / advise of the need for and potential location of, sites for B8 storage and distribution use to serve the Kendal area;
- with reference to the emerging option sites, specifically address / advise on the need for a strategic employment site & a business / science park to serve Ulverston & the Ulverston area. Given economic conditions, will solely 'B' use classes be deliverable / viable? Or, is a wider range of uses needed to cross subsidise?
- comment on the relationship between the scale and growth of housing land implied in the Core Strategy and the quantum of employment land needed.
- consider the role of neighbouring planning authorities, including the National Parks, in meeting the Districts employment land needs.

- the study has been prepared in accordance with the ODPM Guidance Note: Employment Land Reviews (December 2004).

1.3 This study concentrates on that part of South Lakeland District that is outside the Lake District National Park and the Yorkshire Dales National Park as shown in Figure 1.1 below.

Figure 1.1 – The Study Area



1.4 The report is structured as follows:

- Section 2 summarises the key national and local policy context of relevance to the study;
- Section 3 details the method adopted to complete this study;
- Section 4 provides an economic profile based on past trends and comparisons with selected benchmark areas;
- Section 5 reviews the existing supply of employment land;
- Section 6 provides an overview of South Lakeland District's Local Commercial property market;
- Section 7 provides an assessment of current and future demand for employment land and premises, through future employment projections and analysis of past take-up;
- Section 8 provide a synopsis of the types of site needed for different sectors in different parts of the District including Kendal and Ulverston as well as the smaller towns and villages;

- Section 9 reviews the suitability, market attractiveness and deliverability of emerging option stage potential employment allocation sites; and,
- Section 10 presents our conclusions and recommendations grounded by our detailed, geographical analysis of quantified supply and demand in terms of current, latent and future business needs.

2 National, County and District Policy Appraisal: Key Considerations

Introduction

- 2.1 This section provides an overview of the strategic and policy context for employment land in South Lakeland District (outside the National Parks). It also includes a review of key research reports including those supporting national and local policy developments and identifies the key strategic development proposals that are likely to impact on the demand for and supply of employment land in the District. It contains the following key elements:

- national policy, including planning policy guidance notes issued by the government;
- local policy, including the saved and extended policies in the South Lakeland Local Plan and the adopted Core Strategy; and,
- other key documents, including relevant LDF evidence base studies, SPD, emerging policies and plans, property market reports and previous survey and appraisal work undertaken within the District.

National policy

PPS1 – Delivering Sustainable Development

- 2.2 PPS1 highlights the need for positive and proactive planning to achieve the creation of sustainable communities. It is stated that planning should facilitate and promote sustainable patterns of urban development by:

- Making suitable land available for development in line with economic, social and environmental objectives to improve the quality of life;
- Contributing to sustainable economic growth;
- Protecting and where possible enhancing the natural and historic environment;
- Ensuring high quality development through good design; and,
- Ensuring that development supports existing communities and contributes to the creation of safe, sustainable and liveable communities with good access to jobs and key services.

- 2.3 The Government is committed to promoting a strong, stable and productive economy that aims to bring jobs and prosperity for all. Consequently, planning authorities should have regard to the importance of encouraging industrial, commercial and retail development. At the same time, planning policies should enable the provision of a suitable mix of housing including adequate levels of affordable housing. Delivering sustainable development requires planning policies to:

- Promote urban regeneration;
- Promote regional, sub-regional and local economies;
- Promote communities which are inclusive, healthy, safe and crime free;
- Bring forward sufficient land of suitable quality in the right locations (housing, industry, retail and commercial development);
- Give high priority to ensuring access for all to jobs, health, education, shops, leisure and community facilities;
- Focus developments that attract a large number of people, especially retail development, in existing centres;
- Protect and conserve natural resources;
- Promote the more efficient use of land; and,
- Reduce the need to travel.

PPS4 – Industrial & Commercial Development and Small Firms

2.4 PPS4 emphasises the need for a positive proactive planning for economic development and the need for greater integration between the planning system and wider economic strategies, programmes and initiatives. The guidance requires:

- all local authorities to undertake an assessment of the demand for and supply of employment land with regular reviews at least every three years;
- Following the demand-supply assessments and reviews, local authorities should consider de-allocating or allowing change of use of allocated employment land if there is no reasonable chance of the site coming forward in the medium term;
- Guided by reasoning and appropriate criteria, local authorities should adopt policies to safeguard employment land. This should not be used as a means to hoard employment land and should be subject to regular review (see above);
- The Use Class Order can hinder policies aimed at supporting particular sectors or types of businesses. However, local authorities should consider identifying sites for specific activities and types of organisations (e.g. small firms) where this is consistent with economic and regeneration priorities for the area; and,
- Comprehensive monitoring systems should be introduced, not only to assess the stock of employment land but also evaluations of the effectiveness of economic policies.

PPS7 – Sustainable Development in Rural Areas

2.5 PPS7 advises that in their Local Development Documents (LDDs), planning authorities should set out their policies for allowing some limited development in, or next to, rural settlements that are not designated as local service centres, in order to meet local business and community

needs and to maintain the vitality of these communities. In particular, authorities should be supportive of small-scale development of this nature where it provides the most sustainable option in villages that are remote from, and have poor public transport links with, service centres. Furthermore, in meeting the economic needs of rural areas, local planning authorities should:

- Identify in LDDs suitable sites for future economic development, particularly in those rural areas where there is a need for employment creation and economic regeneration; and
- Set out in LDDs their criteria for permitting economic development in different locations, including the future expansion of business premises, to facilitate healthy and diverse economic activity in rural areas.

National Planning Policy Framework

- 2.6 The Government launched for consultation the draft National Planning Policy Framework (the NPPF) in July 2011. The draft NPPF streamlines national planning policy into a consolidated set of priorities to consider when planning for and deciding on new development. It aims to ensure that planning decisions reflect genuine national objectives - such as the need to safeguard the natural environment and to support sustainable local growth - while allowing for local authorities and communities to produce their own plans, reflecting the distinctive needs and priorities of different parts of the country.
- 2.7 The draft identifies that local councils should be positive and proactive in encouraging sustainable growth, addressing barriers to investment and setting a clear economic vision and strategy for their area based on understanding of business needs across their areas.

Employment Land Reviews: Guidance Notes, 2004

- 2.8 Employment Land Reviews: Guidance Notes (Department of Communities and Local Government¹, 2004) issued a guide for planning authorities in respect of assessing the demand for, and supply of, land for employment. It focuses upon helping authorities assess the suitability of sites for employment development, safeguard the best sites in the face of competition from other higher value uses and help identify those which are no longer suitable for employment development which should be made available for other uses.
- 2.9 The guide identifies a three step process in undertaking employment land reviews and the methodology for this South Lakeland Employment Land & Premises Review is based upon it. The three stages are as follows:

¹ Previously Office of the Deputy Prime Minister (ODPM)

- Stage 1 – Taking stock of the existing situation, including an initial assessment of ‘fitness for purpose’ of existing allocated employment sites;
- Stage 2 – Creating a picture of future requirements by using a variety of means to assess the scale and nature of likely demand for employment land and the available supply in quantitative terms²; and,
- Stage 3 – Identifying a ‘new’ portfolio of sites through a more detailed review of site supply and quality and identify and designate specific new employment sites in order to create a balanced local employment land portfolio.

Strategic and Local Policy

The Regional Spatial Strategy for the North West

The Regional Spatial Strategy (RSS), whilst still legally part of the development plan, the Localism Act 2011 will abolish it later in 2012. A Department of Communities and Local Government letter dated 6th July which was sent to all Chief Planning Officers commenting on revoking the Regional Strategies and essentially states that no weight should be attached to the RSS with immediate effect.

The Cumbria and Lake District Joint Structure Plan

- 2.10 The Cumbria and Lake District Joint Structure Plan (JSP) is the statutory document which provides a strategy and policies for the development and use of land within Cumbria. A key function of the JSP is to make sure that there is an adequate supply of land for a variety of business uses, in the most appropriate locations.
- 2.11 The Structure Plan currently identifies the five largest settlements (Kendal, Ulverston, Grange over Sands, Kirkby Lonsdale and Milnthorpe) in the district as Key Service Centres providing a range of services for both local communities and visitors. The JSP identifies that the size and role of key service centres varies considerably across the county. Local Development Frameworks will need to identify the range and scale of development required to support the role of key service centres and ensure that land is brought forward accordingly.
- 2.12 Policy ST6 stipulates that the Local Development Documents will assess the roles and functions of settlements and identify the range and scale of development appropriate to each service centre, having regard to the needs of the locality, the capacity of existing services to accommodate development, and the size, character and environmental capacity of the settlement to accommodate further development. Developers, investors and service providers

² Assessment methods identified include economic forecasting, consideration of recent trends and/or assessment of local property market conditions.

will need to have regard to these other settlements in addition to those defined as key service centres in making investment decisions.

2.13 Policy ST7 'Development to Sustain Rural Communities' states that small scale development to help sustain local services, meet local needs or support rural businesses will be permitted in towns and villages defined as local service centres in Local Development Frameworks. It will be the exception for new development to be located in the open countryside'. Structure Plan Policy ST7 states that exceptionally, new development will be permitted in the open countryside where:

- It has an essential requirement for a rural location, which cannot be accommodated elsewhere (such as mineral extraction);
- It is needed to sustain existing businesses;
- It provides for exceptional needs for affordable housing;
- It is an extension of an existing building; or
- It involves the appropriate change of use of an existing building to business/employment use.

2.14 Local Development Frameworks are required to bring forward sites to meet the requirements of Policy EM13. The amount of land required by policy EM13 to be available takes into account the previous take up of employment land within each of the Sub County Areas and Employment Market Sector definitions. Policy EM13 sets the following requirements for South Lakeland (outside the National Parks):

| Sub County Area | Employment Land Market Sectors | Period | | |
|---------------------------------|--------------------------------|------------------|------------------|------------------|
| | | 2001 – 2006 (HA) | 2006 – 2011 (HA) | 2011 – 2016 (HA) |
| Furness and West Cumbria | | | | |
| South Lakeland | Strategic Employment Site | 0 | 5 | 0 |
| | Local Employment Site | 3 | 3 | 3 |
| | Business / Science Park | 3 | 3 | 3 |
| South & East Cumbria | | | | |
| South Lakeland | Strategic Employment Site | 5 | 5 | 0 |
| | Local Employment Site | 5 | 5 | 5 |
| | Business / Science Park | 3 | 3 | 3 |

2.15 Strategic Employment Sites are defined as sites over 5ha developed in large plots, with good links to key service centres and the primary route network and suitable for Class B1 b and C,

B2 and B8 development along with ancillary B1a. Business Parks are defined as sites over 1ha, with good links to key service centres and the primary route network and suitable for Class B1 development. Local Employment Sites are defined as sites under 5ha with good links to service centres, adequate transport access and suitable for all B use classes.

- 2.16 Policy EM14 states that outside the National Park, the development of existing employment site, premises and land allocation for non-employment of mixed uses will be considered where it can be demonstrated that over the life of the Structure Plan period that either the site is likely to remain unsuitable for employment purposes or the retention of the site or premises in employment use is not needed to meet the requirements of Policy EM13 including the requirement that each Key Service Centre retains an appropriate supply of land within the Local Employment site Market Sector.
- 2.17 Policy EM15 states that outside Key Service Centres developments which promote business and employment opportunity will be permitted where they are of a scale and type sympathetic to the character of the area within which they are proposed.

Cumbria County Council Local Transport Plan

- 2.18 The Local Transport Plan (LTP) for Cumbria is a statutory planning document that sets out the Council's vision, strategy and policies for transport. It details how roads, footways, cycleways, rights of way and bus and train services in Cumbria will be improved and managed. The new Plan (LTP3) contains a strategy for the next 15 years, 2011 to 2026, the policies to implement the strategy and a rolling programme of implementation plans showing where funding will be directed.
- 2.19 Work is progressing on the 3 year Implementation Plan and it together with the policies should be available in early 2012.
- 2.20 The LTP3 strategy identifies that priorities in South Lakeland include:
- supporting the ability of Kendal, Ulverston and Grange over Sands to accommodate employment and housing growth in line with the emerging Local Development Framework Kendal Futures economic development plans; and
 - tackling traffic growth in Kendal to enable future development and improve air quality; and
 - to work to maximise economic benefits in the towns and villages of South Lakeland (LTP3, Page 20).

South Lakeland LDF Core Strategy

- 2.21 The Council adopted its LDF Core Strategy in October 2010. The Core Strategy provides the broad planning strategy for South Lakeland District outside the National Parks for the period up to 2025. It draws together strategies of the council and other organisations whose activities have implications for the development and use of land when adopted. It puts the aspirations of the Sustainable Community Strategy into effect - seeking to create a sustainable district that is the best possible place to live, work and visit.
- 2.22 Policies relevant to this study include:
- Core Strategy Policy CS7.1 – Meeting the Employment Land Requirement sets out an overall employment land need of 4 Ha per annum between 2010 and 2025 (over the plan period this equates to 60 ha)
 - Core Strategy Policy CS7.2 – Type of employment land required and sectoral split, identifies a need for strategic employment sites and business/science parks in Kendal and Ulverston and a range of local employment sites across the rest of the District
 - Core Strategy Appendix 1, Part 8, sets out site criteria and a sequential approach to the identification of strategic employment sites.

South Lakeland LDF Land Allocations DPD

- 2.23 The Council is advancing rapidly with its Land Allocations DPD, which will allocate land for new housing, employment and other uses to meet communities' needs in accordance with the overall requirements set out in the adopted Core Strategy. This document will also propose the safeguarding of a number of existing employment sites. The Council consulted upon emerging options for the Land Allocations DPD from January to April 2011. Further consultation on alternative sites put forward by respondents to the emerging options consultation, the time span of the DPD and the approach to development in small villages, hamlets and open countryside was held from July to September 2011. The Council intends to publish the DPD in February 2012 and adopt it in October 2012.
- 2.24 The objective of the Land Allocations DPD is to achieve the Core Strategy vision and objectives by identifying:
- Sites for housing, employment and other development;
 - Design and infrastructure requirements for major sites;
 - Land to be safeguarded for recreation and other purposes;
 - Green Gaps to prevent settlements losing their identity;
 - Development boundaries for towns and large villages;

- Town Centre and Primary Shopping Areas which are the preferred locations for town centre and shopping uses.

2.25 This document will not allocate land within the Kendal Canal Head Area. Land uses in this area will be determined through the Kendal Canal Head Area Action Plan.

2.26 Once adopted, the Allocations DPD will replace a number of policies in the South Lakeland Local Plan.

2.27 Sites identified for employment and mixed use in the emerging Land Allocations DPD have been assessed as part of this study.

South Lakeland Local Plan

2.28 The policies in the South Lakeland Local Plan are being replaced coinciding with adoption of replacement policies in the Development Plan Documents that make up the Local Development Framework.

2.29 The Local Plan states that the majority of employment land in the District should be situated in, or on the edge of, Kendal, Ulverston, Grange-over-Sands, Milnthorpe and Kirkby Lonsdale and outside the National Parks and Area of Outstanding Natural Beauty. The Local Planning Authority has also considered a number of additional factors in arriving at its allocations for employment use, notably:

- The physical characteristics of the sites together with their ability to absorb new development without spoiling the landscape character;
- The level of service provision and the infrastructure which exists (sewage treatment, land drainage, road junction improvements required etc);
- The availability and marketability of the site to the private sector.

2.30 New Employment Sites: Sites at Shenstone and Parkside Road in Kendal are allocated in the Local Plan for business park/office developments – Parkside Road is now developed out. In Ulverston a wide range of small and medium sizes sites are allocated on the south side of the town – only the site on West End Lane and a plot on phase A of Low Mill Business Park remains undeveloped.

2.31 A strategic employment site is allocated in the Local Plan to the south east of Milnthorpe Station adjacent to the former Nestle food processing plant. This allocation does not include the former Nestle building.

- 2.32 Elsewhere in South Lakeland a number of small Local Plan allocations have been made in, and close to, rural settlements where access by roadside is suitable (some of these have not been developed to date).
- 2.33 Existing Employment Areas: The intensification of use and extension of existing premises in South Lakeland currently provides a significant amount of new employment and business growth and the Council will continue to give favourable consideration to expansion schemes in appropriate locations. Rather than lose valuable older premises the Council states that they will look favourably on proposals for redevelopment where it would not be detrimental to the landscape, townscape or surrounding land uses (South Lakeland Local Plan Policies E4 and E5 and their reasoned justification).
- 2.34 Employment Development in Rural Areas: The Local Plan states that the Council will take a positive attitude towards small workshop schemes, office and research establishments attracted to rural locations. This may include the conversion of large institutional or similar buildings where it does not detract from the amenity of residential areas, is not in the undeveloped countryside, is not detrimental to the character and appearance of the landscape or settlement, is not damaging to nature conservation interests and does not give rise to unacceptable traffic generation.

South Lakeland M6 Junction BE Corridor Study 2003

- 2.35 Business Environments were commissioned to assess the potential to provide competitive advantage to South Lakeland through a strategic economic development site within the M6 Corridor. Three motorway junctions (junctions 36, South Lakeland; 38, Tebay; and 39, Shap) and the Mainline Business Park (Milnthorpe) were assessed.
- 2.36 The study concludes that of the three motorways junction locations considered within the South Lakeland corridor only junction 36 makes sense for further investigation as a strategic site location. It also identifies that examination of the Mainline Industrial Estate at Milnthorpe confirms that whilst the development has a role to play within the local economy at the present time, it has limited attraction at the sub-regional level and no realistic chance of achieving a step-change to being a strategic regional site.
- 2.37 The BE Study identifies that the area lacks quality sites and premises which a strategic development site at or near junction 36 could remedy. The study questions the demand for industrial (B2) and storage and distribution (B8) development at this location generally, identifying offices (B1) along with ancillary leisure uses and rural diversification as offering potential demand.

The advisory Ulverston Canal Head and Corridor Masterplan

- 2.38 Capita Symonds was commissioned by the Ulverston and Low Furness Partnership to undertake a masterplanning exercise for the Ulverston Canal Head and Canal Corridor. The masterplan provides a strategy for the ongoing regeneration of Ulverston. This included options for the re-development of the Canal Head area as well as looking at the wider benefits of land-use re-allocation and associated landscaping to provide a gateway into the town and the Furness Peninsula.
- 2.39 The masterplan proposes a mixed-use development providing employment, tourism and recreation facilities and some housing within an enhanced environment. The proposals can be described in relation to specific geographical locations within the study area:
- Canal Head and land to the north of the canal – key strategic sites
 - Mixed-use area – adjoining North Lonsdale Road to east of the railway bridge – local significance
 - Steel Street and Kennedy Street areas – local significance
 - The Elms – local employment opportunity
 - Canal Foot – recreational potential
 - Land to the north of the canal – informal recreation with some commercial opportunities at Rame Farm
- 2.40 The masterplan has not been adopted and has only advisory status.

South Lakeland Employment Land and Premises Study 2005

- 2.41 The South Lakeland Employment Land and Premises Study prepared by Arup follows the first two stages of the ODPM Employment Land Reviews: Guidance Note. The two stages provide:
- Stage 1 – assessment of the quality and quantity of existing employment sites, along with demand forecasting work; and
 - Stage 2 – appraisal of how the provision of employment land supply (as at 31st March 2004), could meet projected future demand for the ten-year period from 2006 to 2016.
- 2.42 The 2005 study did not complete Stage 3 of the ODPM guidance note, the identification of a new portfolio of site allocations to meet gaps in the existing and predicted employment land and premises portfolio.

2.43 The brief identifies that there is now a need to refresh and update the 2005 study to address the following issues;

- Changes since 2005 including the impact of the 2008 financial crisis;
- Needs arising in the period 2016-25 which are not addressed and a commitment in the Core Strategy to address this gap;
- Doubts expressed by the Core Strategy Inspector about the quantity of employment land needed, which he considered to be at the high end of potential growth scenarios, given events since 2005. The B1, B2, B8 split, and in particular, the proportion identified for B8 use and its relationship with the Council's aspirations for growth.

Employment Land Position Statement 2008

2.44 During 2009/10 as part of the land allocations process, SLDC carried out a further qualitative and quantitative assessment of existing employment sites. This involved an assessment of potential employment sites, including sites submitted through consultation and an appraisal of existing allocations against site evaluation criteria. The criteria included availability, deliverability, sustainability and appraisal against the sequential test. Potential strategic employment sites were assessed against the site criteria and sequential approaches identified in Appendix 1 of the Core Strategy.

South Lakeland: Knowledge Based Employment Land Search and Assessment

2.45 In August 2007 Knight Frank, Arup and Carigiet Cowen were instructed by the Northwest development Agency (NWDA) to undertake an assessment of the sites suitability for knowledge based employment use. The consultant team assessed the employment sites previously considered in other employment land documents by South Lakeland and invited agents, land owners and developers to propose sites. The sites were visited and stakeholder consultation was undertaken with key statutory organisations. The study then ranked the sites with the best suited for Knowledge Based use considered to be; Canal Head in the centre of Kendal, Milnthorpe Road (East), Milnthorpe Road (West) and Burton Road (South) on the periphery of Kendal. The sites that were considered to be the most severely constrained for this use were Prizet, Burton Road (North) Kendal, Plumgarths and Junction 36 of the M6, the main reason for the constraints was the availability of utilities and topography.

Relevant Economic Policy

Local Enterprise Partnerships

2.46 Local Enterprise Partnerships (LEPs) were established by the Government to take forward national economic development priorities at the local level through a private sector approach.

The priorities of Cumbria's LEP are therefore important to consider when examining likely future economic trends in South Lakeland. The Cumbria LEP submitted The Cumbria Local Enterprise Partnership Submission in September 2010. It involves an ambitious plan to grow the Cumbria economy *'to have one of the fastest growing economies in the UK'*.

2.47 The LEP submission identified the following areas of activity which present particular opportunities for the local area:

- specialist manufacturing; tourism and hospitality;
- the expansion and diversification of the nuclear industry;
- the low carbon economy;
- diversification from the public sector leading to new enterprise growth;
- agriculture and other land and sea based industries;
- construction; social enterprises;
- food and drink; and
- creative and digital.

2.48 In particular, the plan highlights the importance of specialist manufacturing (such as automotive engineering, subsea technologies and hydro power turbines), the low carbon economy (especially the Energy Coast initiative and commitments to nuclear new build and offshore power generation) tourism and agriculture as the best opportunities for business growth within Cumbria.

Cumbria Economic Strategy

2.49 The Cumbria Economic strategy, and the Cumbria sub-regional action plan, have a major focus on exploiting opportunities emerging from energy and climate change imperatives and the tourism sectors. The strategy highlights the following sectors as key to local economic growth (in order of priority): specialist manufacturing; tourism; food and drink; digital, cultural and creative; the outdoor / rural economy; and energy and environmental technologies.

The Eden and South Lakeland Forward Delivery Plan 2010-2020

2.50 Eden and South Lakeland Forward Delivery Plan 2010-2020 highlights the need to strengthen the role of flagship centres (Kendal), increasing business productivity, diversity and

competitiveness and supporting the growth of the tourism sector as key to the economic prosperity of the area.

- 2.51 The document highlights the potential of South Lakeland to contribute to the low carbon economy, in particular through the renewable energy sector (e.g. the development of hydro and wind farms and growing fuel for biomass facilities). It also outlines the potential to explore how the area can further expand its environmental technologies sector and exploit the potential to attract professional businesses to service the nuclear industry and Energy Coast initiative.

Economic Regeneration Priorities of the District Council

- 2.52 Key regeneration priorities highlighted by South Lakeland District Council include: the creation of employment sites and premises; the restructuring of agriculture including local produce; the development of employment and business skills; attracting inward investment of new businesses; enhancing rural services, including broadband; investing in key service centres; and strengthening and modernising the tourism industry.
- 2.53 The LDF and Lake District Economic Futures Study have a strategic approach to growing the tourism sector within the local economy. These support the provision of tourist attractions and infrastructure within the principal, key and local service centres as well as sensitive new tourism development of a nature that could not be accommodated within or on the edge of an existing centre.

Kendal Economic Regeneration Action Plan

- 2.54 In June 2007, Douglas Wheeler Associates and their team published the Kendal Economic Regeneration Area Action Plan. They were commissioned by the Kendal Regeneration Steering Group which comprises Cumbria County Council, South Lakeland DC, NWDA, Cumbria Vision, Kendal Town Council, The CBI, Chamber of Commerce and Federation of Small Business. The Action Plan identified 5 key themes to strengthen Kendal as a key service centre, they are:
- Adding Value: Moving Businesses Up the Value Chain - Identified a need to provide more specialised and diversified goods and services, with a focus on added value such as the knowledge economy and higher wage employment opportunities;
 - Investing in the Town Centre: Strategic Projects – Promotion of the independent retailers that make Kendal special whilst tackling the vacancy rates. A need to have a integrated approach that promotes a series of related town centre projects.
 - Boosting Enterprise & Business Birth Rate: Encourage new businesses and improve the survival rates

- Promoting Excellent Economic Infrastructure: Urgent need to agree a programme of short, medium, and longer term priorities to include the provision of new employment sites.
- Ensuring Leadership: Resources & Legitimacy – Ensuring there is a coordinated approach between the public and private sector and ensuring strong leadership to ensure the action plans delivery is essential.

2.55 In terms of key projects the most relevant to this study was the aim to provide priority employment sites and premises. They specified a need for 3.25 ha of new business land creating 8500sq.m of new business space and 300 new FT/PT jobs.

3 South Lakeland Employment Land Review Methodology

- 3.1 The methodology for the study was developed to take into account relevant Government, local and other guidance on economic development and employment land studies as well as the experience of the consultant team in undertaking similar research elsewhere in the country. The methodology was discussed and agreed at an inception meeting with a Steering Group for the study.
- 3.2 Following a comprehensive review of existing documentation, policies and strategies and the economic profile of the District, the following method was adopted. This method follows the 2004 ODPM Employment Land Reviews: Guidance Note and the specific requirements of the study brief.

STAGE ONE – Taking Stock of the Current Situation

Examine the Current Employment Land Supply

- 3.3 The ‘fitness for purpose’ of the existing employment land portfolio was initially assessed through both a desk top study and site inspections. A schedule of sites for inspection was prepared and agreed with the Steering Group. Cumbria County Council’s annual Employment Land Availability Schedules provide an up to date picture of available employment land and commitments across the LDF area and formed the basis of the schedule.
- 3.4 The site appraisal procedure involved a scoring system that was applied in relation to the principal characteristics of the sites. The proforma considers:
- Ease of access
 - Barriers to development (deliverability)
 - Development sustainability
 - Potential outputs
 - Market constraints
- 3.5 A comprehensive database has been prepared for all employment land commitments of approximately 0.3 ha and above. This database also records the results of the site appraisal procedure.

STAGE TWO – Creating a Picture of Future Requirements

Property Market Overview

- 3.6 The market supply and demand analysis assesses the areas property market. Consideration is given to property prices, rental levels and the amount of vacant land and property. A development assessment considers the regional context, physical constraints, and nearby developments in assessing potential developer or investor interest. The market overview:
- assesses the supply of employment land, including B1, B2 and B8 premises within the study area;
 - reviews employment land supply against annual take up of land to establish the potential level of required supply;
 - assesses the suitability of the committed sites (local plan allocations and sites with planning permission for B1, B2 and/or B8 development) for employment purposes in terms of size, location, accessibility and marketability; and
 - provide an overview of the employment market within the study area, providing commercial views on supply and demand within the area.
- 3.7 This combination of research, market knowledge and in-depth expertise of what works in the South Lakeland markets, provides commercial advice to the employment land review.

Employment Sector Forecasts

- 3.8 The ODPM guidance recommends that, due to the inherent flaws of relying too heavily on any one predictive method, a variety of quantitative and qualitative assessment methods should be undertaken for such a study, with an objective view taken at the end of the stage as to the most appropriate way forward. Step 3 provides the information needed for the qualitative assessment. The approaches to the quantitative assessment are provided below.

Quantitative employment land projections

- 3.9 Existing employment forecasts per sector in the 2005 study and our own economic profile are used to consider the demand for premises in the in the study area in the short, medium and long term which will enable us to verify demand for employment land up to 2025.

Historic take-up approach

- 3.10 We recognise that quantitative modelling is only one way of calculating employment and land projections, and to further the robustness of the assessment we have applied other methodologies, notably the assessment of past take up rates of employment land over time.

- 3.11 A detailed review of Employment Land Monitoring Schedules and discussion with local stakeholders has been undertaken to establish past trends and patterns reaching back over the past twelve years. We have explored trends in terms of the availability of business premises within the sub-region with reference to publications such as published property registers and explored the extent to which employment land and sites have been 'lost' to other land uses – such as residential or retail.
- 3.12 Our assessment of demand for employment land and premises is also be informed by an appraisal of strengths, weaknesses, opportunities and constraints relating to the study area as a location for different types of employment development.

Creating a Picture of Future Requirements

- 3.13 The outputs of employment models are, by their very nature, only as good as the inputs and experience suggests that a pragmatic and practical approach, which combines local knowledge and expertise with a contextual model that can simply and effectively deliver the required outputs. To gain value from the employment model the outputs have been considered in the context of the local, regional and national employment densities, plot ratios and vacancy rates, thus refining and developing the output to accord with, and to deliver the expectations of the brief.
- 3.14 These outputs have been used to model the impact of these sectoral changes upon the requirement for B1, B2 and B8 sites. A synopsis of the types of site needed for different sectors in different parts of the LDF area including Kendal, Ulverston, Grange over Sands, Milnthorpe and Kirkby Lonsdale as well as the smaller settlements is provided.
- 3.15 Translating employment forecasts into employment land requirements is based upon the procedure outlined in the ODPM guidance, English Partnership's *Employment Densities: a Full Guide* to provide documented advice on the necessary assumptions and employment densities to be used. Standard employment densities have been used for offices, industrial and distribution to translate employment predictions into floorspace projections and to translate floorspace into employment land.
- 3.16 The specific need for sites for B8 storage and distribution use to serve the Kendal area is assessed based on our professional experience, consultation with locally active commercial property agents, South Lakeland District Council Economic Development Officers and scrutiny of the Cumbria County Council's Annual Monitoring Schedules and records of enquiries to the District Council for employment sites and premises.

- 3.17 The need for a strategic business / science parks to serve Kendal and the Kendal area and Ulverston and the Ulverston area is also assessed. Again this has been done through consultation with locally active commercial property agents, South Lakeland District Council Economic Development Officers, other local stakeholders and the economic profile and market assessment.

STAGE THREE – Identifying a New Portfolio of Employment Land

Matching Supply and Demand

- 3.18 An assessment of the future employment potential and capacity of existing and potential employment locations sites within the LDF area has been completed to compare demand for sites and premises with available opportunities.

- 3.19 The types of opportunities considered include:

Existing sites

- 3.20 The extent to which demand for different types of employment development can be met by the existing stock of vacant land and premises and employment land allocations within the LDF area is assessed. Opportunities to accommodate additional employment development at existing locations are identified. The flexibility for change/redevelopment within designated employment areas by considering the condition of property, vacancy rates and the competitiveness of existing businesses is also reviewed.

Employment land allocations / emerging sites through the LDF allocations process

- 3.21 Market appraisal of the type/mix of uses which could be accommodated on employment sites (existing allocations and commitments and emerging sites through the LDF allocations process) is provided.
- 3.22 The development capacity of these sites taking account of any previous work used to inform the structure plan and the outputs from our assessment of demand for employment land and different types of premises is considered.

Employment and economic potential offered by employment sites

- 3.23 Taking account of the demand assessment and through the application of appropriate employment densities broad estimates of the employment potential associated with existing and potential employment areas are provided.
- 3.24 Whether existing and potential employment opportunities within the LDF area are likely to match the employment needs of the local labour force is assessed.

Sites for B8 storage and distribution in the Kendal area

- 3.25 Consideration is given to the specific need for sites for B8 storage and distribution in the Kendal area and suitable sites identified.

Ulverston strategic employment site & science / business park

- 3.26 Consideration is given to the specific need for sites for a strategic employment site and science / business park in the Kendal and Ulverston areas and suitable sites identified.
- 3.27 A series of conclusions grounded by our detailed, geographical analysis of quantified supply and demand in terms of current, latent and future business needs are presented in Section 10.

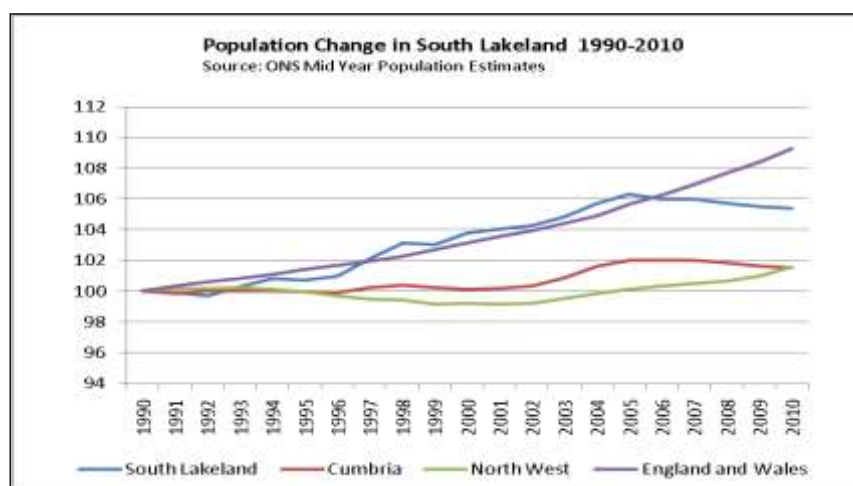
4 Economic Overview

Introduction

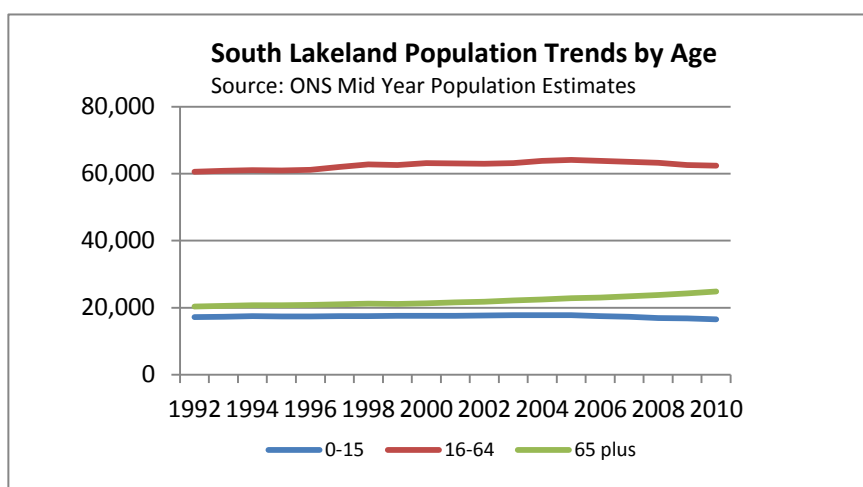
- 4.1 This section of the report provides an overview of the South Lakeland economy, highlighting recent performance and trends, key strengths and weaknesses. The review provides the evidence base from which forecasts for future sector growth and associated need for employment land have been made.
- 4.2 The section of the report draws on published data sources including the Inter Departmental Business Register, Annual Business Inquiry and Labour Force Survey. The majority of the economic data is only available at the local authority level as opposed to the study area which excludes the parts of South Lakeland within the Lake District National Park to the north / west of the district and part of the Yorkshire Dales National Park to the east. The data is therefore presented for south Lakeland as a whole throughout this section, although when developing employment land requirements based on economic forecasts account will be made of the limited amount of B1, B2 and B8 land use outside of the LDF area.
- 4.3 The section also draws on a review of a range of background information including the Cumbria Local Economic Assessment, the Eden and South Lakeland Business Needs Report, Cumbria LEP and economic forecasting reports.

Population and Demographic Overview

- 4.4 South Lakeland is the largest district in Cumbria, covering a mainly rural area of 1,551 sq km in the southern part of the County. It contains some of the Lake District and Yorkshire Dales National Parks which include many of the most well-known centres of tourism in the North of England. The parts of the District within the National Parks, however, are excluded from the study area for this Employment Land Review.



- 4.5 South Lakeland has experienced significant population growth since the 1990s, in excess of elsewhere in Cumbria, although following a peak in 2005, it has plateaued over the past five years. The 2010 population of the district is estimated at 103,700.
- 4.6 South Lakeland has an ageing population and the majority of population growth has been driven by an expanding 65 plus age group. This is reflective of national trends and an indication of the area's attractiveness to retirees. This group now accounts for 23.9% of the population, significantly higher than Cumbria (20.5%) and nationally (16.6%).



- 4.7 The working age population within South Lakeland has declined steadily over the past five years and now represents just 60.2% of the population, less than in Cumbria (62.6%) and nationally (64.7%). The cost and availability of housing compared to wage levels and the lack of high quality employment opportunities has in part led to a steady reduction in the working age population and number of families in the area over the past decade.
- 4.8 These population trends will have an impact on the provision of local services with an increased demand for care and health services and potentially lower demand for schools provision.
- 4.9 The area has low levels of deprivation (ranked within the 20% least deprived areas nationally³), although geographical isolation including access to services and employment opportunities is an issue which affects some parts of the district.

³ Source: Index of Multiple Deprivation 2010

Economy Overview

4.10 Outside of the two National Parks where the economy is based principally on the tourism and agricultural sectors, the district has a diverse economy, focused primarily around the following two principal areas:

- **Kendal**, a market town that is both the administrative centre and largest town in the district (population of nearly 30,000). The area has a tradition of industry (in the past this was based primarily on the cloth and shoe making industries and woollen goods) and is home to a variety of businesses including, engineering, paper making and food production companies. It is also famous for the production of Kendal mint cake and tobacco products.
- **Ulverston**, a market town which is a centre for specialist manufacturing including LEDs, Lighting, oil and gas industry and light manufacturing and is increasingly renowned for specialist shops and festivals. The town is home to an important supply chain linked to BAE systems shipbuilding in Barrow in Furness and is also the home of Glaxosmithkline. The now disused canal has been identified as a potential brown field development area especially at Canal Head, adjacent to the A590. The town also has a good technological base and has growing links to the offshore oil and gas industry.

4.10.1 The principal economic centre of South Lakeland is Kendal, whilst Ulveston also plays an important economic role in the south west of the district. The Cartmel Peninsula, where the main centres are Grange-over-sands and Cartmel, is also renowned as a tourism and leisure destination including a popular race track.

The Local Workforce

4.11 The key characteristics of the local workforce include:

- High levels of self-employment and part-time workers;
- A skilled and adaptable labour force with a strong work ethic; and
- Low workplace and resident earnings, and high levels of out commuting.

4.12 South Lakeland has high levels of self employment⁴ (16%) when compared with both Cumbria (10.8%) and nationally (9.2%). In addition, 32.4%⁵ of residents work on a part-time basis, five

⁴ Source: Annual Population Survey, 2011

⁵ Source: Annual Survey of Hours and Earnings, 2010

percentage points higher than the national average. These trends are heavily influenced by the large number of family run farms, attractiveness of the area as a lifestyle choice and lack of larger companies. With regards to location of work, a larger proportion of South Lakeland residents (15.1% of the working age population⁶) work from home, compared to the County average (12%).

- 4.13 The area has high educational standards and the working age population is extremely well qualified (over 40% are qualified to NVQ Level 4 plus compared with just 31% nationally⁷). In addition, unemployment is low (less than half the UK and North West averages⁸) and over 80% of the working age population are economically active, higher than elsewhere in Cumbria and nationally⁹. The economic activity rate in South Lakeland has been consistently higher than nationally over the past decade.
- 4.14 Median average earnings for residents are 10% less than nationally and 5% less than elsewhere in the North West, whilst resident earnings compare even less well – 17% less than nationally and 10% below the North West. The difference in resident and workplace earnings reflects the large levels of out-commuting of higher-paid professionals to some of the major service centres elsewhere in Cumbria and the North of England. A larger proportion of South Lakeland residents (9.2% of the working age population¹⁰) work outside of the District when compared with the average (4.9%).

Recent Employment Trends

- 4.15 South Lakeland is the second largest economy in Cumbria, providing employment for over 56,000 people in 2010.

| Employment Change in Cumbrian Districts 2000-2010 | | | | |
|---|-----------------------|-----------------------------|-------------|-------------|
| Area | Total Employment 2010 | Total Employment change (%) | | |
| | | 2000-2004 | 2004-2008 | 2008-2010 |
| Allerdale | 40,779 | 8.1 | -1.1 | -1.7 |
| Barrow-in-Furness | 27,647 | 14.3 | 2.1 | -8.6 |
| Carlisle | 59,363 | 12.8 | -3.0 | -1.5 |
| Copeland | 29,523 | 8.0 | -4.1 | -3.7 |
| Eden | 32,108 | 15.3 | 5.3 | 2.7 |
| South Lakeland | 56,465 | 14.5 | -4.9 | -1.2 |
| Cumbria | 245,885 | 12.2 | -1.7 | -2.0 |
| Source: Experian Economic Forecasts for Cumbria, January 2010 | | | | |

⁶ Source: Cumbria Local Economic Assessment, 2010

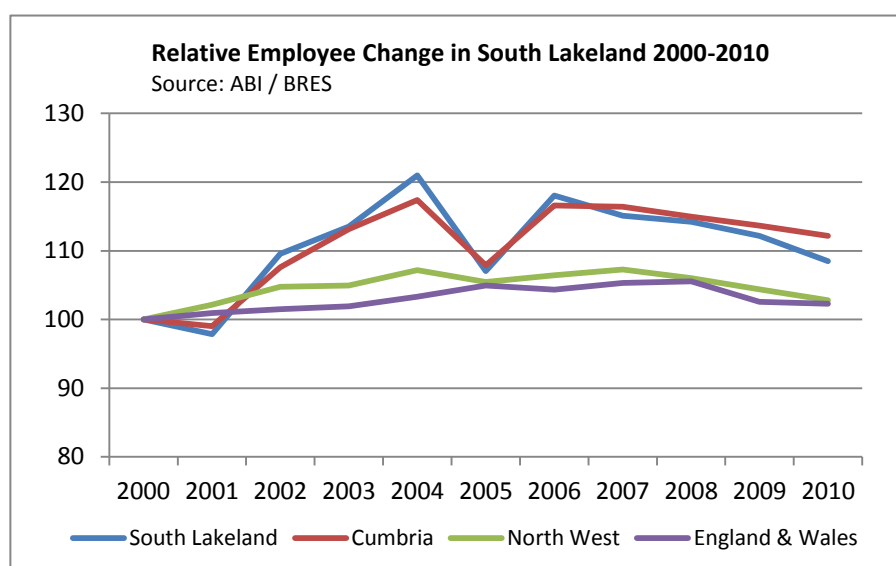
⁷ Source: Annual Population Survey, 2011

⁸ Source: ONS Model Based Estimates of Unemployment, 2011

⁹ Source: ONS Annual Population Survey, 2011

¹⁰ Source: Cumbria Local Economic Assessment, 2010

- 4.16 The area experienced significant economic growth at the start of the last decade, with employment growth of nearly 15% between 2000 and 2004, a trend mirrored elsewhere in Cumbria, notably Barrow in Furness and Eden.
- 4.17 This was followed by a decline of nearly 5% during 2004-2008. Initial data however suggests that South Lakeland has been more resilient during the economic downturn of 2008-2010, and has not seen the scale of employment losses in other parts of Cumbria.
- 4.18 In spite of the recent decline in employment, over the ten years from 2000-2010 both South Lakeland and Cumbria have outperformed both the national and regional economy in terms of employment growth.



The Business Base

- 4.19 The Inter Departmental Business Register (IDBR), published by the Office for National Statistics, provides the most up to date information on businesses within the district drawing on VAT trader and PAYE employer information. The table overleaf summarises the business base within South Lakeland and the breakdown of nearly 7,000 businesses in the area.
- 4.20 There are a number of distinctive features of the South Lakeland business base which reflect the rural nature of much of the economy. These include:
- A very large number of **agricultural and land based business**, over 1,000 in total, some one in six of all businesses.

- A significant base of **tourism and leisure related businesses**, including 820 in retail, 760 in accommodation and food services and 430 in arts, entertainment and recreation.
- An important number of business in **knowledge based industries** including 665 in professional, scientific and technical activities, 425 in business administration and support service and 195 in information and communications.
- A small but significant **manufacturing base**, with some 340 companies.

| South Lakeland Businesses 2011 | | | | | |
|--|----------------|--------------|-----------------------------------|--------------|-------------------|
| Sector and Indicative Use Class | South Lakeland | | Cumbria % | North West % | England & Wales % |
| | No | % | | | |
| Agriculture, forestry & fishing | 1,025 | 14.9 | 17.8 | 4.4 | 4.8 |
| Retail | 820 | 11.9 | 11.0 | 12.6 | 11.1 |
| Construction | 780 | 11.3 | 10.7 | 10.1 | 10.7 |
| Accommodation & food services | 760 | 11.0 | 9.0 | 6.7 | 6.3 |
| Professional, scientific & technical | 665 | 9.6 | 10.1 | 12.8 | 14.0 |
| Arts, entertainment, recreation & other | 430 | 6.2 | 5.9 | 7.0 | 7.1 |
| Business admin & support services | 425 | 6.2 | 6.1 | 6.8 | 7.1 |
| Production | 340 | 4.9 | 4.9 | 6.4 | 5.8 |
| Health | 310 | 4.5 | 4.8 | 6.5 | 5.7 |
| Wholesale | 230 | 3.3 | 3.1 | 5.3 | 5.0 |
| Property | 220 | 3.2 | 2.4 | 3.6 | 3.5 |
| Education | 200 | 2.9 | 2.7 | 2.8 | 2.6 |
| Information & communication | 195 | 2.8 | 2.2 | 4.6 | 6.5 |
| Motor trades | 180 | 2.6 | 3.0 | 3.3 | 3.0 |
| Transport & storage (inc. postal) | 145 | 2.1 | 3.2 | 3.4 | 3.2 |
| Finance & insurance | 125 | 1.8 | 2.1 | 2.9 | 2.6 |
| Public administration and defence | 45 | 0.7 | 1.0 | 0.9 | 1.0 |
| TOTAL | 6,895 | 100.0 | 100.0 | 100.0 | 100.0 |
| Source: Inter Departmental Business Register 2011 | | | | | |
| Higher than average representation | | | Lower than average representation | | |

4.21 The table overleaf provides a detailed breakdown of employment within South Lakeland, drawing on the most recent data from the Business Register and Employment Survey. It shows a number of distinctive features, including:

- An exceptionally high level of employment in **accommodation and food services**, 7,287 employees, almost one in six of all employment and two and a half times the equivalent national figure

- A very large employment base in **wholesale and retail, repair of motor vehicles** – almost 10,000 jobs and one in five of all employment
- Significant public **sector employment**, notably 5,609 in human health and social work and 4,825 in education.
- Significant number in manufacturing (5,019) and construction (3,041), both of which are in excess of the equivalent regional and national figures. The area has particular manufacturing strengths in wood and paper, food and beverage and electrical manufacturing.
- Low numbers and in some case very low numbers in a number of the **knowledge based service industries** including finance and insurance (639), administrative and support services (1,713) and information and communications (775). These are key sectors which will be important to the future growth and resilience of the South Lakeland economy.

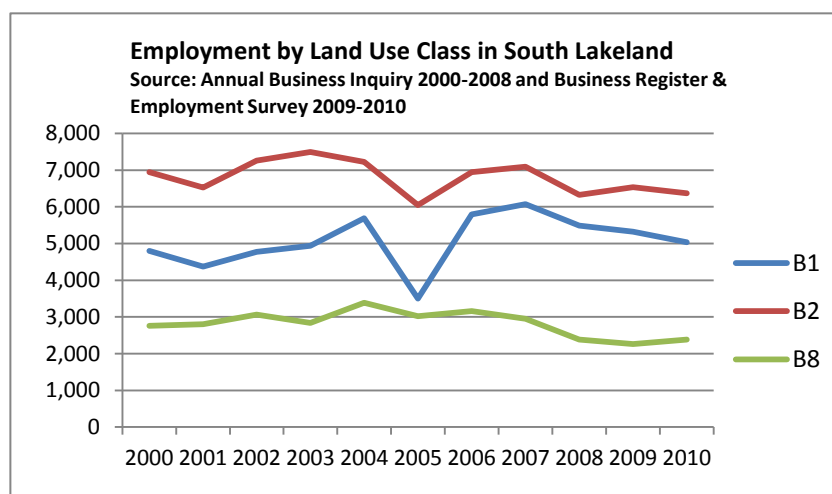
| South Lakeland Employment 2010 | | | | | |
|--|------------------------------------|--------------|-----------------------------------|--------------|-------------------|
| Sector | South Lakeland | | Cumbria % | North West % | England & Wales % |
| | No | % | | | |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 9,988 | 20.7 | 17.7 | 16.5 | 16.3 |
| Accommodation and food service activities | 7,287 | 15.1 | 9.8 | 6.7 | 6.6 |
| Human health and social work activities | 5,609 | 11.6 | 13.4 | 14.2 | 12.5 |
| <i>Manufacturing - food and beverage</i> | 879 | 19.0 | 15.1 | 16.7 | 17.8 |
| <i>Manufacturing - wood and paper</i> | 891 | 19.3 | 9.1 | 5.7 | 6.1 |
| <i>Manufacturing - metals</i> | 376 | 8.1 | 35.1 | 17.0 | 15.7 |
| <i>Manufacturing - electrical</i> | 893 | 19.3 | 5.0 | 9.8 | 5.9 |
| <i>Manufacturing - other</i> | 1,577 | 34.2 | 35.7 | 50.8 | 54.5 |
| Manufacturing - Total | 5,019 | 10.4 | 15.6 | 10.0 | 8.7 |
| Education | 4,825 | 10.0 | 8.5 | 8.8 | 9.2 |
| Construction | 3,041 | 6.3 | 6.0 | 5.0 | 4.8 |
| Professional, scientific and technical activities | 2,728 | 5.6 | 5.6 | 6.9 | 7.5 |
| Administrative and support service activities | 1,713 | 3.5 | 4.7 | 7.7 | 7.9 |
| Arts, entertainment and recreation | 1,688 | 3.5 | 2.4 | 2.4 | 2.5 |
| Other service activities | 1,454 | 3.0 | 2.1 | 2.3 | 2.2 |
| Transportation and storage | 1,368 | 2.8 | 4.4 | 4.4 | 4.5 |
| Public administration and defence; compulsory social security | 893 | 1.8 | 4.3 | 5.8 | 5.4 |
| Information and communications | 775 | 1.6 | 1.6 | 2.5 | 3.9 |
| Real estate activities | 751 | 1.6 | 1.4 | 1.5 | 1.7 |
| Other Sectors | 588 | 1.5 | 1.5 | 2.3 | 2.7 |
| Financial and insurance activities | 639 | 1.3 | 1.2 | 3.3 | 3.8 |
| TOTAL | 48,368 | 100.0 | 100.0 | 100.0 | 100.0 |
| Source: Business Register and Employment Survey 2010 (*figures exclude farm agriculture) | | | | | |
| | Higher than average representation | | Lower than average representation | | |

4.22 The data shows the reliance on the following key sectors for employment:

- Wholesale, retail and tourism (accounts for over a third of employment);
- Education and health (broadly in line with the national average);
- Manufacturing (10% of employment, in excess of the national average but less than elsewhere in Cumbria).

4.23 While tourism and recreation are significant industries in South Lakeland this is likely to be of less relevance to demand for employment land given the policy focus on B1, B2 and B8 land and the exclusion of the area within the two national parks where such industry is particularly strong.

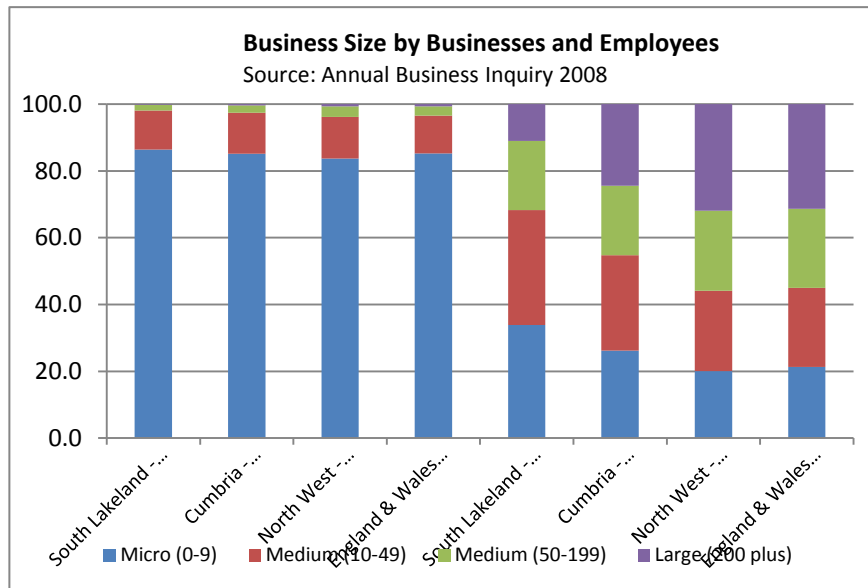
4.24 The table below translates sectoral employment data to use classes to provide an indication of employment change in B1, B2 and B8 use classes over the past decade within South Lakeland.



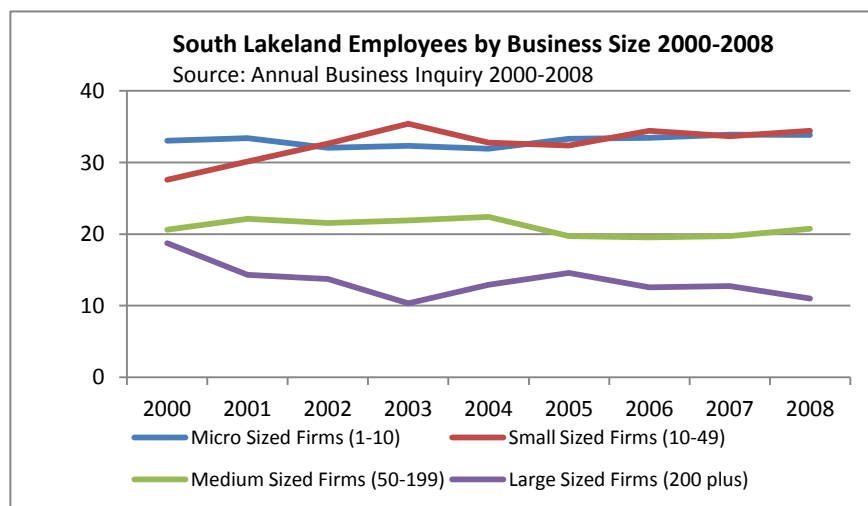
4.25 Currently just over 6,000 people are employed within the district in sectors which are traditionally associated with B1 land uses, 5,000 people are employed in B2 sectors and just over 2,000 people are employed within B8 sectors. The majority of people are employed within sectors that come under other uses classes, highlighting the importance of sectors such as retail, tourism, public administration education and health to the South Lakeland economy. Trends have seen a steady decline in employment within B2 sectors, a rise in B1 employment between 2000-2007 followed by a reduction during the economic downturn of 2008-2010. Employment within B8 sectors remained similar throughout the period 2000 to 2007, although this experienced substantial job losses during 2008 and 2009.

Business Size and Enterprise

- 4.26 As with many other sparsely populated, rural areas, South Lakeland has a major reliance on small and micro sized businesses as well as self-employed individuals as summarised in the chart below. Over 90% of businesses in the district employ less than five people, and many operate below the VAT registration threshold. The area is also home to a large number of lifestyle businesses, many of whom operate from their homes.



- 4.27 The chart overleaf outlines the increasing reliance on smaller and micro sized firms for employment opportunities over the past decade. The proportion of employment from medium sized firms has remained similar over this period, while there has been a major contraction the large businesses which accounted for nearly 20% of all employment in 2000, a figure which nearly halved by 2008.



- 4.28 The number of VAT/PAYE enterprises in the district fell between 2008 and 2010 during the recent economic downturn. Despite this recent decline, on the whole South Lakeland has a very high rate of new business formation.
- 4.29 Whilst South Lakeland has relatively few major employers, it is home to a varied range of companies including a limited number of large businesses such as GlaxoSmithKline, Farley Health Products (HJ Heinz) and Lakeland Limited. In addition, there are a number of locally rooted major businesses including Gilbert Gilkes and Gordon, Expro Connectors, Windermere Lake Cruises, Mclures, Oxley Developments, James Cropper Plc, English Lakes Hotels Ltd, MARL International Ltd and Bells of Lazonby.

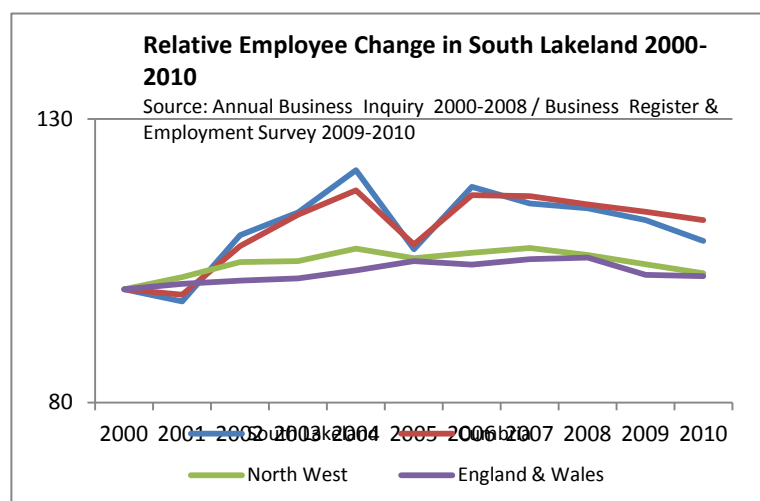
Economic Sector Trends

- 4.30 The table below summarises the recent sector trends within South Lakeland over the period 2000-2010 utilising data from the ABI and BRES.

| Employment Change by Sector in South Lakeland 2000-2010 | | | | |
|--|-----------------------|-----------------------------|-------------|-------------|
| Sector | Total Employment 2010 | Total Employment change (%) | | |
| | | 2000-2004 | 2004-2008 | 2008-2010 |
| Accommodation, food & beverage | 6,852 | +15.2 | +9.7 | -11.3 |
| Retail trade | 6,455 | +15.8 | -9.6 | -7.9 |
| Health | 5,429 | +45.8 | -16.9 | +21.6 |
| Business services | 4,892 | +15.4 | +1.3 | -10.4 |
| Education | 4,731 | +13.4 | +2.6 | +1.9 |
| Manufacturing | 4,553 | -3.0 | -14.0 | -1.6 |
| Wholesaling | 2,604 | +20.3 | -20.5 | +2.6 |
| Construction | 2,436 | +47.2 | +9.1 | -15.0 |
| Arts, ent. & leisure | 2,106 | +117.7 | +35.7 | -38.0 |
| Other sectors | 1,787 | +41.3 | -46.4 | +35.7 |
| Transport, courier & warehousing | 1,298 | +7.2 | -33.2 | -0.6 |
| Public admin | 893 | -2.3 | -29.8 | -14.7 |
| Other personal service activities | 751 | +206.7 | -38.3 | -0.3 |
| TOTAL | 44,787 | 21.9 | -7.4 | -5.0 |
| Source: Annual Business Inquiry 2000-2008 / Business Register and Employment Survey 2009-10 | | | | |

- 4.31 Key features include:
- Exceptional growth in **health related** employment and to a lesser degree **education**.
 - Strong **growth on accommodation, food and beverages** and **arts, entertainment and leisure**, with some recent decline off-setting some of the gains.

- 4.32 Jobs losses in the second half of the decade off-setting many of the gains in the first half. The table highlights the economic growth experienced during the period 2000-2004 across a number of sectors. The importance of tourism has grown over the past decade. According to research, the number of tourists visiting South Lakeland increased by 8% between 2000 and 2009, supporting a net increase of 1,241 jobs. This is reflected in employment increases between 2000 and 2008 in sectors such as accommodation, food and beverage, and arts, entertainment and leisure (although there has been a recent decline in light of the economic climate during 2008-2010).
- 4.33 The chart below highlights some of the trends within the key sectors of relevance to the employment land study – manufacturing, construction, business services and wholesaling and transport.



- 4.34 Manufacturing employment has declined significantly over this period, although there has been a period of relative stabilisation during the past three years. The business services sector saw growth between 2005 and 2008, although since 2007 the sector has lost approximately 1,000 employees. The construction sector has experienced significant growth during this period, whilst both the transport and warehousing and wholesale sectors have been declining since 2006.

Employment by Location

- 4.35 The data within this section has been presented at a South Lakeland level, reflecting the availability of economic data at a local authority level. However, when using economic analysis to assist with forecasting future land requirements, it is also important to consider the geographical distribution of employment within the District. This is particularly important for this study given that some of the local authority area (the two National Parks) is excluded from the Employment Land Review.

- 4.36 The table below provides an overview of location of employment within South Lakeland. This demonstrates the importance of Kendal in employment terms – the town and its immediate hinterland accounts for just over one third of total employment within the district.

| Approximate Employment by Location in South Lakeland | | |
|---|---------------------------|--------------------------|
| Location | Approximate Employment No | Approximate Employment % |
| Kendal and Hinterland | 16,573 | 34.3% |
| Ulverston and Hinterland | 5,151 | 10.7% |
| LDF area excl Kendal and Ulverston | 13,153 | 27.2% |
| Outside of the LDF Area | 13,489 | 27.9% |
| Total South Lakeland | 48,366 | 100.0 |
| Source: Business Register and Employment Survey 2010 | | |

- 4.37 Whilst the majority of South Lakeland's B1, B2 and B8 employment is located within the LDF area, some employment in relevant sectors is found within the National Parks. An analysis of the employment within South Lakeland by sector in 2010 has been undertaken by Super Output Area (SOAs) level. These SOAs have been matched to the LDF area as accurately as possible (the boundaries do not exactly match) to provide an approximate breakdown of employment which is located within South Lakeland but outside of its LDF area. The LDF area accounts for just over 70% of employment within South Lakeland as summarised in the table overleaf.
- 4.38 The National Park areas have particular strengths in tourism and retail – sectors which are not relevant for the employment land review. Therefore, the proportion of employment in B1, B2 and B8 uses within the LDF area is larger than 70%. The manufacturing sector accounts for the majority of B2 uses with approximately 90% of this sector located within the LDF area. The B1 use class comprises elements of a variety of sectors including financial and insurance activities and other service activities which typically have circa 80% of employment located within the LDF area. A large proportion of B8 uses are accounted for by the wholesale element of the wholesale and retail trade sector, with the remainder accounted for by transport and communications. With B8 uses typically requiring large premises close to key transport links, it is anticipated that at least 90% of this sector is located within the LDF area as apposed to within the National Parks. These proportions will be applied to the economic forecasts to provide a more accurate picture of land requirements based on economic data for the LDF area as apposed to the district as a whole.

| Approximate Employment in South Lakeland by LDF Area | | | |
|--|---------------------------------|----------------------------|------------------------------------|
| Sector | Total Employment South Lakeland | Amount / % within LDF Area | Amount / % outside of the LDF Area |
| Wholesale and retail trade, repair of vehicles | 9,988 | 71.6 | 28.4 |
| Accommodation and food service | 7,287 | 41.5 | 58.5 |
| Human health and social work activities | 5,609 | 86.1 | 13.9 |
| Manufacturing | 5,019 | 89.9 | 10.1 |
| Education | 4,825 | 72.1 | 27.9 |
| Construction | 3,041 | 77.3 | 22.7 |
| Professional, scientific & technical activities | 2,728 | 81.5 | 18.5 |
| Administrative & support service activities | 1,713 | 72.6 | 27.4 |
| Arts, entertainment and recreation | 1,688 | 70.0 | 30.0 |
| Other service activities | 1,454 | 73.7 | 26.3 |
| Transportation and storage | 1,368 | 71.0 | 29.0 |
| Public admin, defence; social security | 893 | 87.1 | 12.9 |
| Information and communication | 775 | 80.3 | 19.7 |
| Financial and insurance activities | 639 | 83.9 | 16.1 |
| Real estate activities | 751 | 62.3 | 37.7 |
| Other Sectors | 588 | 73.6 | 26.4 |
| TOTAL | 48,366 | 72.1 | 27.9 |

Economic SWOC Analysis

- 4.39 Drawing on the evidence provided within this section, the table below provides an overview of the strengths and weaknesses of the local economy.

| South Lakeland Economy – Key Facts | |
|--|--|
| Economic Strengths <ul style="list-style-type: none"> • Growing population. • High quality of life, low crime rate, outstanding natural environment and attractiveness of the area • Principal towns providing employment opportunities for local people. • High education standards, high quality local schools and colleges and an exceptionally well qualified workforce. • Strengths in tourism, cultural attractions, recreation and local products (food and drink, forestry and agriculture). • Evidence of environmental technology clusters, particularly in Kendal and Ulveston. • A few important industrial employers. • Some strong supply chain businesses with links to major employers such as BNFL and BAE Systems. • High rates of new formation. • Presence of the M6, West Coast Main Line and Cumbria Coast Railway. | Economic Weaknesses <ul style="list-style-type: none"> • Shortage of employment land ready for use. • Falling working age population. • Lower than average workplace earnings. • Limited numbers of well paid jobs • Declining industrial sector. • Reliance on declining public sector employment. • Number of premises no longer fit for purpose. • Lack of medium to large businesses in the district. • Some isolated parts of the district experiencing disadvantage in accessing services. • High levels of business closure. • Weak infrastructure in parts, e.g. broadband and mobile phone networks. |
| Economic Opportunities <ul style="list-style-type: none"> • The development of high value manufacturing / environmental technology cluster in Kendal and Ulverston. • Increasing demand for local products - food and drink, forestry and agriculture sectors. • Increasing demand for health and care • Increased demand for quality tourism and leisure • Opportunities in new and emerging sectors for the area - nuclear power, low carbon and renewable energy. • Growth of the Energy Coast Low Carbon/energy enterprise zone. • Potential in the cultural and creative industries sector given the quality of the area's cultural attractions. • Exploiting excellent transport links (M6 and West Coast Mainline). | Economic Challenges <ul style="list-style-type: none"> • Structural economic changes affecting established industry. • Impacts of public sector funding cuts. • Competition from elsewhere for tourist markets. • Meeting demand for supply of sites for modern business premises and housing. • Continued loss of young people from the area due to absence of quality local job opportunities and high house prices. . • The future sustainability of agriculture and primary production. • The sustainability and viability of key local service centres given competing centres outside of the local area. • Offsetting any continued losses in the manufacturing sector by jobs in the service sector (e.g. retail and tourism). |

Conclusions

- 4.40 South Lakeland plays an important role within the Cumbria economy, with nearly 7,000 businesses employing over 50,000 people, accounting for almost one quarter of the County economy. It is an important tourism location, a major centre for health and educational services and has a large number land based enterprises as well as an important industrial business group. The majority of businesses within B1, B2 and B8 use classes are located within the South Lakeland LDF area.
- 4.41 The analysis of socio-economic trends has revealed the following issues which should be considered when determining South Lakeland's employment land requirements:
- A growing population will require/generate more housing and local jobs.
 - The need and demand for more service and knowledge based employment requires an increase in the provision of readily available employment land and premises in South Lakeland. This is consistent with the LDF and its focus on new B1 use business / science parks.
- 4.42 A review of the socio-economic evidence also supports the conclusion within the LDF that there is suppressed need for the provision of readily available employment land and premises in South Lakeland.

5 The Current Employment Land Supply

Introduction

- 5.1 This section provides a comprehensive review of the existing committed supply of employment land within the LDF area. That is existing Local Plan allocations and sites benefiting from planning permissions for employment ('B' Use Classes). The results relate to a comprehensive review of employment sites undertaken as part of the "taking stock of the existing situation" process.
- 5.2 Cumbria County Council undertakes an annual review of Employment Land Availability across the County. According to the County Council's Employment Land Availability Schedules, correct as of March 2011, it is estimated that South Lakeland District (outside of the National Parks) – the LDF area – has approximately 16.04 hectares of allocated / committed employment land over 0.25 hectares, relating to 12 sites.

Table 5.1: Available Land by Type and Use Classes Order 2010/11

| Site Ref | Settlement | Address | Size (ha) | Proposed Uses | Planning Permission | Local Plan Allocation |
|----------|------------------|---------------------------------------|--------------|----------------|---------------------|-----------------------|
| 5/211 | Burton in Kendal | Land at Clawthorpe Hall | 0.54 | B1a | 0.54 | 0.00 |
| 5/017 | Flookburgh | Moor Lane | 1.10 | B1 abc, B2, B8 | 0.00 | 1.10 |
| 5/167 | Gatebeck | Fallbeck | 0.62 | B1 abc, B2 | 0.00 | 0.62 |
| 5/168 | Grange | Allithwaite Road | 1.10 | B1 abc, B2 | 0.00 | 1.10 |
| 5/002 | Kendal | Shap Road Industrial Estate | 0.68 | B1 abc, B2, B8 | 0.00 | 0.68 |
| 5/073 | Kendal | Shenstone House | 2.20 | B1 abc | 2.20 | 0.00 |
| 5/204 | Kendal | Riverside Business Park, Natland Road | 0.29 | B1a, B8 | 0.29 | 0.00 |
| 5/278 | Kendal | Boundary Bank, Boundary Bank Lane | 0.26 | B1c | 0.26 | 0.00 |
| 5/007 | Milnthorpe | Station Yard (Mainline Business Park) | 4.50 | B1 abc, B2, B8 | 1.55 | 2.95 |
| 5/009 | Storth | Quarry Lane | 1.20 | B1 abc | 0.00 | 1.20 |
| 5/016A | Ulverston | Low Mill Tannery, West End Lane | 0.75 | B1 abc, B2, B8 | 0.00 | 0.75 |
| 5/016B | Ulverston | Low Mill Tannery, West End Lane | 2.80 | B1 abc, B2, B8 | 0.00 | 2.80 |
| | | Total Land | 16.04 | | | |

Source: Cumbria County Council Employment Land and Floorspace Availability Schedules

- 5.3 Of the 12 sites, four are in Kendal, two in Ulverston, and one site each in Burton in Kendal, Flookburgh, Gatebeck, Grange, Milnthorpe and Storth. Ten of the sites are identified as local employment sites, defined in the adopted Local Plan as being able to accommodate a range of types and sizes of employment and warehousing. Other commercial activities may also take place on these sites where appropriate.

- 5.4 One site, Shenstone House, Kendal, is identified as a business park. Business parks are designated in the Joint Structure Plan as accommodating B1 uses over 1 hectare in size, with good access to the Primary Route Network and served by public transport, cycle and pedestrian networks. The sites should also have good links/proximity to key service centres, and be based upon a masterplan with a very high standard of design and landscaping. The Business Parks must also have potential for links to higher education institutions and knowledge based industry.
- 5.5 One site, Station Yard, Milnthorpe is identified as a strategic employment site in the Local Plan. The Joint Structure Plan for Cumbria suggests that Strategic Employment Sites should be large sites over 5 hectares close to the primary route network, with the potential to be served by public transport. They should also have good links / be in close proximity to key service centres.
- 5.6 Sites that are under construction, areas of sites under construction which form part of larger allocations, and own use sites are excluded from this list as they are not generally considered to be available to any other occupier or developer. Sites of less than 0.25 hectares have also been excluded from this list as they fall below the minimum size threshold adopted in this study.

Site Assessment

- 5.7 Site visits were conducted to each of these sites. A site proforma was completed for each site recording the physical characteristics of the site, suitability for development, observations of development or marketing activity and perceptions about potential market interest. Results of these site visits are recorded in the sites schedule at Appendix A.
- 5.8 The remainder of this section presents a short critique of each site.

Grange

- 5.9 Allithwaite Road (ELA ref. 5/168 and Allocation DPD Ref. R350M) is identified in the Local Plan as a local employment site suitable for B1 and B2 development. The site was previously used for refuse destruction and is now vacant. Reuse of this site would not adversely spoil the landscape character. The site is located to the west of Grange, a key service centre, and is accessed via the B5277 off the A590. The existing vehicular access is very narrow. The site is believed to be suitable to meet local employment needs in Grange.

Kendal

- 5.10 Shenstone House (ELA ref. 5/073) is allocated in the Local Plan as a business park site suitable for B1 a, b and c development. Planning permission was granted in 2003 and renewed in 2007 for business park development. The site is north of Back Lane at its junction with the A6 / A591 slip road. Significant access improvements would be necessary to serve new development. Shenstone House is in existing office use and neighbouring properties are in residential use. There are no signs that the site is being marketed for employment development and may not be available for redevelopment.
- 5.11 Riverside Business Park is a successful employment development on the site of the former K Shoes factory on Natland Road. Further development land (ELA ref. 5/204) had planning permission for class B1a and B8 development. This site could form a further phase of the development. It appears to be suitable for local employment in Kendal.
- 5.12 Shap Road Industrial Estate (ELA ref. 5/002) is an infill plot on existing industrial estate. It was allocated in the Local Plan as a local employment site. Planning permission has been granted (ref. 2008/0239) for a car showroom, workshop and associated car parking on the northern part of this site. The application suggests that development will be delivered in two phases, with the car showroom forming the first phase on the northern part of the site and the workshop the second phase on the southern part of the site. Development of the first phase of development (on the northern part of the site) appears to be underway although the second phase (on the southern part of the site), which we understand was not part of the original application appears to be still available for development.
- 5.13 Boundary Bank (ELA ref. 5/278) has planning permission for B1c development. The site is to the rear of the Kendal Fell Business Park and appears to be a suitable extension to it. The site is being marketed by Peill and Co (along with available units on the Kendal Fell Business Park). The site appears to be suitable and available for local employment in Kendal.

Milnthorpe

- 5.14 Grisleymires Lane (ELA ref. 5/171) is identified in the Local Plan as a local employment site suitable for B1 and B2 development. The site has planning permission for 10 business / industrial units. Serviced plots have been provided on the site (the site is being marketed as Parkhouse Lakeland Estate and is adjacent to the Bridge End Business Park), but take-up has been slow. Milnthorpe is a key service centre and is well related to the region's highway network. The site is clearly available for employment development and despite slow take-up it appears a suitable site to meet local employment needs in Milnthorpe.

- 5.15 Station Yard, now known as Main Line Industrial Estate, is a strategic site for South Lakeland. 1.55 hectares with the benefit of planning permission for B1, B2 and B8 development is available to develop immediately and is being actively marketed. A further 2.95 hectares in separate ownership is allocated for B1, B2 and B8 development. There are servicing issues regarding drainage and issues relating to access with a potential ransom over access to the 2.95 hectares.

Ulverston

- 5.16 Low Mill Tannery, West End Lane is identified in the Local Plan as a local employment site suitable for B1, B2 and B8. It is located to the south east of Ulverston a Principle Key Service Centre in South Lakeland. The site is split into three phases, two of which (Phases 1 and 3) are referred to in Cumbria County Council's Employment Land and Floorspace Assessment. Phase 2 has now been developed out and is occupied by Expro Connectors.
- 5.17 What's left of Phase 1 (ELA ref. 5/016A and Allocation DPD Ref. EN22) is 0.75ha serviced plot. The majority of Phase 1 ((Low Mill Business Park), a previously developed site, which was subject to a development brief (September 1997) and investment from NWDA and SLDC to reclaim its derelict core, has been developed. The vacant plot has a made access to the north west of Low Mill Business Park.
- 5.18 Phase 3 (ELA Ref. 5/016B and Allocation DPD Ref. EN23) is a 2.80ha Greenfield site currently used for agriculture and will only be brought forward for development once Phase 1 is occupied. Both phases appeared suitable to meet local employment needs in Ulverston, although Phase 3 has very soft ground conditions.

Burton in Kendal

- 5.19 Clawthorpe Hall (ELA ref 5/211) is a rural business centre providing a mix of small office units and a conference suite. Planning permission exists for development of vacant land to the south of the hall to extend the existing office facilities. The planning permission has not been implemented, although the sites appears to be suitable and available for B1 a development.

Gatebeck

- 5.20 This small allocation is an extension to the existing Fallbeck employment site. It is a rural site allocated in the Local Plan as a local employment site for B1 abc and B2 development. Development will round off the existing employment site and provide potential expansion for the existing operations.

Flookburgh

- 5.21 Moor Lane (ELA site ref. 5/017 and Allocation DPD Ref. EN25) is identified in the Local Plan as a local employment site suitable for B1 and B2 development. The site is located to the south west of Moor Lane Business Park, on Moor Lane (accessed via the B5278 and A590) to the south of Flookburgh a local service centre, in the west of the District. The site is a Greenfield site currently used for agriculture. The site if developed would be suitable to meet local employment demand in Flookburgh and surrounding Cartmel Peninsula.

Storth

- 5.22 Quarry lane is allocated in the Local Plan as a local employment site suitable for B1 a, b and c development. Existing access is poor, although a number of dated buildings on the sites are in employment use. The site is not being actively marketed and availability is unclear.

Summary

- 5.23 Most of the existing commitments are small in size and will serve only local employment requirements. A number of these sites are within rural settlements, where levels of local demand will be limited.
- 5.24 A number of sites have been allocated but there appears to be some reluctance to actively offer them on the open market.
- 5.25 Main Line Industrial Estate east of Milnthorpe is being openly marketed for larger industrial requirements but this is for design and build units on a leasehold basis.
- 5.26 In Milnthorpe, Parkhouse Lakeland Estate, Grisleymires Lane provides a range of development plots for B1 and B2 use, but take-up has been slow.
- 5.27 It is considered there are virtually no industrial sites in Kendal which are available for immediate purchase and development. The remaining plot at Shap Road Industrial Estate is one small site that appears to be available.
- 5.28 A small plot is available at the Riverside Business Park for B8 use incorporating ancillary B1a. The site also appears suitable for B1b, B1c and B2 development.
- 5.29 In Ulverston, a single plot remains on phase 1 at Low Mill Tannery, whilst phase 3 is also undeveloped. Low Mill Tannery is allocated for B1, B2 and B8 uses. The remaining plot on phase 1 is a serviced plot with a made access and is available for development. Services and access are required for phase 3, which is also constrained by very soft ground conditions.

- 5.30 Of the sites identified in the County Council's Employment Land and Floorspace Assessment – Available Land commitments (Local Plan allocation and sites with valid planning permissions at 12 months ending 31 March 2011) it is considered that there is no site capable of attracting or accommodating major employment development in the LDF area.

6 Property Market Overview

- 6.1 This section provides a property market context for the Employment Land Study Review by providing an overview of the office and industrial property market across South Lakeland (excluding the Lake District and Yorkshire Dales National Parks).
- 6.2 Our approach has been to undertake a desk-based review of the local property market from sources such as Focus, Estates Gazette and the local press and then to supplement this with local knowledge gleaned through consultations with local agents that are currently active in the area. The desk based research and consultation with local agents was undertaken in late November and early December 2011. The market overview is followed by an analysis of enquiries for employment land and premises received by South Lakeland District Council and a review of employment land availability and completions.

Geographical Market Overview

Kendal

- 6.3 Kendal is the main economic centre for South Lakeland and plays a key role in the provision of commercial floorspace. The main focus of activity has traditionally been around the northern edge of the town, but highways constraints have isolated this area and the southern approach to the town is now considered to be a superior location.
- 6.4 The office market has historically been driven by the public sector and by local professional occupiers, with most of the accommodation provided in converted town houses and the upper floors of retail premises at rents of up to £10psf. The **Bridge Mills Business Centre** on Stramongate provides office accommodation in a two storey mill which was converted three years ago. Demand for the relatively small suites has been healthy and the property is now home to occupiers including Cumbria County Council, The Home Office Identity and Passport Service, Temple Heelis Solicitors and Handelsbanken. Suites of around 1,500sq.ft are currently available at £11psf and we understand there is potential to make a further 8,000sq.ft available.
- 6.5 Kendal's industrial market, meanwhile, remains focused around the northern edge of the town at Shap Road, Dockray Hall and Mintsfeet, where a mixture of industrial and commercial occupiers can be found as well as various trade and quasi-retail operators.
- 6.6 Recent industrial deals in Kendal have, unsurprisingly, involved older accommodation situated to the north of the town. At **Shap Road Industrial Estate**, for example, a unit of around 2,600sq.ft was let earlier this year at £3.57psf whilst other units on the estate were let based on quoting rents of around £5psf. At **Dockray Hall Industrial Estate**, various units of under

4,000sq.ft were let during 2011 based on quoting rents ranging from £1.50psf to £5psf. At **Mintsfeet Industrial Estate**, however, a 4,200sq.ft unit was let in 2010 at £5.34psf, above the quoting rent of £4.50psf.

- 6.7 In recent years, development activity has increasingly been focused in edge of town locations with the development of K Village on Lound Road, Riverside Business Park on Natland Road and Kendal Fell Business Park.
- 6.8 **K Village** at Riverside Place on Lound Road is a redevelopment by Miller Construction of the former K Shoes Outlet Centre, completed around twelve months ago. In addition to a new retail outlet, the development provides 12,500sq.ft of new self-contained office accommodation which has been marketed as two suites of 6,000sq.ft and 6,500sq.ft but which could be sub-divided into smaller suites of 1,200sq.ft upwards. Demand for the scheme has, however, been very limited and all of the accommodation remains available at a quoting rent of £14psf for a 5 year lease. There is also potential for a further 12,500sq.ft of office space in Phase 2. The scheme is thought to have suffered in particular from a lack of public sector requirements, a poorly established office location and a tight car parking ratio in addition to generally poor market conditions and an unwillingness of potential occupiers to commit.
- 6.9 **Riverside Business Park** is a mixed industrial and office development on the site of the former K Shoes Factory on Natland Road to the south of Kendal. The scheme comprises 10 units ranging from 1,000sq.ft to 10,700sq.ft and has attracted occupiers from a wide range of sectors. A flurry of initial lettings in January 2009 was based on quoting rents of £8.28psf for units of around 4,350sq.ft and £10.84psf for smaller units of around 2,200sq.ft. Current availability includes units of around 1,500sq.ft, 8,500sq.ft and 10,000sq.ft. There is further development land available at the site for a second phase of development.
- 6.10 **Kendal Fell Business Park** is a new development scheme anchored by home grown food and drink company Plumgarths. It offers industrial accommodation in units ranging from 2,500sq.ft to 10,000sq.ft available at £6.50psf and benefits from access to the A591 via a private toll road.
- 6.11 Unlike the rest of South Lakeland, Kendal has benefited from regular albeit limited demand for office space according to local agents. This demand has tended to be at the smaller end of the scale (units of around 1,000sq.ft to 3,000sq.ft) and has generally been for freehold accommodation. Whilst Bridge Mills, for example, is now largely let, further office development in the area is not forthcoming as a result of limited values (anything over £125psf to £140psf would be too much for potential purchasers) and a lack of funding.

- 6.12 Agents report demand for industrial accommodation in Kendal to be slightly more buoyant than for offices, although still very limited. They also report a lack of available stock across South Lakeland and little new stock. In general, agents report rents of around £6psf for modern stock and £4.50psf for older stock. There is thought to be some limited pent up demand for industrial accommodation across South Lakeland and there are understood to be one or two enquiries around for warehouses of around 10,000sq.ft to 20,000sq.ft, but a lack of available premises and difficulties in securing funding for new development are constraining the market. Agents differ in their views as to the quantity of development land available.

Ulverston

- 6.13 Ulverston is situated on the main A590 trunk road to Barrow-in-Furness and is home to several major companies with an advanced technological base.
- 6.14 Forge Europa, manufacturer of optoelectronic components and LED lighting, is about to be launch its new £1 million building in Ulverston. The four storey expansion has been built at the back of existing premises and is expected to bring a gradual expansion of the business and, ultimately, more jobs. Other companies making up Ulverston's LED cluster include Marl International, McGeoch, Chromatechnic and Oxley Developments.
- 6.15 Meanwhile, GSK is undertaking a major feasibility study looking at its sites in Ulverston, Barnard Castle, Montrose and Irvine to identify which should be selected for a new £300 million biopharmaceutical plant. The initial impact assessment phase is set to continue into 2012 and the plant would not be built for at least another six years. However, such a plant would mean new jobs for Ulverston, where GSK's workforce has declined from 2,000 to 200 over recent years. Without this new investment, the potential closure of GSK in Ulverston remains a threat to the town.
- 6.16 Ulverston's main industrial area is **North Lonsdale Road Industrial Estate** and **Low Mill Business Park**. North Lonsdale Road Industrial Estate provides units of various sizes for light industrial and even retail uses and a 2 acre development opportunity is currently on the market with Peill & Co. Proposals put forward in 2009 on 6.89 acres of land owned by South Lakeland District Council and 2.15 acres of adjacent land owned by Waite Ltd at North Lonsdale Road to create more workspace for local businesses attracted opposition from local residents due to concerns re. flooding (there has been a recent history of flooding in the Steel Street area). Cross Lane Industrial Estate is a new development of five units ranging from 930sq.ft to 1,920sq.ft. In 2009, subsea electronics connectors manufacturer Expro invested £12 million in a move from premises in Sandside Road to its current home in two modern buildings at Low Mill Business Park.

- 6.17 Ulverston's office market is much more limited. The **Daltongate Business Centre**, owned by Northern Trust, is a modern office complex providing 9 self-contained office suites on ground and first floor ranging from 483sq.ft to 3,789sq.ft. A unit of around 1,000sq.ft is currently available at £10psf on a 3 year tenancy. The **Ulverston Business Centre** on New Market Street provides suites ranging from 125sq.ft to 2,000sq.ft available at £1.38psf on a weekly basis. At **Coniston House** on New Market Street, 4,000sq.ft is currently available at a quoting rent of £10psf. These vacancies have, according to local agents, been around for a long time with very little occupier interest. Office rents in Ulverston are reported to be between £7psf and £10psf.

Milnthorpe

- 6.18 Milnthorpe is a large village located reasonably close to Junction 36 of the M6, but its connectivity with the region's main highway route means that the town appeals to a wider range of occupiers than might otherwise be expected and there has been some recent development at Crooklands, close to Junction 36.
- 6.19 Work is currently underway on the new **Agri-Quarter** at Crooklands, due for completion in Spring 2012. This is a relocation of Kendal's livestock auction market and business to a 13 acre site adjacent to Junction 36 and will include a 76,000sq.ft market and 17,700sq.ft ancillary business units. Initially, the business space will comprise 2,246sq.ft of office space located within the Mart building, available for agriculture-related uses on 3 year leases from £8.50psf. There are, however, also proposals to develop a number of separate commercial units ranging from 1,000sq.ft to 10,000sq.ft on the site, also targeted at agricultural service providers.
- 6.20 **Moss End Business Village** is also located at Crooklands, close to Junction 36. It comprises a mix of modern industrial units and offices in farm buildings that were converted 3 or 4 years ago. The scheme provides 10 office units within a 2 storey converted barn, several of which were let in 2010 based on quoting rents of £15psf to £16psf leaving just one suite of around 3,000sq.ft currently remaining. The scheme also provides a small number of industrial units ranging from 1,216sq.ft up to 6,835sq.ft. although these tend to be used for various purposes including a veterinary practice. Industrial units ranging from 1,145sq.ft to 4,650sq.ft were let in 2010 at around £6psf. Current availability includes a 1,145sq.ft unit available at £7.20psf and a 3,745sq.ft unit available at £6psf.
- 6.21 The **Mainline Industrial Estate**, situated 1 mile from Milnthorpe, provides more dated employment premises. Current availability here is reported to include units ranging from around 2,500sq.ft up to 20,000sq.ft at rents from around £2.80psf up to £5psf. There are also proposals for new industrial units on the site including design and build opportunities.

- 6.22 **Parkhouse Coachworks** is a business located in a modern unit in Milnthorpe, adjacent to this business there are some dated industrial units where current availability includes units of around 7,000sq.ft available at just £3psf. There are proposals to develop a further 34,000sq.ft industrial space in 10 units and 16,000sq.ft retail space in 3 units as an extension to the site, to be known as Parkhouse Lakeland Business Park, the estate roads have been constructed.
- 6.23 To the east of Milnthorpe, **Shoreline House** at Sandside is a modern, purpose built two storey building providing workshop/storage space at ground floor with speculative offices above. A 1,170sq.ft office suite here is currently being marketed at £17psf.
- 6.24 Other employment space in the area includes converted agricultural buildings such as **Levens Hall**, where a former stable block was converted to 5 small offices totalling 7,000sq.ft, and the **Dallam Tower Estate**, where office and storage space has been created from converted buildings.

Grange-over-Sands

- 6.25 Grange-over-Sands is a key service centre within the southern part of South Lakeland. Employment sites are few and are dispersed throughout the town and there have been no recorded industrial deals over recent years. The main employment area is **Station Yard** which provides a range of small hybrid workshop units and includes occupiers such as caterers, car workshops and sign writers.
- 6.26 The office market in Grange is also very limited, although there have been two deals reported during 2011. 250sq.ft of office space at Victoria Hall on Main Street was let based on a quoting rent of £8.79psf whilst 1,400sq.ft at Natwest Bank Chambers on Main Street was let based on a quoting rent of £5.22psf.

Kirkby Lonsdale

- 6.27 Kirkby Lonsdale is a key service centre located to the east of the District on the A65 which runs from Junction 36 of the M6 across to Yorkshire. Kirkby Lonsdale Business Park is the town's main employment area. It comprises nine industrial units which were developed in 2007 and are home to local businesses.

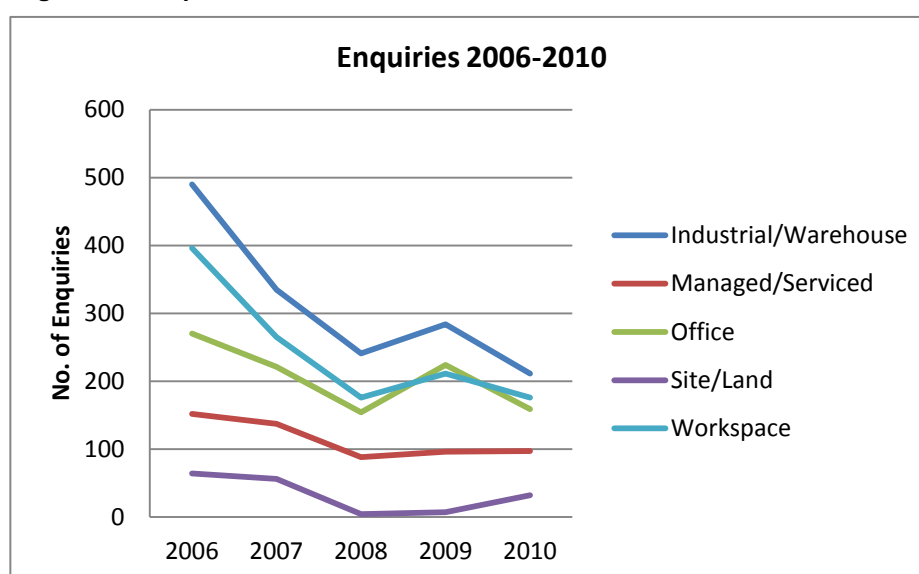
Enquiries for Employment Land and Premises

- 6.28 South Lakeland District Council records enquiries received for employment land and premises, providing an indication of the scale and nature of demand in South Lakeland over recent years. This enquiries information includes areas of the authority within the National Park and it is not possible to split the data to exclude these areas. The information therefore

needs to be considered in this context although we do not expect it to create a major difference to the statistics.

- 6.29 Figure 6.1 shows the number of enquiries received, by use type, for the five year period to 2010. It shows a significant decline in the number of enquiries received between 2006 and 2008, with enquiries then picking up slightly in 2009. It was enquiries for industrial/warehouse premises, workspace premises and office premises that saw the greatest drop over the period but also the greatest recovery, although enquiries in these land use types have shown a further decline in 2010.

Figure 6.1: Enquiries 2006-2010



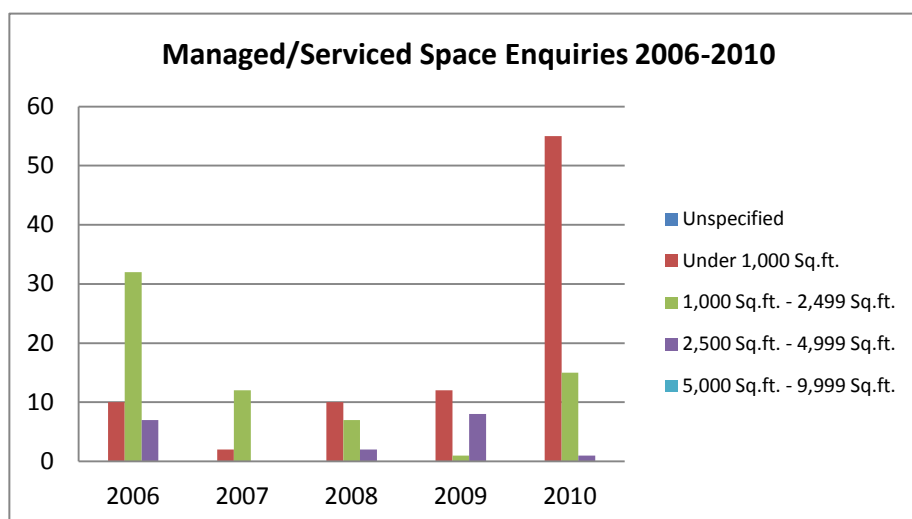
Source: South Lakeland District Council

- 6.30 Figures 6.1 to 6.6 below show in more detail enquiry levels, by size band, for the five year period to 2010. It should be noted that we have excluded the size band '10,000sq.ft and above' as this category included any enquiries that did not specify a size which skewed the data.
- 6.31 Figure 6.2 shows the trends in industrial/warehouse enquiries. It shows that enquiries for smaller premises under 1,000sq.ft have steadily increased since 2007, peaking in 2010. Enquiries for units of 1,000sq.ft to 2,499sq.ft were at their highest in 2006 before dropping back in 2007 and again in 2010. Enquiries for units of 2,500sq.ft to 4,999sq.ft and 5,000sq.ft to 9,999sq.ft have remained relatively low throughout the period,

Figure 6.2: Industrial/Warehouse Enquiries 2006-2010

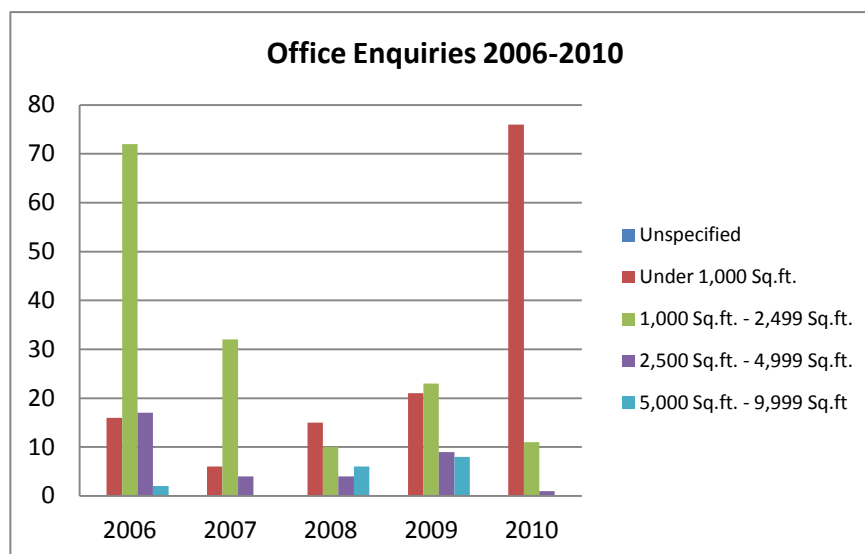
Source: South Lakeland District Council

- 6.32 Figure 6.3 shows the trend in enquiries for managed/serviced space. Once again, enquiries for small scale space of under 1,000sq.ft jumped considerably in 2010. Enquiries for 1,000sq.ft to 2,499sq.ft were also relatively healthy, although nowhere near their 2006 levels. There have been few enquiries for larger units of 2,500sq.ft to 4,999sq.ft and none recorded for 5,000sq.ft to 9,999sq.ft, reflecting the nature of this particular type of premises.

Figure 6.3: Managed/Serviced Space Enquiries 2006-2010

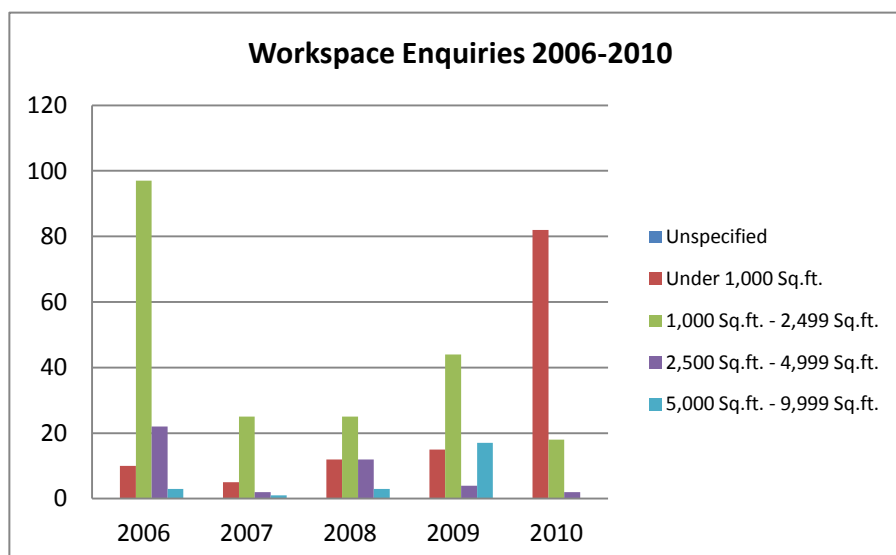
Source: South Lakeland District Council

- 6.33 Figure 6.4 shows the number of office enquiries over the five year period. Once again, it shows that enquiries in 2010 were dominated by requirements for under 1,000sq.ft, in contrast to the dominance of enquiries for 1,000sq.ft to 2,499sq.ft in 2006. Unsurprisingly, enquiries for 2,500sq.ft to 4,999sq.ft and 5,000sq.ft to 9,999sq.ft have been much more limited and 2010, in particular, saw a shift towards smaller requirements.

Figure 6.4: Office Enquiries 2006-2010

Source: South Lakeland District Council

- 6.34 Figure 6.5 shows enquiries for workspace. As with the other property types, enquiries in 2010 were dominated by the under 1,000sq.ft size band compared to a dominance of the 1,000sq.ft to 2,499sq.ft size band in 2006. 2009 saw an unusually large number of enquiries for larger premises of 5,000sq.ft to 9,999sq.ft.

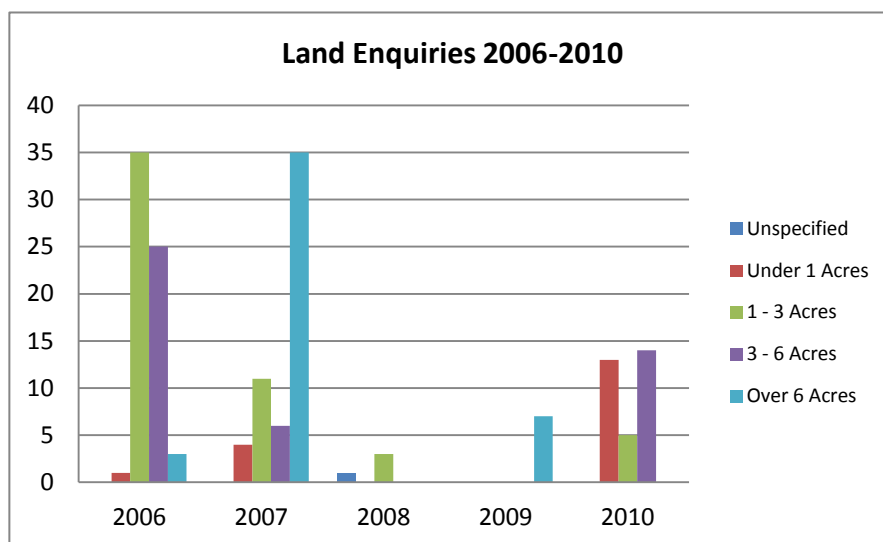
Figure 6.5: Workspace Enquiries 2006-2010

Source: South Lakeland District Council

- 6.35 Figure 6.6 shows that enquiries for land have fluctuated significantly over the five year period. 2006 was dominated by enquiries for land between 1 and 3 acres and between 3 and 6 acres. In contrast, 2007 was dominated by larger scale enquiries for land over 6 acres. There have

been fewer enquiries overall since 2008 although 2010 was a more buoyant year in terms of enquiries.

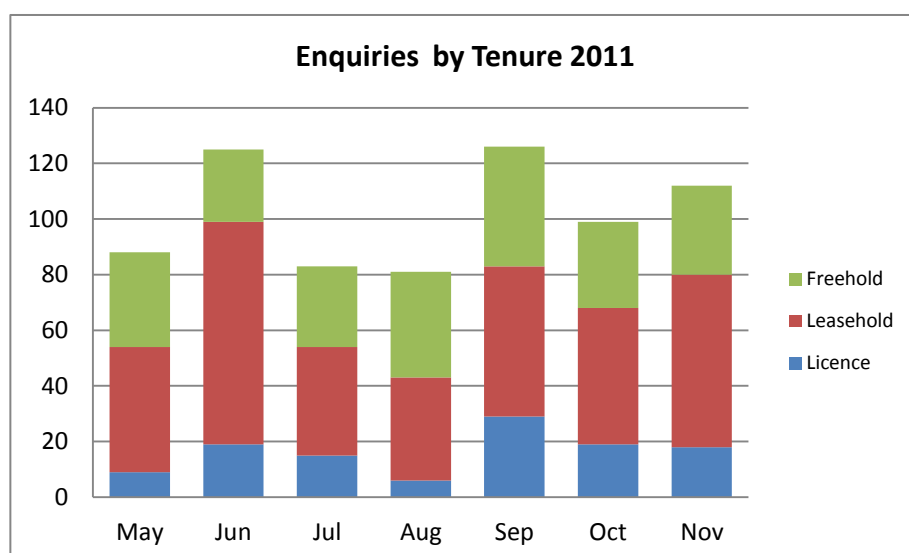
Figure 6.6: Land Enquiries 2006-2010



Source: South Lakeland District Council

6.36 Figure 6.7 looks in more detail at enquiries, by tenure, from May to November 2011. It shows that whilst the overall number of enquiries has fluctuated throughout the year, enquiries for freehold premises have remained fairly constant.

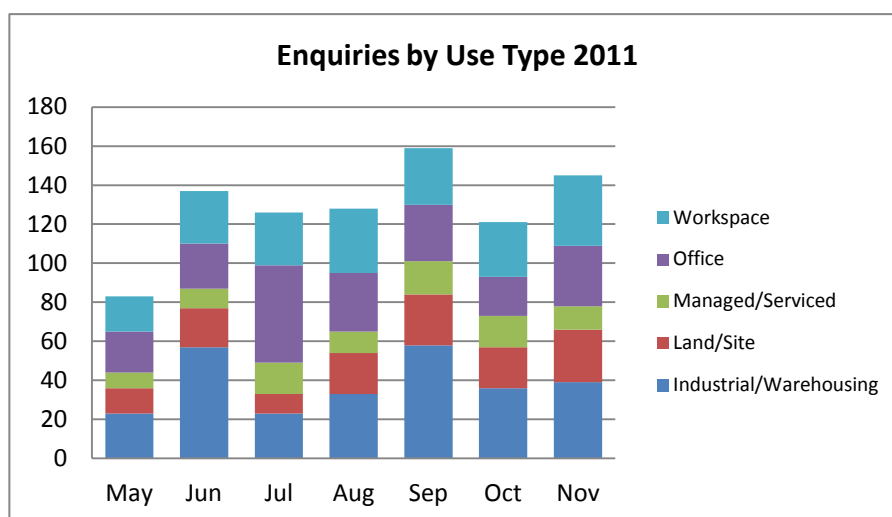
Figure 6.7: Enquiries by Tenure 2011



Source: South Lakeland District Council

- 6.37 Figure 6.8 takes a more detailed look at enquiries by use type from May to November 2011. It shows that the majority of enquiries received over the year have been for industrial/warehousing premises followed by offices, workspace and sites. There are relatively few enquiries for managed/service space.

Figure 6.8: Enquiries by Use Type 2011



Source: South Lakeland District Council

- 6.38 The key messages from this assessment support the views in the Eden and South Lakeland Forward business survey undertaken in 2010. It shows that the majority of demand is for smaller units of under 5000sq.ft with the smallest bracket of under 1000sq.ft having the highest demand.

Employment Land Availability

- 6.39 Table 6.2 summarises the availability of employment land by market sector as at March 2011, according to Cumbria County Council's Employment Land Availability Schedules.

Table 6.2: Employment Land Availability by Market Sector

| Market Sector | Completed Land | Land Available | | | Total Available (ha) |
|----------------------|-------------------------------|-------------------------|-------------------------------|----------------|----------------------|
| | Completed Land 2006-2011 (ha) | Under Construction (ha) | With Planning Permission (ha) | Allocated (ha) | |
| Business Park | 0.00 | 0.00 | 2.20 | 0.00 | 2.20 |
| Local Employment | 7.69 | 1.35 | 1.54 | 8.25 | 11.15 |
| Own Use | 1.33 | 1.29 | 0.05 | 0.00 | 1.34 |
| Strategic Employment | 0.00 | 0.00 | 1.55 | 2.95 | 4.50 |
| Total | 9.02 | 2.64 | 5.34 | 11.20 | 19.19 |

Source: Cumbria County Council Land Availability Schedules

- 6.40 The total land available exceeds the total land in Table 5.1 because the total in Table 6.2 includes sites of less than 0.25 hectares, sites under construction and sites identified for own use.
- 6.41 Only 2.20ha of Business Park land is now available – this is at Shenstone House to the south Kendal and has the benefit of planning permission. The only available Strategic Employment land is at Station Yard in Milnthorpe, amounting to 4.50ha. There is 11.15ha of Local Employment land available, the majority of which is found in small sites of under 1ha dispersed across the District. Finally, there is just 1.34ha Own Use land now available, most of which is found in small sites of under 1ha. The sites listed as own use are retained for specific end users and are not readily available to others.
- 6.42 Table 6.3 shows employment land availability by land type as at 12 months ending 31st March 2011.

Table 6.3: Employment Land Availability by Land Type

| Market Sector | Completed Land | Land Available | | | Total Available (ha) |
|---------------|-------------------------------|-------------------------|-------------------------------|----------------|----------------------|
| | Completed Land 2006-2011 (ha) | Under Construction (ha) | With Planning Permission (ha) | Allocated (ha) | |
| B1a | 0.20 | 0.00 | 0.54 | 0.00 | 0.54 |
| B1c | 0.37 | 0.31 | 0.31 | 0.00 | 0.62 |
| B2 | 0.02 | 0.00 | 0.05 | 0.00 | 0.05 |
| B8 | 0.02 | 0.00 | 0.00 | 0.00 | 0.00 |
| Mixed | 8.39 | 2.33 | 4.45 | 11.20 | 17.98 |
| Total | 9.00 | 2.64 | 5.35 | 11.20 | 19.19 |

Source: Cumbria County Council Land Availability Schedules

Key Messages from the Property Market Review

- Kendal is the main economic centre for South Lakeland and is therefore the focus of property market activity. Activity has traditionally focused around the northern edge of the town, but the southern approach to the town is now considered a superior location from a property market view point.
- Office accommodation has historically been provided in older town centre premises at rents of up to £10psf. Demand has been relatively strong for small suites in converted mill premises available at £11psf but new and slightly larger scale out of town space available at £14psf remains vacant

- Kendal's industrial market remains focused to the north of the town and is generally dated, with older units attracting around £4.50psf and more modern units attracting £6psf. Agents report some limited pent up demand for industrial space across Kendal and South Lakeland but a shortage of available premises and a lack of new development
- Ulverston is home to several major companies with an advanced technological base and there has been some significant investment here over recent years. Other industrial provision is dated, however, and rents remain low. Some small scale office space is available in the town at rents of £7psf to £10psf, but there is very little occupier demand
- While employment floorspace in Milnthorpe itself is generally dated, there has been recent development at Crooklands close to Junction 36 of the M6. Small scale office space available at £15psf has been successfully let as have new industrial units of up to 5,000sq.ft available at £6psf.
- The property market in the settlements of Grange-over-Sands and Kirkby Lonsdale is limited to small scale workshop units and small scale town centre office space
- Analysis of enquiries for employment land and premises has shown a significant decline in the number of enquiries received over the five years to 2010, albeit picking up slightly in 2009
- Across all property types, the majority of enquiries have been for smaller premises of under 1,000sq.ft, with the number of smaller enquiries increasing significantly in 2010. Unsurprisingly, there were very few enquiries for land during 2008 and 2009 with some renewed interest in 2010. This is supported by the findings of the 2010 business survey.

7 Employment Sector Forecasts

Future Growth Prospects – Quantitative Employment Land Projections

- 7.1 From the review of economic strategy documents (as set out in chapter 2) it is clear that the following key themes or opportunities are viewed as key drivers of future job and wealth creation for South Lakeland over both the short and longer term:
- Opportunities in energy and the low carbon economy (and other areas of specialist manufacturing);
 - The continued growth of the tourism sector; and
 - Supporting the role of these two Principal Service Centres (Kendal and Ulveston).
- 7.2 These factors will be taken into account when developing a number of economic forecasting scenarios for the district (LDF) area to feed into the employment land projections.
- 7.3 This section draws on an analysis of recent economic trends and established forecasts to develop a series of scenarios for the short, medium and long term demand for employment premises in the study area to 2025. A series of evidence based assumptions underpin an assessment of demand for B1, B2 and B8 premises for South Lakeland, outside of the National Parks area.
- 7.4 There are a number of key principles which have underpinned these assumptions. In summary, these include:
- The area's increasing population, and subsequent increasing demand for more jobs particularly in service and knowledge based sectors;
 - The focus on a number of key priority sectors, including higher value manufacturing and the low carbon economy;
 - Regeneration priorities which are focused on the continued development of the Principal Service Centres of Kendal and Ulverston.

Scenarios

- 7.5 A number of different scenarios are provided as follows:

- 7.6 Scenario 1 - This is based on applying the latest Cumbria economic forecasts by sector (Experian's January 2011 forecasts) to South Lakeland's employment breakdown as per the 2010 Business Register and Employment Survey¹¹.
- 7.7 Scenario 2 - This is based on applying the latest Cumbria economic forecasts by sector (Experian's January 2011 forecasts) to South Lakeland's employment breakdown as per the 2010 Business Register and Employment Survey. An allowance has been made for the accelerated growth anticipated in South Lakeland compared to Cumbria based on the January 2011 economic forecasts. This additional growth is spread across the growth sector in South Lakeland's economy, which are: Other manufacturing, retailing, wholesaling, hotels and catering, other F&Bs, health and other (note, some of these sectors will not be relevant for the Employment Land Review).
- 7.8 Scenario 3 - This is based on scenario 2, but with an additional 50% growth spread across the growth sectors.
- 7.9 Scenario 4 - This scenario is a trend based scenario based on employment trends by sector in the South Lakeland economy over the period 2000-2010. The average growth / decline per year over this period is applied to cover the period of the employment land review.

Methodology Explanation

- 7.10 In order to develop the employment land requirements under each of the scenarios, the following process was undertaken:
1. A series of four economic forecasts were developed for the South Lakeland economy by sector (see below for explanation).
 2. Each of the sectors used in the economic forecasts was converted into either B1, B2 or B8 uses.
 3. Average employment densities (using the employment Densities Guide¹²) were applied to the economic forecasts. The densities used were as follows:
 - B1 = 12 sq m per fte job
 - B2 = 36 sq m per fte job
 - B8 = 70 sq m per fte job
 4. The following average plot ratios were used to convert employment space into employment land:
 - B1 = 50%

¹¹ Business Register and Employment Survey 2010. Source: the Office for National Statistics (accessed via nomisweb – www.nomisweb.co.uk)

¹² Employment Densities Guide, 2nd Edition 2010, Drivers Jonas Deloitte for the HCA and OFFPAT

- B2 = 40%
 - B8 = 40%
5. Vacancy rates of 10% were applied to each of the use classes
6. The following assumptions have been made regarding the proportion of South Lakeland's employment which is located within the LDF area across the different use classes
- B1 = 80%
 - B2 = 90%
 - B8 = 90%
- 7.11 The following tables provide the employment land requirements for the South Lakeland LDF area based on these economic scenarios and assumptions. Where the figures in the tables do not add up this is down to rounding. The average requirement equates to 3ha land over the 15 year period (an average of 0.2ha per annum). This is mainly accounted for by the forecast increase in B1 and B8 employment. The highest annual requirement under each of the three use classes equates to 13.2 hectares over the 15 year period (an average of 0.9ha per annum). A significant proportion of this is accounted for by the large growth of the B1 use class under the recent trends scenario.

| Scenario 1 for the South Lakeland LDF Area – Latest Cumbria Economic Forecasts by Sector | | | | | | |
|--|------------------------|------------------|------------------|------------------|------------------|----------------------|
| Type of Land | Employment Land (sq m) | | | | | Employment Land (ha) |
| | 2010 | 2015 | 2020 | 2025 | Change 2010-2025 | Change 2010-2025 |
| B1 (Office) | 124,249 | 122,011 | 124,918 | 128,640 | 4,391 | 0.44 |
| B2 (Industrial) | 605,906 | 624,556 | 625,238 | 606,646 | 740 | 0.07 |
| B8 (Warehouse) | 442,477 | 450,488 | 457,441 | 462,025 | 19,548 | 1.95 |
| TOTAL | 1,172,632 | 1,197,055 | 1,207,598 | 1,197,311 | 24,679 | 2.47 |

| Scenario 2 for the South Lakeland LDF Area – Latest Cumbria Economic Forecasts by Sector with South Lakeland Uplift | | | | | | |
|---|------------------------|------------------|------------------|------------------|------------------|----------------------|
| Type of Land | Employment Land (sq m) | | | | | Employment Land (ha) |
| | 2010 | 2015 | 2020 | 2025 | Change 2010-2025 | Change 2010-2025 |
| B1 (Office) | 124,249 | 122,687 | 126,890 | 130,974 | 6,725 | 0.67 |
| B2 (Industrial) | 605,906 | 627,404 | 633,542 | 616,481 | 10,575 | 1.06 |
| B8 (Warehouse) | 442,477 | 454,322 | 468,620 | 475,263 | 32,786 | 3.28 |
| TOTAL | 1,172,632 | 1,204,413 | 1,229,052 | 1,222,718 | 50,086 | 5.01 |

| Scenario 3 for the South Lakeland LDF Area – Accelerated Growth Scenario | | | | | | |
|--|------------------------|------------------|------------------|------------------|------------------|----------------------|
| Type of Land | Employment Land (sq m) | | | | | Employment Land (ha) |
| | 2010 | 2015 | 2020 | 2025 | Change 2010-2025 | Change 2010-2025 |
| B1 (Office) | 124,249 | 122,345 | 127,148 | 132,053 | 7,804 | 0.8 |
| B2 (Industrial) | 605,906 | 625,960 | 634,632 | 621,031 | 15,125 | 1.5 |
| B8 (Warehouse) | 442,477 | 452,378 | 470,086 | 481,388 | 38,911 | 3.9 |
| TOTAL | 1,172,632 | 1,200,683 | 1,231,867 | 1,234,471 | 61,839 | 6.2 |

| Scenario 4 for the South Lakeland LDF Area – Trends Based Growth for South Lakeland | | | | | | |
|---|------------------------|------------------|------------------|------------------|------------------|----------------------|
| Type of Land | Employment Land (sq m) | | | | | Employment Land (ha) |
| | 2010 | 2010 | 2015 | 2025 | Change 2010-2025 | Change 2010-2025 |
| B1 (Office) | 124,249 | 146,059 | 171,698 | 201,837 | 77,588 | 7.8 |
| B2 (Industrial) | 605,906 | 592,515 | 579,420 | 566,615 | -39,291 | -3.9 |
| B8 (Warehouse) | 442,477 | 423,401 | 405,149 | 387,682 | -54,795 | -5.5 |
| TOTAL | 1,172,632 | 1,161,976 | 1,156,266 | 1,156,134 | -16,498 | -1.6 |

| Average Employment Land Requirements for the South Lakeland LDF Area 2010-2025 | | | | | | |
|--|---------------------------------------|-------------|------------|-------------|------------|-------------|
| Type of Land | Employment Land Change 2010-2025 (ha) | | | | | |
| | Scenario 1 | Scenario 2 | Scenario 3 | Scenario 4 | Average | Highest |
| B1 (Office) | 0.44 | 0.67 | 0.8 | 7.8 | 2.4 | 7.8 |
| B2 (Industrial) | 0.07 | 1.06 | 1.5 | -3.9 | -0.3 | 1.5 |
| B8 (Warehouse and Distribution) | 1.95 | 3.28 | 3.9 | -5.5 | 0.9 | 3.9 |
| TOTAL | 2.47 | 5.01 | 6.2 | -1.6 | 3.0 | 13.2 |

- 7.12 Based purely on a variety of economic forecasts therefore, the employment land requirements under each of the use classes is likely to be low. The forecasts however are higher than the net employment land projections based on a quantitative assessment which were set out within the previous Arup study¹³ (which forecast an overall decrease) as demonstrated below. As with the tables above, where the figures do not add up this is down to rounding.

Comparison of 2005 and 2012 Net Employment Land Projections
(based on a quantitative assessment of economic forecasts and past trends)

¹³ South Lakeland District Council (2005): Employment Land and Premises Study Final Report

| Use Class | 2005 ELR Study | | 2012 ELR Study | |
|--------------|---------------------|---------------------|---------------------|---------------------|
| | Average yearly (ha) | Highest yearly (ha) | Average yearly (ha) | Highest yearly (ha) |
| B1 Uses | -0.20 | +0.05 | 0.16 | 0.52 |
| B2 Uses | -0.79 | -0.56 | -0.02 | 0.10 |
| B8 Uses | +0.19 | +0.40 | 0.06 | 0.26 |
| Total | -0.80 | -0.11 | +0.20 | +0.88 |

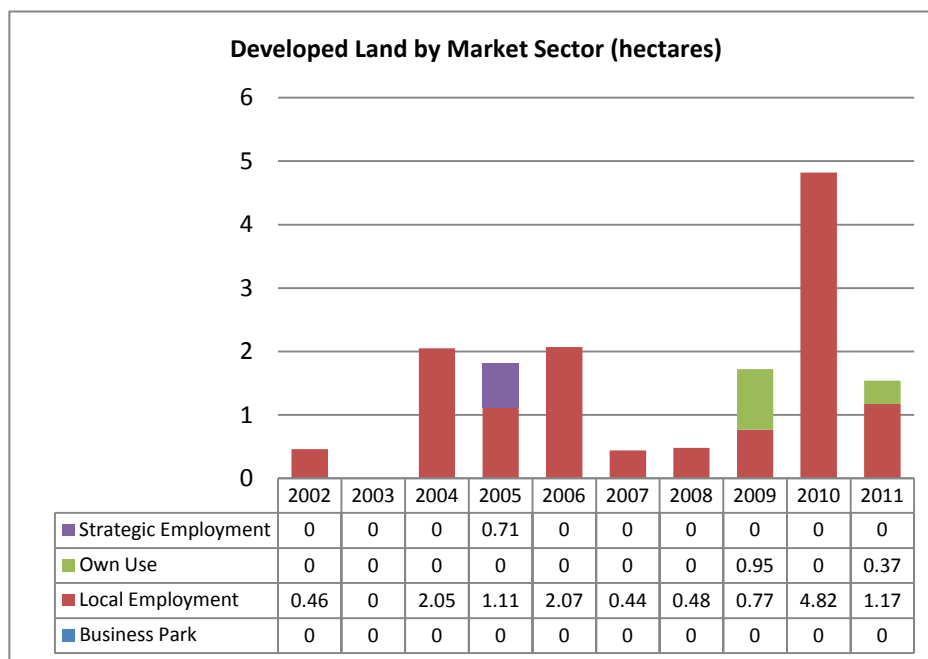
- 7.13 A level of caution however should be applied to these forecasts for a number of reasons. Firstly, the ability to accurately forecast economic change over a 15 year period is notoriously difficult, further complicated by the complex and challenging economic climate which faces the UK and global economies. Secondly, the economic forecasts used are based on Experian's analysis of 2010 which not only is over a year out of date, but does not take into account local variations. A much more detailed economic forecasting model is being developed in conjunction with South Lakeland District Council and Cumbria County Council for completion in early 2012 which will take into account local economic conditions and regeneration priorities to a far greater extent. It is recommended that the forecasts set out in this section be re-worked once these revised forecasts have been published. Finally, these quantitative requirements do not take into account historical take up, property demand, regeneration priorities and the need to provide a level of new build to meet the needs of expanding local companies and attract new businesses.

Historic Employment Land Take-Up

- 7.14 Over the five years from 1st April 2001 to 31st March 2006, a total of 6.40ha of employment land has been taken up, according to Cumbria County Council's Employment Land and Floorspace Availability Schedules. This equates to just 1.28ha per annum over the five year period. The vast majority of this (5.69ha) was on Local Employment sites, with just 0.71ha on Strategic Employment sites and none on Business Park sites (development for Own Use was not recorded as a separate category during this period).
- 7.15 Over the most recent five years from 1st April 2006 to 31st March 2011, a total of 9ha of employment land has been taken up, according to the Employment Land and Floorspace Availability Schedules. This equates to a slightly higher average of 1.8ha per annum over the five year period. Again, the majority of this (7.68ha) was on Local Employment sites, with a further 1.32ha developed for Own Use (sites developed specifically for the use of the owner). No development took place on Strategic Employment or Business Park land during this period.
- 7.16 Over the 10 years for which employment land take-up figures are available, this gives an average take-up of **1.54ha per annum**.

- 7.17 Figure 7.1 illustrates how employment land take-up has fluctuated over the ten year period, by market sector. Most strikingly, it shows that development peaked in 2010, accounted for by Low Mill Tannery in Ulverston (phase 2 of Low Mill Business Park was completed in 2010 with the development of Expro Connectors new premises). It also shows that the majority of development has taken place on Local Employment Sites, such as Low Mill Business Park.

Figure 7.1: Land Developed by Market Sector 2007-2011



Source: Cumbria County Council Employment Land Availability Schedules

- 7.18 Table 6.1 takes a more detailed look at completed floorspace by service centre over the 12 months from 1st April 2010 to 31st March 2011. It shows that the only significant completions during the year were in Kendal and Ulverston.

Table 6.1: Completed Floorspace by Service Centre¹⁴

| Gross Floorspace Completed (sq.m) April 2010 to March 2011 | | | | | | |
|--|-------------|------------|-------------|------------|------------|-------------|
| Service Centre | B1a | B1b | B1c | B2 | B8 | Total |
| Arnsdale | 0 | 0 | 0 | 0 | 0 | 0 |
| Cartmel | 0 | 0 | 0 | 0 | 0 | 0 |
| Grange | 0 | 0 | 0 | 0 | 0 | 0 |
| Kendal | 1055 | 533 | 823 | 161 | 241 | 2813 |
| Kirkby Lonsdale | 0 | 0 | 0 | 0 | 0 | 0 |
| Milnthorpe | 61 | 0 | 0 | 0 | 0 | 61 |
| Rural | 100 | 0 | 29 | 0 | 0 | 129 |
| Ulverston | 0 | 0 | 1340 | 0 | 0 | 1340 |
| Total | 1216 | 533 | 2192 | 161 | 241 | 4343 |

Source: Cumbria County Council Land Availability Schedules

¹⁴ Principal Service Centre – Kendal and Ulverston, Key Service Centre – Kirkby Lonsdale, Grange over Sands and Milnthorpe, Local Service Centre – Arnsdale and Cartmel.

In Kendal, completions included 8,640sq.ft (803sq.m) at Dockray Hall Mill, 2,290sq.ft (292sq.m) at Shap Industrial Estate, 8,030sq.ft (746sq.m) at Meadowbank on Shap Road and 6,430sq.ft (597sq.m) at Mintsfeet Road. In Ulverston, completions included 11,625sq.ft (1,080sq.m) at the former St. Jude's Church and 2,800sq.ft (260sq.m) at the Red Syke Depot in Pennington.

8 Creating a Picture of Future Requirements

Introduction

- 8.1 This section of the report brings together our analysis of historic trends in employment land take-up, workspace and land enquiries and employment forecasts to create a picture of future requirements. It attempts to present a picture of future requirements by location and employment sector. However, given the significant local environmental constraints upon development and the level of past and projected future take-up of employment sites, a pragmatic approach to selecting and allocating employment sites is advocated.

Employment Forecasts

- 8.2 Four scenarios were presented in Section 7 of this report. The four scenarios projected the following employment land change for 2010 – 2025.

Table 8.1: Employment Land Requirements 2010-2025

| Type of Land | Employment Land Change 2010-2025 (ha) | | | | | |
|-------------------------------|---------------------------------------|-------------|------------|-------------|------------|-------------|
| | Scenario 1 | Scenario 2 | Scenario 3 | Scenario 4 | Average | Highest |
| B1 (Office) | 0.44 | 0.67 | 0.8 | 7.8 | 2.4 | 7.8 |
| B2 (Industrial) | 0.07 | 1.06 | 1.5 | -3.9 | -0.3 | 1.5 |
| B8 (Warehouse & Distribution) | 1.95 | 3.28 | 3.9 | -5.5 | 0.9 | 3.9 |
| TOTAL | 2.46 | 5.01 | 6.2 | -1.6 | 3.0 | 13.2 |

- 8.3 Scenario 3 has been agreed by the steering group as the favoured growth scenario. It suggests a total requirement of 6.2 hectares, comprising 0.8 hectares or 13% B1, 1.5 hectares or 24% B2 and 3.9 hectares or 63% B8.

Historic Take-up

- 8.4 Section 7 of this report includes analysis of historic take-up. This concluded that:
- Over the 10 years for which employment land take-up figures are available (1st April 2001 – 31st March 2011), average take-up was 1.54ha per annum.
 - Over the five years from 1st April 2006 – 31st March 2011, the average annual take up is slightly higher at 1.8ha per annum.
 - Over the past five years the developed land by market sector statistics suggest that 85% of take-up has been of local employment sites. The remaining 15% has been own use sites. No take-up has occurred on strategic employment or business park sites.

- 8.5 Historic take-up in South Lakeland LDF area has consistently been above employment forecast based land requirements. This is not a surprise as these employment forecast based figures do not account for companies planning for potential future expansion or moving from dated premises into modern accommodation.

Workspace and Land Enquiries

- 8.6 Section 6 of this report analyses enquiries for employment premises and land. This analysis concluded:
- A significant decline in the number of enquiries received over the five years to 2010, albeit picking up slightly in 2009.
 - Across all property types, the majority of enquiries have been for smaller premises of under 1000sq.ft, with the number of smaller enquiries increasing significantly in 2010.

Business Survey

- 8.7 A business survey has not formed part of this study. However, a business survey for the LDF area was conducted as part of the 2005 Employment Land and Premises Study. A further business survey was commissioned by Eden and South Lakeland Forward and undertaken in April and May 2010. This more recent study relates to both Eden and South Lakeland District and includes land within the National Parks. The relevant findings of these two surveys are summarised below.

2005 Business Survey

- 8.8 The 2005 Business survey included questions about the type and location of premises / land required by respondents. Responses relating to use class of business, type of site / premises and location are of particular interest in assessing the picture of future requirements.

Use Class of Business

| Use Class | Percentage of Companies |
|---------------------------------|-------------------------|
| B1 – Offices / Light Industrial | 44% |
| B2 – General Industrial | 23% |
| B8 – Warehousing / Distribution | 20% |
| Other | 13% |

Source: South Lakeland Employment Land and Premises Study 2005

- 8.9 The majority of businesses that replied, some 44%, are office or light industrial users. General industrial and warehousing / distribution businesses comprised 23% and 20% of respondents respectively. These figures broadly correlate with the figures in our economic overview.

Businesses falling within Class B1 remain the predominant business type, followed by B2 and B8.

Type of Site / Premises

| Type | Percentage of Companies |
|---------------------------|-------------------------|
| Strategic Employment Site | 25% |
| Business Parks | 32% |
| Local Employment Sites | 51% |
| Other | 14% |

Source: South Lakeland Employment Land and Premises Study 2005

- 8.10 The authors of the 2005 study explain that this question sought to clarify the type of site and premise the respondents would like to see being provided. 51% stated that more Local Employment Sites of a minimum 1 hectare (2.5 acres) were required.

Location

| Location | Percentage of Companies |
|-------------------|-------------------------|
| Kendal | 58% |
| Ulverston | 13% |
| Grange-over-Sands | 5% |
| Milnthorpe | 13% |
| Kirkby Lonsdale | 3% |
| Other | 18% |

Source: South Lakeland Employment Land and Premises Study 2005

- 8.11 The authors of the 2005 study explain that this question sought to establish where these premises should be provided. 58% of respondents stated Kendal, which is perhaps to be expected, given its position as the dominant location within the district, where the highest proportion of businesses are located. Interestingly, some 18% stated other locations, the majority of these being in the Holme/Carnforth area. The study authors suggest this can possibly be attributed to a strong representation of businesses from this location at the Business Liaison Forum, but also points to the popularity of this location to existing occupiers seeking to expand.

2010 Business Survey

- 8.12 The 2010 business survey was commissioned by Eden and South Lakeland Forward and prepared by CN Research in April and May 2010. A report into the results of the survey was published in June 2010. The aim of the survey was to investigate what business requirements are going to be for land and premises over the next few years.

8.13 Questionnaires were sent to approximately 8000 businesses in the Eden and South Lakeland Districts and 191 responses were received. Caution needs to be given to the findings of this study as the respondents are situated in Eden and parts of South Lakeland outside of the LDF Area (within the National Parks).

8.14 In summary, relevant findings of the survey are:

- 25% of businesses were located in Kendal and 12% in Ulverston.
- 68% (128) of respondents said that their business employs 1-10 people. 17% (31) employ 11-24 people and 9% (17) employ 25-49 people.
- 25% (48) of respondents said that the type of premises that their business occupies is a 'small business at home'. 22% (42) occupy an office, 11% (20) occupy an office with workshop and 8% (16) occupy an office with warehouse.
- Existing floorspace was:
 - Office (B1)
48% (78) of businesses have total floorspace of less than 1,000 sq ft and 20% (32) have a floorspace of 1-5,000 sq ft.
 - Light Industrial (including offices) (B1)
26% (22) of businesses have total floorspace of less than 1,000 sq ft and 19% (16) have a floorspace of 1-5,000 sq ft.
 - General Industrial (B2) including offices
12% (8) of businesses have total floorspace of less than 1,000 sq ft and 10% (7) have a floorspace of 1-5,000 sq ft.
 - Storage or distribution (B8)
20% (15) of businesses have total floorspace of less than 1,000 sq ft and 12% (9) have a floorspace of 1-5,000 sq ft.
- Over the next 12 months 8% businesses intend to expand their existing premises and 15% intends to relocate to new premises (10% to South Lakeland).
- Over the course of 10 years 32% of businesses intend to expand their existing premises and 57% intends to relocate to new premises (36% to South Lakeland).
- Property Expansion and / or relocation requirements was:
 - Offices (B1) - 38% (41) of businesses that anticipate expansion and/or relocation will require total floorspace of less than 1,000 sq ft and 26% (28) will require 1-5,000 sq ft.
 - Light Industrial (B1) - 28% (20) of businesses that anticipate expansion and/or relocation will require total floorspace of 1-5,000 sq ft and 15% (11) will require less than 1,000 sq ft. 38% (27) said that this was not applicable to them.

- General Industrial (B2) - 18% (8) of businesses that anticipate expansion and/or relocation will require total floorspace of 1-5,000 sq ft and 7% (3) will require 5-10,000 sq ft. 67% (30) said that this was not applicable to them.
- Storage & Distribution (B8) - 19% (10) of businesses that anticipate expansion and/or relocation will require total floorspace of less than 1,000 sq ft and 13% (7) require 5-10,000 sq ft. 51% (27) said that this was not applicable to them.
- Preferred locations in South Lakeland were Kendal and Ulverston.

The Quantity of Future Demand

- 8.15 Employment forecast based land requirement projections suggest a total requirement for the plan period (2010 – 2025) of 6.2ha. Recent take-up of employment land averages 1.8ha per annum (2006 – 2011 annual average), whilst more historic take-up of employment land averages 1.54ha per annum (1999-2011 annual average). Annual take-up and employment forecast based projected land requirements, both fall well within the 3.80ha suggested by the Cumbria and Lake District Joint Structure Plan 2001 – 2016, approved April 2006 and the 4.00ha proposed in the 2005 Employment Land and Premises Study.
- 8.16 Given the consistent trend of take-up averaging under 2.00ha for more than the past decade, it seems a little excessive to allocate employment land at a level that is double historic average take-up. Evidence is that average annual take-up is just under 2.00ha. Making an allowance of 20% for choice and competition, this suggests a more appropriate annual target of 2.40ha or 36ha for the plan period 2010-2025.

The Location of Employment Sites

- 8.17 The adopted Core Strategy identifies the development strategy for the district with development concentrated in the principal service centres of Kendal and Ulverston. It provides the following split of development, which has been used to equate with this studies recommended annual average requirement of 2.4 hectares per annum and recommended total LDF area requirement over the 15 year plan period for employment land of 36 hectares:

Table 8.2: Location and Quantum of Employment Land

| Location | Percentage Split | Land (ha) |
|---|------------------|--------------|
| Kendal | Approx 35% | Approx 12.60 |
| Ulverston | Approx 20% | Approx 7.20 |
| Milnthorpe, Kirkby Lonsdale and Grange-over-Sands | Approx 13% | Approx 4.68 |
| Network of Local Service Centres | Approx 21% | Approx 7.56 |
| Network of smaller villages and hamlets | Approx 11% | Approx 3.96 |

- 8.18 The results of the business surveys and analysis of historic take-up broadly support the distribution of development advocated in the core strategy.
- 8.19 In Kendal, in particular, identification of brownfield sites suitable for new employment development is very difficult. There are very few potential sites of this type and those that are available are typically small in size. It is therefore necessary that greenfield sites on the edge of the town must be considered for new development. The 2010 survey identifies 'Kendal – edge of town' as a potential location for new premises and 22% of respondents identified Kendal as their preference for relocation. The Canal Head in Kendal does provide a potential and significant brownfield opportunity, however, availability of the site and the precise nature and mix of development is to be determined through the preparation of an Area Action Plan.
- 8.20 In Ulverston there are opportunities for brownfield development, notably the Ulverston Canal Head. However, to meet the full target for employment (and other development) land in Ulverston, greenfield sites are also likely to be necessary.
- 8.21 Development in the Principal Service Centres of Kendal and Ulverston should still be considered in accordance with Development Strategy in the Core Strategy i.e. the split of development and the sequential selection of sites. Development in other Key Service and Local Centres and the network of smaller hamlets and villages should also still be considered in accordance with the development strategy in the Core Strategy.

The Type of Sites Required

- 8.22 The Cumbria and Lake District Joint Structure Plan and the South Lakeland Local Plan have grouped employment sites into three 'market sector' categories, Strategic Employment Sites, Science / Business Parks and Local Employment Sites. Over the period 2006-2011 85% of employment development has occurred on Local Employment Sites and the remaining 15% on own use sites. Over this period no development has been recorded on Strategic Employment Sites or Science / Business Parks¹⁵.
- 8.23 Given the historic take-up by market sector (and supported by the type of site requested by respondents to the 2005 business survey), it is appropriate that the majority of allocated sites should be local employment sites. On the basis of historic take-up alone it is difficult to gauge the demand for Strategic Employment Sites and Science / Business Parks. Respondents to the 2005 business survey did indicate demand for such sites (25% expressed a desire for strategic employment sites and 32% for business parks).

¹⁵ Source: Cumbria County Council ELA Schedules

- 8.24 Given the definition of strategic employment sites and business / science parks, it is appropriate that such development is allocated in or near to Kendal and Ulverston. The precise location and size of such sites will undoubtedly be driven by the availability of suitable land.
- 8.25 Based on historic take-up, enquiries for employment land and premises and findings from the business surveys it is apparent that there is demand for a range of B1, B2 and B8 employment premises. The employment projections prepared as part of this study suggest that sites required to meet projected business growth should comprise 0.8 hectares B1 (12% of projected 6.2ha required), 1.5 hectares B2 (24% of projected 6.2ha required) and 3.9 hectares B8 (63% of projected 6.2ha required). Analysis of take-up and recent development / market activity and findings from the business surveys suggests that development to accommodate latent and future demand will be predominantly for B1, followed by B2 and B8.
- 8.26 Historic take-up and future demand is consistent insofar as it is predominantly smaller premises, typically units less than 5,000 sq.ft for B1 uses and less than 10,000 sq.ft for B2 and B8 uses that are generally required. There have been and will undoubtedly continue to be a small number of significant developments and it is important that land is available to meet these requirements.
- 8.27 On the basis of the information available, it is difficult to precisely define the type of development required by sector or use classification. Land and premises are required to satisfy the broad range of local business and will include a mix of offices, light and general industrial units and storage and distribution facilities.

Demand for B8 sites

- 8.28 Despite benefiting from two junctions on the M6 motorway, South Lakeland does not fit the typical profile for major storage and distribution facilities. Typically, developers and occupiers of such premises are looking for sites based on their proximity to major international transport nodes (ports and airports) and the proximity to the business base that the facility will serve. Typically this means sites situated on the motorway or trunk road network with excellent access to major conurbations. Whilst such facilities are focused on the motorway and trunk road network, the stretch of the M6 motorway running through South Lakeland is not considered attractive due to the distance from major ports and airports and equally from major conurbations.
- 8.29 There is apparent demand for the B8 storage and distribution development in South Lakeland, although analysis of historic take-up and enquiries for employment land and premises and consultation with commercial property agents confirm that such demand is small in scale and

derived from or serving local business. Typically the scale of demand for B8 premises is for units under 10,000 sq.ft, although exceptionally up to 20,000sq.ft. Cumbria County Council's ELA schedules record only 0.02ha being developed for B8 over the five years April 2006 – March 2011.

- 8.30 The limited demand and scale of potential B8 development in the LDF area is such that it can be accommodated on local employment sites and/or strategic employment sites alongside other employment uses. A dedicated B8 site is not considered necessary and given the very limited historic development of B8 is unlikely to be an attractive development proposition.

The Need for a Strategic Employment Site and a Business Park to serve Ulverston

- 8.31 Ulverston has a good technological base. It is home to an important supply chain linked to BAE systems shipbuilding in Barrow in Furness and is also the home of Glaxosmithkline. However, in common with the rest of South Lakeland historic take-up has generally been small scale by locally rooted businesses.
- 8.32 Expro Connectors completed development of a substantial new facility on 4.7 hectares at Low Mill Tannery in 2010. This scale of development is not common in Ulverston or South Lakeland, but such development is obviously very important to the local economy. Given the definition of the various employment sites, the Expro Connectors development would perhaps have been expected on a strategic employment site. However, Low Mill Tannery is allocated as a local employment site. This perhaps serves to affirm, it is the availability and suitability of land that is key to its development and not necessarily its allocation and classification.
- 8.33 Respondents to the 2005 business survey did suggest that they would favour provision of Strategic Employment Sites and Business Parks. However, the survey didn't question whether these types of sites are favoured in Ulverston or Kendal (or indeed both locations).
- 8.34 There may be aspirational demand for a variety of employment sites in Ulverston including a Strategic Employment Site, a Business Park and local employment sites, but in reality the scale of development in the Ulverston area is very unlikely to support development of different employment sites to serve each of the three market sectors. Rather, provision of a good quality supply of employment land suitable for the full range of Class B uses is more important. This approach has two potential benefits:
- providing competition between sites for potential occupiers irrespective of their business type; and /or,
 - potentially focusing development on a particular site giving developers the necessary scale and take-up of development to ensure development viability.

- 8.35 From a market perspective it is difficult to justify allocation of a Strategic Business Site or Business Park in Ulverston. The nature and scale of typical development simply do not justify the scale of plots or dedicated nature of uses that they would provide. Rather, good quality employment sites capable of providing for a broad range of business needs are key.

9 Matching Supply and Demand

Introduction

9.1 This section provides an assessment of the capacity of existing and potential employment sites within the LDF area. Taking account of the picture of future requirements, the assessment considers the following opportunities:

- Existing commitments (identified in the Employment Land Availability Schedules)^{16/17}
- Sites emerging through the Land Allocation DPD for potential employment use¹⁸
- Other potential sites

9.2 Following the site visits to the existing commitments, visits were also conducted to each of the emerging employment and other potential sites. A site proforma was completed for each site recording the physical characteristics of the site, suitability for development, observations of development or marketing activity and perceptions about potential market interest. Results of these site visits are recorded in the sites schedule at Appendix A, together with a blank proforma.

9.3 The section presents a review of the potential sites by reference to the principal and key service centres and rural settlements in the Cartmel Peninsula, east and west of the district. A traffic light assessment of the existing commitments and potential supply is included at Appendix B. Sites highlighted green are assessed to offer good potential for employment development, amber highlighting suggests a fair site and those highlighted red should probably be discounted.

Kendal

9.4 Remaining employment sites in Kendal typically serve small local employment needs. The small number of available commitments are local employment sites of less than 0.5ha, situated in the north, west and south of the town. The single exception to this is the business park site at Shenstone House (ELA ref. 5/073). This site was assessed in section 5 of this report and does not appear to be available. A commitment at Boundary Bank (ELA ref. 5/278 & DPD ref. E33) along with the expired commitment at Riverside Business Park (ELA ref: 5/204) appear to be suitable and available sites for local employment, but both sites are less than 0.3ha.

¹⁶ Employment Land Availability Schedules include Local Plan Allocations and sites with planning permission for employment use.

¹⁷ Sites taken from the Employment Land Availability Schedules are identified by the prefix ELA

¹⁸ Sites taken from the Spring 2011 Emerging Options Consultation are identified by the prefix DPD

- 9.5 Shap Road Industrial Estate (ELA ref. 5/002) is another existing commitment that whilst development appears to be underway may still be available. The second phase (on the southern part of the site), which we understand was not part of the original commitment appears to be still available for development.
- 9.6 Given the very limited supply of committed employment sites and the paucity of potential brownfield sites for new employment development greenfield releases are essential in or adjoining Kendal to meet future employment needs. The Spring 2011 Emerging Options Consultation Land Allocations DPD proposes a small number of such releases to provide local employment sites, strategic employment sites and a business / science park.
- 9.7 Land at Scroggs Wood, off the A6, Milnthorpe Road (DPD ref. E4M) is identified as a potential strategic employment site suitable for B1 b and c, B2 and B8 development. The land, which is currently in agricultural use, extends to some 17.90ha, (approx 8.00ha net developable). It is a gently undulating site with a fall from north to south. A new access would be required of the A6 Milnthorpe Road. It has good access to the regional highway network and does not suffer with the congestion issues associated with the north of the town.
- 9.8 Land south of K Shoes, Natland Road (DPD ref. E31M) is identified as a potential local employment site suitable for B1, B2 and B8 development. The site is a logical extension to Riverside Business Park. It is also in existing agricultural use, gently undulating with a fall from south to north. A new access would be required off Natland Road.
- 9.9 Land East of Burton Road (DPD ref. M2M) is identified as a potential business / science park suitable for B1 development. The site is in existing agricultural use and extends to some 6.52ha. It is approximately 500 metres south of Westmorland General Hospital. The site is gently undulating but with a steep bank falling from the A65 Burton Road. A new access would be required off Burton Road.
- 9.10 The three greenfield sites on the southern edge of Kendal (DPD refs. E4m, E31M and M2M) are all suitable for employment development. Given the existing employment uses in the vicinity of these sites, good access to the highway network and the scale of potential development, these sites are each considered good development propositions. However, the scale of the Scroggs Wood and Burton Road sites and the likely infrastructure costs to prepare the sites for development, might necessitate phased development to concentrate employment development on each site in turn. This focus of development on one site at a time, will help to accelerate development, enabling developers to increase development delivery, thereby reducing borrowing costs against site infrastructure.

- 9.11 The Land Allocation Further Consultation put forward land north of Meadowbank (DPD ref. E23K#) as a potential employment site. The site is in existing agricultural use and extends to some 5.33ha. The site relates well to the established employment uses on Shap Road Industrial Estate. It is an undulating site and a new access would be required off the A6. Existing traffic congestion in and around Kendal Town Centre could be exacerbated by further development north of the town and the highways authority are opposed to further B8 development in this location. The site could be allocated as a local employment site for B1 and B2 uses.
- 9.12 An Area Action Plan is currently being prepared for the Canal Head Area. This site is currently occupied by Gilkes, a company that manufacture pumps and a mix of smaller companies in an old industrial unit. The sites future is clearly dependant on the intentions of Gilkes and it will not come forward until alternative accommodation is found. Uses proposed for the area are likely to be mixed and include retail, residential and employment.
- 9.13 If the large former quarry site at Kendal Fell which is within the Lake District National Park LDF area (but adjoining the South Lakeland LDF area) becomes available, potential exists for employment development, potentially including B8 use on this site with the opportunity to create direct access onto the A591.

Ulverston

- 9.14 Existing employment premises in Ulverston are in the main small and medium sized sites allocated on the south side of town that meet local employment need.
- 9.15 A principal area for general industrial and business uses is Low Mill Tannery (ELA ref. 5/016A & 5/016B and DPD ref. EN22 & EN23). The site consists of three phases, two of which (phases 1 and 3) were considered in the Emerging Options Land Allocations Consultation (phase 2 has now been developed out and occupied by Expro Connectors). What's left of Phase 1 (ELA ref. 5/016A and Allocation DPD Ref. EN22) is 0.75ha serviced plot. The majority of Phase 1 ((Low Mill Business Park), a previously developed site, which was subject to a development brief (September 1997) and investment from NWDA and SLDC to reclaim its derelict core, has been developed. The vacant plot has a made access to the north west of Low Mill Business Park. Phase three (ELA re. 5/016B & DPD ref. EN23), to be brought forward once phase one is utilised, includes the development of a Greenfield site currently used for agriculture. The remaining plot on Phase One should be protected for future employment development. Phase three is known to suffer from significant constraints (primarily ground conditions) and other sites in Ulverston are favoured over it.

- 9.16 The Land Allocation Further Consultation put forward two sites off Morecambe Road / Sandside Road (DPD ref. MN30# & M14#) for employment development. Site MN30# adjoins the Low Mill Business Park being adjacent to its western boundary. Site M14# is to the west of MN30#. Site MN30# is 0.64ha and M14# is 1.19 ha. Both sites are flat level sites and are currently in agricultural use. MN30# is partly in flood zone 3b and most of M14# in flood zone 3b. Either site could be developed in isolation or combined to form a larger site. A new access will be required off Morecambe Road.
- 9.17 The Spring 2011 Emerging Options Land Allocations Consultation proposes land at Lightburn Road (DPD ref. M11M) for a Business/Science Park with B1 use only. The site of approximately 4.0ha is located to the west of Ulverston and includes Greenfield land outside the development boundary identified in the adopted Local Plan. The land currently used for agriculture and a single dwelling, has undulations and a south-west facing aspect. The site is located on the busy A590 trunk road and a new junction may be required to access the site safely. Should this land be allocated it could provide a significant site for future B1 use and potentially other employment uses although we anticipate a potential need for part of the site to be released for higher value uses to ensure its delivery given the access and topographical issues on the site. It is noted that the eastern end of the site emerging options site DPD M11M (the part of site M11M east of Beehive Cottages) is not put forward as a potential employment site in the LDF evidence base study – The South Lakeland Employment and Housing Land Search Study. This evidence based study looked at potential areas for development on the edge of the towns and larger villages, primarily from a landscape perspective.
- 9.18 The Land Allocation Further Consultation put forward two variations on the potential development of site M11M. DPD ref. E19# is 3.10ha comprises of the central and eastern part of M11M and is proposed for mixed use development. DPD ref. MN6# is 0.87ha including only the western quarter of site M11M. It is also put forward for potential mixed use development.
- 9.19 Ulverston Canal Head has a cluster of potential sites, a number of which were covered by The Ulverston Canal Masterplan 2005, which aimed to make a substantial difference to the economy of the town. Two sites (DPD ref. E30 & DPD ref. M26) are put forward as Strategic Employment Sites for B1, B2 and B8 in the Spring 2011 Allocations of Land Emerging Options Consultation. Both of these, accessed off Next Ness Lane, are greenfield sites currently used for grazing. Standing water was observed on them during the site visit and they are within the floodplain (the majority of site DPD ref. E30 is in flood zone 3a, with a small bit in zone 2 and the eastern half of DPD ref. M26 is in flood zone 3a and western half in zone 2). A third site (DPD ref. M28) is situated off the main A590 and is currently used for a cattle auction market,

scrap yard and other small-scale manufacturing and distribution uses. The site is in a number of separate ownerships. There are proposals for a mixed-use scheme here, including housing, leisure and heritage linked to the former canal head use. There are a number of traditional premises here, and it is understood that there may be a potential ownership issue. Assuming the identified site constraints may be overcome these sites (DPD ref. E30 and M26) should be allocated for future employment use and site M28 allocated for mixed uses.

- 9.20 The Land Allocation Further Consultation put forward an alternative to site M28. DPD ref. MN31# includes and extends site M28, with the addition of Booth's landholdings, the petrol fillings station and Lakes Glass Centre. Site MN31# is 6.81ha, a significant increase over site M28 that measures 3.83ha. As with M28, site MN31# is also put forward for mixed development. The motives for allocating Booth's foodstore, the petrol filling station and Lakes Glass Centre for mixed use development are not obvious. These three businesses are each in modern premises and continuing to trade. Unless a new and significantly larger foodstore is proposed on this site, the costs of relocating the existing businesses and clearing the site for redevelopment will almost certainly make new employment or mixed use development unviable. There appears to be little merit in allocating site MN31# ahead of M28, unless a significantly larger foodstore is an appropriate component of the regeneration of the Canal Head.
- 9.21 Land at North Lonsdale Road (DPD ref. EN35M) was surveyed but advice from the Council's Environmental Protection Section (re. surface water flooding) is that there is a significant flood risk here and the site should be removed from the employment land allocation.
- 9.22 Land South of Kennedy Street (DPD ref. R283M) is a site identified as suitable for local employment needs in the Spring 2011 Emerging Options Land Allocations Consultation. This site is currently used by GEN II Furness Skills Centre and is bounded to the north-east, east and south-east by Glaxo Smith Kline. The site suffers from surface water flooding. Prior to development of this site it would be necessary to demonstrate development would not cause or exacerbate flooding in the immediate local area. Subject to flooding issues being addressed the site is otherwise suitable for local employment use.

Grange-over-Sands

- 9.23 The former refuse destructor site accessed from Cardrona Road/Allithwaite Road is an existing Local Plan allocation for B1 and B2 employment uses. It is referred to in both the Employment Land Allocations Schedule and Spring 2011 Emerging Options Land Allocations Consultation (ELA ref. 5/168 & DPD ref. R350M). The site is currently vacant and has residential uses at the southern boundary. Given the former use, the use of this site for B1 and B2 would not adversely affect the landscape character, but conditions on operation may

be appropriate given the neighbouring residential use. The Spring 2011 Emerging Options Land Allocations Consultation identifies the site for 50:50 residential / local employment, which appears appropriate to serve local employment and protect the amenity of neighbouring residential properties.

- 9.24 Three sites at Berners Pool were included in the Spring 2011 Emerging Options Land Allocations Consultation (DPD ref. M378M, R383 & R381) for B1 use. M378M is currently used as a hard surfaced car park, R383 was previously used for a lido/swimming pool and R381 is currently vacant land and premises. A mixed-use scheme for employment, residential and leisure is proposed here, however there is understood to be viability issues. A development brief/ master-planning exercise may help bring the sites forward as a coherent whole and overcome viability issues, however the employment component may not be significant in providing for local employment needs.

- 9.25 Land at Kent Banks Road (DPD ref. MN21) was proposed in the Spring 2011 Emerging Options Land Allocations Consultation. This site is a green-space adjacent a church and opposite the Cooperative supermarket and other small shops. It is understood that this site is not available for development. It is also considered that this site would not contribute significantly to the local employment needs and should not be proposed for allocation.

- 9.26 Land adjacent to Station Yard is understood to have been bought by the hotel opposite to protect its estuary views. This site is therefore no longer available for employment use and should not be proposed for allocation.

Kirkby Lonsdale

- 9.27 There are no existing undeveloped employment land commitments in Kirkby Lonsdale. The Spring 2011 Emerging Options Land Allocations Consultation DPD identifies three potential employment sites in Kirkby Lonsdale – two employment sites, land east of Dodgson Croft and land west of Health Centre (DPD refs. R640 and MN24 respectively), and a mixed use site, land west of Fairbank (DPD ref. R127M). All three sites appear generally suitable for employment development, although Land East of Dodgson Croft is now being promoted for residential development with pre-application discussions having occurred. It would, therefore, appear unlikely that this site is now available for employment development.

- 9.28 Land west of the Health Centre is a small green space sandwiched between the health centre and the sports centre. Access to the site via the A6 might be difficult to achieve, in which case it would be necessary to secure access via the health centre car park. However, given the lack of available alternatives in the short term it is considered important that this site is protected as a local employment site.

- 9.29 The mixed use development on land north of Kendal Road provides a larger potential employment allocations. The site is available for development, but a development brief for the site is required. This combined with the scale of proposals suggest it is unlikely that this site will become available for employment use in the short term. Allocation of part of the site for local employment is desirable and particularly important if significant housing development is allocated.

Milnthorpe

- 9.30 Existing employment premises in Milnthorpe fall into two broad categories: premises to meet local employment needs; and premises at Mainline Business Park that provide for larger manufacturing and distributions business.
- 9.31 Bridge End Business Park, Park Road (ELA ref 5/171 and DPD ref M9M1 and M9M2) includes a number of serviced plots available to meet ongoing local employment needs. The site is suitable and available to meet local employment needs and should therefore be protected / allocated for employment use.
- 9.32 Land adjacent to Dallam Timber Yard (DPD ref EN17M) also on Park Road, approximately 600 metres to the west of Milnthorpe includes a number of stone buildings suitable for conversion to meet further local employment needs. The Dallam Tower Estate has provided a small range of employment and storage space has been created from converted buildings, which is well occupied. The land adjacent to Dallam Yard would compliment this existing offer and appears suitable for such use.
- 9.33 Mainline Industrial Estate provides a range of larger industrial premises, with existing (albeit dated) units available from 2,500sq.ft to 20,000 sq.ft. There are also proposals for new industrial units on the site including design and build opportunities. Land Adjacent to Mainline Industrial Estate (DPD ref. E13M) could provide for additional B2 and B8 development. However, a new access to this part of the site would have to be created and highway improvements on the B6385 (including improvements to a listed bridge over the Canal) would be required. Notwithstanding the viability issues associated with constructing a new access and highway improvements, other greenfield strategic opportunities adjoining Kendal are considered more appropriate for new B2 and B8 development. This site is considered more appropriate for local employment needs.

Rural Settlements in the East of the District

- 9.34 A number of rural settlements in the east of the district provide established employment sites. Burneside, Burton in Kendal, Crooklands, Gatebeck, Holme and Storth all having significant existing employment sites. There are existing commitments to extend a number of these

sites, including: Land at Clawthorpe Hall, Burton in Kendal (ELA ref. 5/211); Fallbeck, Gatebeck (ELA ref. 5/167); and Quarry Lane, Storth (ELA ref. 5/009). The Spring 2011 Emerging Options Land Allocations Consultation DPD identifies potential extensions to: Cropper's Papermill, Burnside (DPD ref. E32M); Clawthorpe Hall, Burton in Kendal (DPD ref. MN14M); Elmsfield Park, Holme (DPD ref. E18M); and Holme Mills, Holme (DPD ref. RN151M). Potential new employment sites are also identified at Burton in Kendal (DPD ref. EN14M), Endmoor (DPD ref. M41M), Heversham and Leasgill (DPD ref. E15M) and Hincaster (DPD ref. EN43). Potential redevelopment of poor quality existing employment sites is also identified in Crooklands (DPD ref. RN16M) and Sandside (DPD ref. M683sM – this site duplicates ELA ref. 5/009). The Land Allocation Further Consultation put forward three additional new sites for employment development at Endmoor (DPD ref. EN59#), Gatebeck (DPD ref. EN33#) and Heversham (DPD ref. EN57#). The Land Allocation Further Consultation also put forward a larger allocation adjoining Croppers Papermill, Burnside (DPD ref. E32#).

- 9.35 The potential supply of employment on these sites exceeds the projected requirements. Assessment of the potential sites also highlighted variations in suitability and market demand for sites. Market demand for additional employment land in the rural settlements is likely to be strongest for those sites in the vicinity of established employment sites. These existing sites fall into two categories: sites with major single occupiers; and, established multi-let industrial estates or business parks.
- 9.36 Extensions to those employment sites occupied by major local employers, such as Croppers Paper Mill at Burnside will be crucial to the success of their future operations and should be supported wherever possible. Extensions to existing rural business parks and industrial estates have been assessed based on suitability and accessibility and the following sites have been assessed favourably.
- Clawthorpe Hall, Burton in Kendal (ELA ref. 5/211 and DPD ref. MN14M) - a business centre providing a mix of small office units and a conference suite. Planning permission exists for development of vacant land to the south of the hall to extend the existing office facilities (ELA ref. 5/211). Further expansion to the rear of the hall (DPD ref. MN14M) would provide additional B1 and B2 development. The site has reasonable transport links and whilst there are highways concerns about further development as an existing employment site it is better than many alternatives and (with appropriate screening) would have a limited impact on the local landscape.
 - Fallbeck, Gatebeck (ELA ref. 5/167) – expansion to this established rural employment site could provide additional B1 and B2 development. Development would have a minimal

impact on the local landscape, but site accessibility is not good and additional development should perhaps be restricted for expansion of existing operations on site.

- Elmsfield Park, Holme (DPD ref. E18M) – an established business park providing business and industrial units and open storage. The site would form an extension to the existing business park suitable for B2 and B8 development. Development would have a limited impact on the local landscape.
- Land at Gilpin's Bridge, nr Levens (DPD ref. EN10 & EN11) – Adjoining land already includes employment uses (including vehicle sales and maintenance). Development of these two sites for local employment (B1, B2 and B8) could compliment these existing businesses. The sites are a short distance from Levens, but vehicular access to the sites is good. Development (with appropriate screening) would have a limited impact on the local landscape.
- Yans Lane, Sandside / Quarry Lane, Storth (ELA ref. 5/009 & DPD ref. M683sM) – This site (it is a single site, although different titles are given in the ELA and the Spring 2011 Emerging Options Land Allocations Consultation DPD) is currently used by a small number of businesses occupying historic agricultural buildings. A number of existing businesses occupy neighbouring sites to the south and west. Redevelopment of the site for local employment (B1, B2 and B8) would appear appropriate. Existing site access is poor and will need to be improved. Development will have no negative impact on the local landscape.

9.37 The following sites would provide new employment in local service centres or smaller villages. It is more difficult to foresee a clear market for these sites, but rural employment sites in South Lakeland have been successful and business development in rural locations will be important to support the rural economy.

- Land at Peasey Bridge, Crooklands (DPD ref. RN16M) – This site is in use as a coach depot. The site has an existing access off the A65 and subject to the cessation of the existing use, the site appears suitable for redevelopment for local employment (B1, B2 and B8). Development (particularly with appropriate screening) would have a minimal impact on the local landscape.
- Land North of Sycamore Close, Endmoor (DPD ref. M41M) – This site is currently in agricultural use and would probably not be appropriate for purely employment development. The Spring 2011 Emerging Options Land Allocations Consultation DPD identifies the site for potential mixed use development and as part of such development a small element of employment (1ha or less) might be appropriate. Development will have an impact on the local landscape and appropriate screening and landscape works will be an essential element of any development scheme. The Land Allocation Further Consultation put forward a much larger site (DPD ref. EN59) for mixed uses. This site is

immediately north of M41M. Again, this site would probably not be appropriate for purely employment development.

9.38 The following sites have been assessed and discounted. Generally these sites have been discounted because more favourable locations or development sites exist.

- Land at Green Dragon Farm, Burton in Kendal (DPD ref. EN14M) – This site is currently in agricultural use. Extension of the established employment use at Clawthorpe Hall is favoured over this site.
- Land at Gatebeck Road, Gatebeck (DPD ref. EN33#) – This site is currently in agricultural use. Extension of the existing Fallbeck employment site is favoured over allocation of this new site in the open countryside.
- Land at Prince's Way, Heversham & Leasgill (DPD ref. E15M & EN57#) – These two sites are currently in agricultural use. DPD ref. E15M is to the rear of a small number of business and trade counter units. DPD ref. EN57# is immediately south of the business and trade counter units. Despite the adjoining use, it is considered that better locations and sites exist for employment development.
- Land at Greenside Farm, Hincaster (DPD ref. EN43) – This site is currently in agricultural use, although the existing agricultural buildings appear underused and potentially redundant. However, it is considered that better and more accessible sites exist for employment development.
- Land at Milnthorpe Road, Holme (DPD ref. M35M) – This site is in existing agricultural use. Extension to the established Elmsfield Park is favoured for new employment development over this site.
- Land at Holme Mills, Station Road, Holme (DPD ref. RN151M) – This site is in existing agricultural use. Extension to the established Elmsfield Park and Clawthorpe Hall area favoured for new employment development over this site.
- Land Opposite Lane End Farm, Levens (DPD ref. RN121M) – This site appears to have been in historic employment or storage use, but is now redundant. The developable area of the site is limited and assuming the site is developable, it is perhaps better suited to residential development.

Rural Settlements in the Cartmel Peninsula

9.39 Moor Lane, Flookburgh (ELA site ref. 5/017 and DPD Ref. EN25) is a Greenfield site identified in the Local Plan as a local employment site suitable for B1, and B2 development. The site would form an extension to the existing business park at Moor Lane. The site has good transport links and would not adversely impact on the local landscape given the existence of employment uses already. The site is within the floodplain and there are potential concerns

re. flooding. Development would need to have regard to the North West Shoreline Management Plan. Subject to flooding issues being addressed the site is otherwise suitable for local employment use.

Rural Settlements in the West of the District

- 9.40 The site at Foxfield Road in Broughton in Furness (DPD ref. MN19) is the most remote and western in the District included in the Spring 2011 Emerging Options Land Allocations Consultation DPD and serves only local employment need. The site is currently underused with only part of the site in use and the other existing in a neglected, vacant condition. The site is proposed for B1, B2 and B8 use. The site is important for local employment need, however modern formats such as live/work space could be considered to encourage the development of premises suitable for growth/knowledge-based/creative industries.
- 9.41 Station Road in Cark is included in the Spring 2011 Emerging Options Land Allocations Consultation DPD (DPD ref. EN42). It is an existing employment site. The site is well occupied, with current occupiers including W.F. Wilkinson & Son Approved Coal Merchants, The Furness & South Cumberland Supply Association, South Lakeland Paints, and Cabana Soft Drinks on Draught. The site provides for local employment need and should therefore be allocated for employment use.

Junction 36, M6 Motorway and A590 Corridor

- 9.42 A number of sites have been put forward for consideration at Junction 36 of the M6 motorway, including sites on the south west (DPD ref. E56#), north east (DPD ref. E58#, M7#) and south east quadrants (DPD ref. E57# & EN18#). Additional sites have also been put forward for consideration along the A590 corridor close to junction 36, including sites near Sedgewick at the Brettargh Holt Roundabout (DPD ref. E50# & E51#) and at Deepthwaite (DPD ref. E61# & E62#). The north east quadrant includes the Millness Hill Caravan Park and agricultural land. The south east quadrant includes the Moss End Business Village (a modern development of industrial and office units in former agricultural buildings), the new Agri-Quarter where development has commenced on the new Kendal Livestock Auction Market (comprising a 76,000sq.ft market and 17,700sq.ft ancillary business units) and agricultural land. The south west quadrant is in existing agricultural use, with access off Moss End Lane (linking to J36 via the A590). The Deepthwaite sites are approximately 1 kilometre west of Junction 36 and the Brettargh Holt Roundabout sites are approximately 5 kilometres west of it. These sites are all situated in the open countryside.
- 9.43 Having undertaken an initial desk top appraisal of these three quadrants and the A590 corridor, the south east quadrant was assessed to be the most logical location for new employment development (particularly given the Moss End Business Village and Agri-Quarter

developments). The two sites within this quadrant (DPD refs. E57# & EN18#) have then been assessed as part of the overall assessment of potential employment sites. EN18# is being developed for the Agri-Quarter and is no longer available, leaving E57# for further consideration.

- 9.44 Given the location of the sites at Junction 36 it is appropriate to consider whether sequentially preferable sites exist that are available, suitable and deliverable for employment development. The scale of the site at J36 is such that it could be a Strategic Employment Site, a Business Park or if only part of the site is developed a Local Employment Site. Sequentially preferable sites that are available, deliverable and more suitable exist on the edge of Kendal that are capable of accommodating Strategic Employment Site and Business Park development. Equally, sequentially preferable sites that are available, suitable and deliverable exist in and on the edge of Kendal and Milnthorpe, and in Burton in Kendal and Crooklands for Local Employment Sites. It is not therefore deemed appropriate to allocate land at Junction 36 for further employment development.

Sites for B8 storage and distribution in the Kendal area

- 9.45 We have concluded that existing and potential demand for B8 premises in Kendal can be accommodated on Local Employment and / or Strategic Employment Sites. It is important that sites for B8 use are well related to the primary route network. A number of the sites that were identified in the Spring 2011 Emerging Options Land Allocations Consultation DPD will be suitable for B8 development. There could be an element of B8 development at Scroggs Wood, Milnthorpe Road (DPD ref. E4M) which has good access to the trunk road and local highway networks. The anticipated scale of such development is only likely to occupy part of this allocation and could operate alongside other B1 and B2 uses. B8 development at this location would need to take into account the sensitivities of the site, including landscape character, the key gateway location and residential/high quality local amenity.

Ulverston Strategic Employment Site & Science / Business Park

- 9.46 We have concluded that a dedicated strategic Employment Site and Science / Business Park are not essential in Ulverston. More important is the provision of quality employment land to meet a range of employment uses and prioritised to support development delivery. The sites that we've supported in Ulverston are not without constraint, but they do offer the potential quality of employment land to meet anticipated demand.

10 Conclusions & Recommendations

Introduction

- 10.1 The purpose of this study was to provide a robust, evidence-based review of SLDC's employment land allocations. It sought to:
- Quantify the need for new employment / economic development allocations;
 - Identify gaps in the current employment land and premises portfolio;
 - Review and advise on the suitability, market attractiveness and deliverability of the sites currently suggested for employment / economic development uses in the Spring 2011 Emerging Options Land Allocations Consultation DPD as well as new and alternative potential sites;
- 10.2 The final section of this report presents a series of conclusions regarding the questions that the study has sought to address.

A Picture of Future Requirements

The Quantity of Employment Land

- 10.3 Employment forecast based land requirement projections suggest a total requirement for the plan period (2010 – 2025) of 6.2ha. Evidence is that average annual take-up is just under 2.00ha. Making an allowance of 20% for choice and competition, this suggests an annual requirement of 2.40ha employment land or 36ha for the plan period 2010-2025.

The Location of Employment Sites

- 10.4 The Core Strategy identifies the development strategy for the district with development concentrated in the principal service centres of Kendal and Ulverston. The development strategy provides the following distribution of development, which has been used to calculate the approximate amount of employment land by location:

Table 10.1: Location and Quantum of Employment Land

| Location | Percentage Split | Land (ha) |
|---|------------------|--------------|
| Kendal | Approx 35% | Approx 12.60 |
| Ulverston | Approx 20% | Approx 7.20 |
| Milnthorpe, Kirkby Lonsdale and Grange-over-Sands | Approx 13% | Approx 4.68 |
| Network of Local Service Centres | Approx 21% | Approx 7.56 |
| Network of smaller villages and hamlets | Approx 11% | Approx 3.96 |

- 10.5 In the principal service centres of Kendal and Ulverston, opportunities for brownfield development in the urban area are very limited and it is necessary to consider edge of town greenfield sites to meet future demand. Equally, it is likely elsewhere in the district that extensions to established employment sites will be necessary on greenfield land.

The type of sites required

- 10.6 On the evidence of historic take-up and responses to the 2005 and 2010 Business Surveys it is apparent that the majority of take-up has been of Local Employment Sites, with typical demand for premises at the smaller end of the property spectrum (typically up to 5,000 sq.ft for office and up to 10,000 sq.ft for industrial and warehouse premises).
- 10.7 Recent incidents of more substantial property development (i.e. Expro Connectors development on 4.7ha at Ulverston) have still been delivered on Local Employment Sites.
- 10.8 It might be appropriate in Kendal to identify specific Business Park and Strategic Employment Sites and elsewhere in the district a good supply of local employment sites will meet the local demand. In Ulverston a good supply of quality employment sites (Low Mill Business Park for Example) is key. Demand for sites in Ulverston will likely continue to be small scale with odd larger requirements (such as the recent Expro Connectors development). Provision of various types of site (a Strategic Site, a Business Park and Local Employment Sites) will potentially create excessive competition and uncertainty for landowners and developers, thereby constraining development. A clear phasing plan will help to focus the delivery of allocated sites, providing developers with the certainty and confidence that will help them to deliver necessary preliminary works to deliver sites.

Taking Stock of the Current Supply

- 10.9 Most of the existing employment commitments are small in size and will serve only small local employment requirements. A number of these sites are within rural settlements, where levels of local demand will be limited.
- 10.10 A number of sites have been identified but there appears to be some reluctance to actively offer them on the open market.
- 10.11 Main Line Industrial Estate east of Milnthorpe is being openly marketed for larger industrial requirements but this is for design and build units on a leasehold basis.
- 10.12 In Milnthorpe, Bridge End Business Park / Grisleymires Lane provides a range of development plots for B1, B2 and B8 use, but take-up has been slow.

- 10.13 It is considered there are virtually no industrial sites in Kendal which are available for immediate purchase and development. It appears that the remaining plot at Shap Road Industrial Estate is still available for development.
- 10.14 A small plot is available at the Riverside Business Park for B1a and B8 use. The site also appears suitable for B1b, B1c and B2 development.
- 10.15 In Ulverston, a single plot remains on phase 1 at Low Mill Tannery, whilst phase 3 is also undeveloped. Low Mill Tannery is allocated for B1, B2 and B8 uses. The remaining plot on phase 1 is a serviced plot with a made access and is available for development. Services and access are required for phase 2, which is also constrained by very soft ground conditions.
- 10.16 It is considered that there is no site capable of attracting or accommodating major employment development (over 1ha) in the LDF area.

The New Portfolio of sites

- 10.17 The Spring 2011 Emerging Options Land Allocations Consultation DPD identifies a wide range of employment sites that were adequate to meet the original target of 60ha employment land identified as necessary in the 2005 Employment Land Review. It includes a variety of potential employment sites by type and location.
- 10.18 This study has concluded that a lower employment land supply is needed to meet local demand and this study has focused on assessing the suitability, market attractiveness and deliverability of the Spring 2011 Emerging Options Land Allocations Consultation DPD sites (as well as a small number of other alternative sites that have potential arising from the Summer 2011 further consultation – notably sites at Junction 36 of the M6 motorway).
- 10.19 Initial opinions on sites suitability, deliverability and market attractiveness were made during visits to each site. These opinions were discussed amongst the consultant team and sites assessed according to a traffic light assessment, whereby green highlights sites that are largely free from significant constraints and with good market attractiveness, amber highlights sites with development constraints or lower market appeal and red highlights sites with significant development constraints or low market attractiveness.
- 10.20 Having completed the traffic light assessment, the portfolio of favoured potential sites was selected from green and amber sites to provide a mix of sites that reflect the demand for employment sites, the development strategy in the LDF Core Strategy, and the plan period of 2010-2025.
- 10.21 The favoured portfolio of potential sites is:

Table 10.2: Favoured Portfolio of Potential Sites

| DPD/ELA Site Ref | Settlement | Address | Employment Land (ha) | Suitable Uses* |
|----------------------------------|----------------------|--|----------------------|----------------|
| Principal Service Centres | | | | |
| Kendal | | | | |
| EN28M | Kendal | Land at Shap Road Industrial Estate | 0.34 | B1, B2, B8 |
| E23K# | Kendal | Land North of Meadowbank | 5.33 | B1, B2 |
| DPD E4M** | Kendal | Land at Scroggs Wood, Milthorpe Road | 8.00 | B1, B2, B8 |
| ELA 5/204 | Kendal | Riverside Business Park, Natland Road | 0.29 | B1, B8 |
| DPD E31M | Kendal | Land south of K Shoes, Natland Road | 1.19 | B2, B8 |
| DPD E33 (ELA 5/278) | Kendal | Land at Boundary Bank | 0.93 | B1, B2, B8 |
| DPD M2M | Kendal | Land east of Burton Road | 6.52 | B1 |
| | Kendal | Canal Head AAP*** | 0.00 | B1 |
| | | Sub Total | 22.60 | |
| Ulverston | | | | |
| DPD EN22 (ELA 5/016A) | Ulverston | Phase 1, Low Mill Tannery | 0.72 | B1, B2, B8 |
| DPD R283M | Ulverston | Land south of Kennedy Street | 1.56 | B1, B2, B8 |
| DPD M26/E30 | Ulverston | Land at Ulverston Canal Head | 6.40 | B1, B2, B8 |
| DPD E19# | Ulverston | Land at Lightburn Road | 3.10 | B1 |
| | | Sub Total | 11.78 | |
| Key Service Centre | | | | |
| DPD R350M (ELA 5/168) | Grange | Land at Allithwaite Road (Former refuse site) | 0.55 | B1 |
| MN25M | Grange | Land at Allithwaite Road | 1.00 | B1 |
| DPD MN24 | Kirkby Lonsdale | Land west of Health Centre | 0.24 | B1 |
| DPD R127M | Kirkby Lonsdale | Land north of Kendal Road | 1.70 | B1, B2, B8 |
| DPD M9M1 (ELA 5/171) | Milnthorpe | Land adjacent to Bridge End Business Park, Park Road | 1.45 | B1, B2 |
| DPD M378M**** | Grange | Berners Pool | 0.35 | B1 |
| DPD R381**** | Grange | Berners Pool | 0.00 | B1 |
| DPD R383**** | Grange | Berners Pool | 0.00 | B1 |
| | | Sub Total | 5.29 | |
| Local Service Centres | | | | |
| DPD MN19 | Broughton in Furness | Foxfield Road | 0.73 | B1, B2, B8 |
| DPD MN14M | Burton in Kendal | Land adjacent to Clawthorpe Hall (off A6070) | 0.58 | B1 |
| ELA 5/211 | Burton in Kendal | Land adjacent to Clawthorpe Hall (off A6070) | 0.54 | B1 |
| DPD EN42 | Cark | Station Yard | 1.61 | B1, B2, B8 |
| DPD E18M | Holme | Land at Elmsfield Park | 3.03 | B2, B8 |
| DPD M683sM | Sandside | Land North of Yans Lane | 1.64 | B1, B2 |
| DPD E32M | Burneside | Land adjacent to Cropper's Papermill | 1.18 | B1, B2 |

| | | | | |
|---|--|--|--------------|------------|
| | | Sub Total | 9.31 | |
| Smaller Villages, Hamlets and Open Countryside | | | | |
| DPD RN16M | Crooklands | Land at Peasey Bridge | 0.66 | B1, B2, B8 |
| ELA 5/167 | Gatebeck | Fallbeck | 0.62 | B1, B2 |
| DPD EN10 | Open Countryside (nr Levens) | Land at Gilpin's Bridge | 0.62 | B1, B2, B8 |
| DPD EN11 | Open Countryside (nr Levens) | Land at Gilpin's Bridge | 0.26 | B1, B2, B8 |
| DPD EN17M | Open Countryside (nr Milnthorpe/ Sandside) | Land adjacent to Dallam Timber Yard, Park Road | 0.38 | B1, B2 |
| | | Sub Total | 2.54 | |
| | | Grand Total | 51.52 | |

N.B.

* Proposed use reflects existing committed use (planning permission or Local Plan allocation) or use put forward in Spring 2011 Allocations of Land Emerging Options Consultation

** Site measures 17.9ha, but only 8.0ha is estimated to be developable

*** An Area Action Plan is to be prepared for Kendal Canal Head. The AAP will provide detailed policy for this area, including the mix and quantum of land uses

**** Sites M378M, R381 and R383 comprise a single mixed development site. One third of the site is expected to come forward for employment and only one third of the total site area is included.

- 10.22 The total development land included in the schedule of potential sites exceeds the required land for the plan period of 36 ha. This excess results from the inclusion of a mix of sites in Kendal and Ulverston (including Strategic Employment, Business Park and Local Employment Sites) and in providing local employment sites in a number of local service centres.

Recommendations

- 10.23 The supply of committed employment sites is offering an increasingly limited range and mix of employment opportunities, particularly in Kendal. SLDC should advance the Land Allocations DPD as a priority.
- 10.24 Sites identified in the list of potential employment sites appear suitable, deliverable and have good market attractiveness and merit serious consideration for allocations in the Land Allocations DPD.
- 10.25 We have recommended a slightly lower employment land target than advocated in the 2005 Employment Land Review and the Joint Structure Plan. This revised target is based on robust evidence, including historic take-up and employment forecast based land requirement projections. Ongoing annual monitoring, including accurate records of take-up by employment sector and use classification, will be important to ensure a mixed portfolio of employment sites is maintained. In the event that future take-up consistently exceeds historic take-up an early review of employment land supply might be necessary.



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APPENDICES



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APPENDIX 1

Sites Database

| Site Ref | Settlement | Address | Source | Size (ha) | Type | Type 2 | Proposed Uses | Classification | Existing Use | Surrounding Uses | Compatability | Existing Boundaries | Existing Natural and Built Features | Topographical Features | Evidence of Watercourses | Noise and Smells | Access to the Site | Access Through the Site | Likely Impact on Views | Infilling or Rounding Off | Appropriate Density | Renewable Energy Potential | Scope for Mixed or Other Uses | Need for Mitigation | Market Perspective | Other Comments | |
|--|------------------|--|-----------------|-----------|------------|--------|----------------|------------------------------------|--------------------------------------|---|---------------------------------------|-------------------------------------|---|---|-------------------------------------|----------------------------|---|---|---|--|--------------------------|----------------------------|-------------------------------|----------------------------------|--|---|--|
| Existing Commitments | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Principal Service Centres | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5/002 | Kendal | Land at Shap Road Industrial Estate | ELA | 0.68 | Employment | LES | B1, B2, B8 | Brown | Vacant Land | Employment | None | Road | None | Flat level site | None | None | Pedestrian / Railway Station (near by) / Road / Bus Stops / Pavements | No access | None | Infilling | | Biomass | No | None | Small infill plot on established industrial estate. Proposals for car showroom with part of the site appearing to be under development whilst the southern part site appears to remian available. | Planning permission granted for car showroom and workshop on the northern part of the site which appears to be part under construction, the remainder of the site is vacant and appers available and should therefore be protected for future employment use. | |
| 5/278 | Kendal | Boundary Bank, Boundary Bank Lane | ELA | 0.26 | Employment | LES | B1c | Agricultural | Agricultural | Employment / Open Countryside / Household Waste | None | Tree Belt / Bank | None | Flat site with slight fall north to south | None | Adjacent household waste | Pedestrian / Road | Road / Lane | None | Infilling | | Biomass | No | None | Extension to established Kendal Fell Business Park. Check take-up with Pell & Co | Potential access / ransom to DPD site ref E33. | |
| 5/204 | Kendal | Riverside Business Park, Natland Road | ELA | 0.29 | Employment | LES | B1a, B8 | Brown | Employment / Vacant Land | Employment / Housing / Sewage Works | None | | None | Relatively flat | River | None | Pedestrian / Road / Pavements | Existing access off Natland Road | None | Infilling | | Biomass | No | None | Infill plot within Riverside Business Park that is evidently suitable and available for development. | | |
| 5/073 | Kendal | Sherstone House, Back Lane | ELA | 2.20 | Employment | B/SP | B1, B2, B8 | Housing / Employment | Brown | Open Countryside | Existing use | Hedgerow / Tree Belt | Trees / Office & Residential Properties | Undulating. Slight fall south to north and bank up from A6 into site | None | Road traffic noise from A6 | Road | via Back Lane | Negligible | Re-use / redevelopment of existing buildings | Open Countryside | Wind / Biomass | Residential | Landscaping / screening | Existing offices and residential property. Access needs to be improved and to date development proposals have not advanced. The site is not being marketed and development therefore seems unlikely. | Access works off A6 / A591 junction | |
| 5/016A | Ulverston | Phase 1, Low Mill Tannery | ELA | 0.75 | Employment | LES | B1 abc, B2, B8 | Brown | Vacant site | Open Countryside / Employment | Poor amenity vacant site | Walls / Fencing / Road | None | Flat level site | Floodplain / Standing water / Canal | None | Road | None | Impact on open countryside to north | Infilling | Adjoins open countryside | Wind / Biomass | None | None | A priority site. Need to realise regional investent here. | A development brief was preped for this site in September 1997. This site was brought forward by SLDC in partnership with former NWDA via ESF - should be prioritised for use. Same as EN22 but differing site area. | |
| 5/016B | Ulverston | Phase 2, Low Mill Tannery | ELA | 2.80 | Employment | LES | B1 abc, B2, B8 | Agricultural | Vacant Land | Open Countryside / Employment | Agricultural Site in Open Countryside | Walls / Fencing / Road | None | Flat level site | none | | Road | Footpath to southern boundary | Impact on surrounding open countryside | No | Adjoins open countryside | Wind / Biomass / LEN | Non | None | Not to be progressed unless Phase 1 occupied. | This site should only be considered following use of site 5/016A. This site is the same as Allocation DPD site:EN23. | |
| Key Service Centres | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5/168 | Grange | Land at Allithwaite Road | ELA | 1.10 | Employment | LES | B1 abc, B2 | Brown | Former Refuse site | Housing / Open Countryside | poor amenity due to refuse use | Road / Hedgerow / Tree belt | Trees | Flat level site | none | None | Road | None | Impact on residential neighbours, but possible improvement on former refuse use | Rounding off | Adjoins open countryside | Wind / Biomass / LEN | Residential | None | A good future employment site for B1 and B2. Possible contamination from refuse use. | This site is also Allocation DPD site ref: R350M. An understanding of possible contamination from previous refuse use is required | |
| 5/171 | Milnthorpe | Land adjacent to Bridge End Business Park, Park Road | ELA | 1.10 | Employment | LES | B1 abc, B2 | Agricultural | Agricultural | Employment / Housing / Open Countryside | None | Hedgerow / Walls | Trees | Slight undulation | None | None | Potential Ransom? | No access | Impact on neighbouring propertues | Infilling | | Biomass | No | None | Serviced plots provided and available. Good site to meet local employment needs. | Access into site needs to be explored - potential ransom? | |
| 5/007 | Milnthorpe | Station Yard | ELA | 4.50 | Employment | SES | B1 abc, B2, B8 | Brown | Brown | Employment / Open Countryside | None | No clear boundary | None | Flat level site | None | None | Road | Road / Lane | None | Infilling | | Biomass | No | None | Remaining infill plot adjoining established Mainline Business Park. Appears suitable for development, but no obvious signs of marketing. | | |
| Local Service Centre | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5/211 | Burton in Kendal | Land adjacent to Clawthorpe Hall (off A6070) | ELA | 0.54 | Employment | LES | B1a | Brown | Curtlage of existing business centre | Employment / Housing / Open Countryside | None | Hedgerow | None | Fairly flat level site | None | M6 Road Noise | Road / Bus Stops | Road Lane - existing access through Clawthorpe Hall Business Centre | Negligible | Infilling | | | | | Extension to established business centre. The site benefits from frontage to the A6070 and with local facilities in Burton in Kendal. | | |
| 5/017 | Flookburgh | Moor Lane | ELA | 1.10 | Employment | LES | B1 abc, and B2 | Agricultural | Open Countryside | Employment/ Open Countryside | None | Road / Fencing | None | Flat level site | Floodplain | None | Road | None | Views from surrounding open countryside | No | Adjoins open countryside | Wind / Biomass / LEN | None | None | A greenfield site adjacent to an existing popular business park. A useful extension site for local employment use - protect for future employment. | None. Also a site in the Allocation DPD ref: EN25 | |
| 5/009 | Storth | Quarry Lane | ELA | 1.20 | Employment | LES | B1 abc | Re-use of buildings / Agricultural | Agricultural / Employment | Employment / Housing / Open Countryside / Other - builders merchant | None | Hedgerow / Walls | None | Flat level site | None | None | Private lane to site | Existing lane off Storth Road | Negligible | Re-use / redevelopment of existing buildings | | | | | A number of existing businesses occupy the site and the site is not being marketed. Existing access is poor. | | |
| Smaller Villages, Hamlets and Open Countryside | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5/167 | Gatebeck | Fallbeck | ELA | 0.62 | Employment | LES | B1 abc, B2 | Mix Green / Brown | Vacant Land | Employment / Housing / Open Countryside | None | Hedgerow / Tree belt / Road / Walls | None | Flat level site | River / Part floodplain | None | Road | No access | None | Infilling | | Hydro / Biomass | No | No | Potential site for expansion to existing premises. Otherwise, demand and viability will be very limited. The site is not being openly marketed. | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Potential Sites | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Principal Service Centres | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| E23KJ | Kendal | Land north of Meadowbank | Allocations DPD | 5.33 | Employment | LES | B1, B2 | Agricultural | Agricultural | Employment / Housing / Open Countryside | None | Hedgerow / Walls | None | Undulating site | None | None | Pedestrian / Railway Station (near by) / Road / Bus Stops / Pavements | No access | Significant Impact from north and east | No - settlement extension | | Wind / Biomass | Residential | Landscaping /screening essential | Site is to the north of Shap Road Industrial Estate and would provide an extension to it. | Potential new access onto A6 required. Development in this location would potentially exacerbate existing congestion in north Kendal. | |
| EN28M | Kendal | Land at Shap Road Industrial Estate | Allocations DPD | 0.34 | Employment | LES | B1, B2, B8 | Brown | Vacant Land | Employment | None | Road | None | Flat level site | None | None | Pedestrian / Railway Station (near by) / Road / Bus Stops / Pavements | No access | None | Infilling | | Biomass | No | None | Small infill plot on established industrial estate. No obvious indication that the site is on the market and it might not be available. Access might be a potential constraint. | Limited vehicular access. Gas pipeline crossing northern edge of site? | |
| E33 | Kendal | Land at Boundary Bank | Allocations DPD | 0.93 | Employment | LES | B1, B2 | Agricultural | Agricultural | Employment / Open Countryside / Quarry / Household Waste | None | Tree belt / Walls | None | Plateau dropping slightly north to south. Boundary drops steeply to north (quarry) and east (household waste) | None | Adjacent household waste | None | No access | Negligible | No | | Wind / Biomass | No | None | Potential extension to established Kendal Fell Business Park. Check take-up with Pell & Co | Access appears to be an issue. | |

| Site Ref | Settlement | Address | Source | Size (ha) | Type | Type 2 | Proposed Uses | Classification | Existing Use | Surrounding Uses | Compatability | Existing Boundaries | Existing Natural and Built Features | Topographical Features | Evidence of Watercourses | Noise and Smells | Access to the Site | Access Through the Site | Likely Impact on Views | Infilling or Rounding Off | Appropriate Density | Renewable Energy Potential | Scope for Mixed or Other Uses | Need for Mitigation | Market Perspective | Other Comments | |
|--------------|------------|--|-----------------|-----------|---------------------|--------|---------------------------------|----------------|--|--|--|---|---|---|---|-------------------------|---|-------------------------------|---|---|--------------------------|----------------------------|-------------------------------|-----------------------------------|--|--|--|
| E4M | Kendal | Land at Scroggs Wood, Milthorpe Road | Allocations DPD | 17.90 | Employment | SES | B1 (bc), B2, B8 + ancillary B1a | Agricultural | Agricultural | Housing / Open Countryside | None | Tree belt / Walls | None | Undulating site falling north to south | Stream / River | None | Pedestrian / Road / Bus stops / Pavements | No access | Undulating impact from all directions | No - settlement extension | | Wind / Hydro / Biomass | Comprehensive mix of uses | Landscaping / screening essential | Major greenfield site offering potential for range of employment uses. The site benefits from A6 frontage and good access to the region's highway network. | Major access works, with new access onto A6 | |
| E31M | Kendal | Land south of K Shoes, Natland Road | Allocations DPD | 1.19 | Employment | LES | B1, B2, B8 | Agricultural | Agricultural | Employment / Open Countryside | None | Hedgerow / Tree belt / Walls | None | Relatively flat / slight undulation | None | None | Pedestrian / Road / Pavements | No access | Significant impact from south and west | No | | Hydro / Biomass | Residential | Landscaping / screening | Site is to the south of Riverside Business Park and would provide a suitable extension to it. | | |
| R97M | Kendal | Land south of Natland Beck Farm | Allocations DPD | 1.50 | Mixed | | B1, B2 | Agricultural | Agricultural | Housing / Open Countryside | None | Tree belt / Walls | None | Undulating site falling south to north | None | None | Pedestrian / Road | No access | Negligible | Infilling | | Biomass | Residential | | If development is suitable, residential would be more appropriate. | | |
| M2M | Kendal | Land east of Burton Road | Allocations DPD | 6.52 | Employment | B/SP | B1 abc | Agricultural | Agricultural | Housing | None | Hedgerow / Fencing / Rail line | None | Undulating. Steep bank down from A65 into site | None | Rail noise | Pedestrian / Road / Bus stops / Pavements | No access | Significant from all directions | No | | Biomass | Comprehensive mix of uses | Landscaping / screening | Major greenfield site offering potential for range of employment uses. The site benefits from A65 frontage and good access to the region's highway network. | Major access works, with new access onto A65 and major level change between it and site. | |
| | Kendal | Canal Head AAP | | | Mixed | | | | | | | | | | | | | | | | | | | | Significant town centre development opportunity. Potential for range of employment uses as part of area wide regeneration. | | |
| E30 | Ulverston | Land at Ulverston Canal Head | Allocations DPD | 6.40 | Employment | SES | B1 bc, B2, B8 + ancillary B1a | Agricultural | Agricultural | Housing / Open Countryside / Shopping / Rail | Agricultural Site in Open Countryside | | None | Flat level site. Earth mound at rail line. | Floodplain Standing water / Canal | None | Road / Bus stops | No access | Significant impact on views from Hoad Hill and A590 | Rounding off | Open Countryside | Wind / Biomass | None | Development brief | A Greenfield site, accessed via a country lane off A590. Part of Ulverston Canal Masterplan. Needs to be looked at with site M26. Could be of strategic employment significance. Flood plain issues. | link to site M26 - Phase 2. Included in Ulverston Canal Masterplan | |
| M26 & M26# | Ulverston | Land at Ulverston Canal Head | Allocations DPD | 6.40 | Employment | SES | B1 bc, B2, B8 + ancillary B1a | Agricultural | Agricultural | Employment / Housing / Open countryside / Shopping/ Rail | Agricultural Site in Open Countryside - litter from recycling facility | | Telephone wires at rail line | Flat level site. Earth mound at rail line. | Floodplain / Standing water / Canal | None | Road / Bus Stops | Footpath to west boundary | Significant impact on views from Hoad Hill and A590 | Rounding off | Open Countryside | Wind / Biomass / LEN | None | Development brief | A Greenfield site, accessed via a country lane off A590. Part of Ulverston Canal Masterplan. Needs to be looked at with site M30. Could be of strategic employment significance. Flood plain issues. | link to site E30 - Phase 1. Included in Ulverston Canal Masterplan | |
| M28 & M28# | Ulverston | Land at Ulverston Canal Head | Allocations DPD | 3.83 | Mixed | | Heritage, leisure, tourism | Brown | Employment / Retail/ Manufacturing / Cattle Market | Housing / Employment / Open countryside / Shopping | Poor amenity, dirty uses, scrap yard, old premises. Underused site. | | Road / Walls / Hedgerow / Tree belt / Fencing | Canal head is located at centre of the site | There is a slope down from A590, but generally a flat level site. | Floodplain / Canal head | Road traffic noise from A590 | Road / Bus stops / Pavements | Footpath north of canal | Significant impact on views from Hoad Hill and A590 | Rounding off | Heritage site | Biomass | Tourism / Hotel / Residential | Development brief | A historical employment site currently used for cattle auction & scrap - appears scruffy. Potential to realise an important local heritage scheme including employment, hotel and leisure. Ownership issues. Needs a revised masterplan? | Potential ownership constraints - availability? Multiple interests. Heritage/tourism potential to be realised. |
| MN31# | Ulverston | Includes and extends M28. Incorporates Booth's holding; Canal Head / rear of Booths, the petrol station & Lakes Glass Centre | Allocations DPD | 6.81 | Mixed | | | Brown | Employment / Retail / Petrol Filling Station / Manufacturing / Cattle Market | Housing / Employment / Open countryside / Shopping | Poor amenity, dirty uses, scrap yard, old premises. Underused site. | | Road / Walls / Hedgerow / Tree belt / Fencing | Canal head is located at centre of the site | There is a slope down from A590, but generally a flat level site. | Floodplain / Canal Head | Road traffic noise from A590 | Road / Bus stops / Pavements | Footpath north of canal | Significant impact on views from Hoad Hill and A590 | Rounding off | Heritage site | Biomaa | Tourism / Hotel / Residential | Development brief | Includes and extends M28 to include booths land holdings, petrol filling station and Lakes Glass Centre. | Potential ownership constraints - availability? Multiple interests. Heritage/tourism potential to be realised. |
| EN35M | Ulverston | Land at North Lonsdale Road | Allocations DPD | 3.10 | Employment | LES | B1 abc, B2, B8 | Brown | Vacant Land + Premises | Open countryside / Housing / Community Use / Employment | Poor amenity vacant site - amenity value would improve with use | Canal / fencing / Tree belt | Old buildings | Flat level site | Floodplain / Canal | Road traffic noise | Road / Bus Stops / Pavements | No access | Impact on housing facing the site | Infilling | Within settlement | Biomass / LEN | Residential | no | Flood risk significant - taken out | Former GCW Waite & Company Ltd, Agents: Peill & Co 0845 4504444) - Major deliverability issues relating to flood risk - discount | |
| R283M | Ulverston | Land south of Kennedy Street | Allocations DPD | 1.56 | Employment | LES | B1 abc, B2, B8 | Brown | Skills Training / Employment | Housing / Employment / Open Countryside | Poor amenity - old single storey construction, Glaxo neighbour. | Fencing / Tree belt | Old buildings | Flat level site | Floodplain / Canal / Surface water drainage issues | Noise from Glaxo | Road / Bus Stops / Pavement | No access | Impact on housing facing the site | Infilling | Within settlement | Biomass / LEN | Residential | boundary modification | Covered by Ulverston Canal Masterplan - keep as it is. Good for future employment, but small and bordered by Glaxo to east and residential uses to west. Will not significantly contribute to future employment. | Does Glaxo Smith Kline want this site? Western part used by GEN II Furness Skills Centre and eastern part used by Glaxo. Site suffers from surface water drainage issues. | |
| EN22 | Ulverston | Phase 1, Low Mill Tannery | Allocations DPD | 0.72 | Employment | LES | B1 abc, B2, B8 | Brown | Vacant site | Open Countryside / Employment | Poor amenity vacant site | Walls / Fencing / Road | None | Flat level site | Floodplain / Standing water / Canal | None | Road | No access | Impact on open countryside to north | Infilling | Adjoins open countryside | Wind / Biomass | None | None | A priority site. Need to realise regional investment here. | A development brief was preped for this site in September 1997. This site was brought forward by SLDC in partnership with former NWDA via ESF - should be prioritised for use. Same site as 5/106A dut differing site area. | |
| EN23 | Ulverston | Phase 3, Low Mill Tannery | Allocations DPD | 2.80 | Employment | LES | B1 abc, B2, B8 | Agricultural | Vacant Land | Open Countryside / Employment | Agricultural Site in Open Countryside | Walls / Fencing / Road | None | Flat level site | None | | Road | Footpath to southern boundary | Impact on surrounding open countryside | No | Adjoins open countryside | Wind / Biomass / LEN | Non | None | Not to be progressed unless Phase 1 occupied. | This site should only be considered following use of site 5/016A. This site is the same as ELA 5/0168 | |
| MN14# | Ulverston | Site off Morecambe Road / Sandside Road | Allocations DPD | 1.19 | Mixed or Employment | | | Agricultural | Agricultural | Employment / Open Countryside / Housing | None | Fencing / Hedgerow | None | Flat level site | None | None | Road | No access | Impact on open countryside | No | Adjoins open countryside | Wind / Biomass | None | None | A good potential extension to Low Mill Business Park in tandem with MN30. | New access to Morecambe Road required, but could also provide access to MN30 | |
| MN30# | Ulverston | Land East of site M14, off Morecambe Road / Sandside Road | Allocations DPD | 0.64 | Mixed or Employment | | | Agricultural | Agricultural | Employment / Open Countryside / Housing | None | Fencing / Hedgerow | None | Flat level site | None | None | Road | No access | Impact on open countryside | No | Adjoins open countryside | Wind / Biomass | None | None | A good potential extension to Low Mill Business Park. | New access to Morecambe Road required, but could also provide access to MN14 | |
| M11M & M11M# | Ulverston | Land at Lightburn Road | Allocations DPD | 3.99 | Employment or mixed | B/SP | B1 abc | Agricultural | Housing / Agricultural buildings | Employment/ Open Countryside/ Rail / Housing | None | Tree belt/ Road / Footpath / Walls / Hedgerow / Rail line | Trees / Walls / Farm buildings | Undulating site, falls north east to south west | None | The A590 is a busy road | Road / Bus stops / Rail / Pavement | Footpath to rear of housing | Impact on A590 and immediate neighbouring land | Rounding off | Adjoins open countryside | Wind / Biomass | Residential | Development brief | A potential business/science park - sloping/undulating topography and outside development boundary. Careful consideration required to mix of employment uses. | If developed may need it's own junction as A590 is a fast road | |
| E19# | Ulverston | Part of M11M, off the A590 | Allocations DPD | 3.10 | Mixed | | | Agricultural | Housing / Agricultural buildings | Employment / Open Countryside / Rail / Housing | None | Tree belt/ Road / Footpath / Walls / Hedgerow / Rail line | Trees / Walls / Farm buildings | Undulating site, falls north east to south west | None | The A590 is a busy road | Road / Bus stops / Rail / Pavement | Footpath to rear of housing | Impact on A590 and immediate neighbouring land | Rounding off | Adjoins open countryside | Wind / Biomass | Residential | Development brief | Central and eastern part of M11M. A potential business/science park - sloping/undulating topography and outside development boundary. | If developed may need it's own junction as A590 is a fast road | |

| Site Ref | Settlement | Address | Source | Size (ha) | Type | Type 2 | Proposed Uses | Classification | Existing Use | Surrounding Uses | Compatability | Existing Boundaries | Existing Natural and Built Features | Topographical Features | Evidence of Watercourses | Noise and Smells | Access to the Site | Access Through the Site | Likely Impact on Views | Infilling or Rounding Off | Appropriate Density | Renewable Energy Potential | Scope for Mixed or Other Uses | Need for Mitigation | Market Perspective | Other Comments | |
|----------------------|----------------------|--|-----------------|-----------|-----------------------------------|--------|---------------|-------------------|----------------------------------|---|---|---|---|---|-----------------------------|------------------------------|---|---|---|--|--------------------------------------|----------------------------|-------------------------------|-------------------------|---|--|--|
| MN6# | Ulverston | Part of M11M, off the A590 | Allocations DPD | 0.87 | Mixed | | | Agricultural | Housing / Agricultural buildings | Employment / Open Countryside / Rail / Housing | None | Tree belt/ Road / Footpath / Walls / Hedgerow / Rail line | Trees / Walls / Farm buildings | Undulating site, falls north east to south west | None | The A590 is a busy road | Road / Bus stops / Rail / Pavement | Footpath to rear of housing | Impact on A590 and immediate neighbouring land | Rounding off | Adjoins open countryside | Wind / Biomass | Residential | Development brief | Western part of M11M. A potential business/science park sloping/undulating topography and outside development boundary. Wrong side of Ulverston, is there demand for this much B1 in Ulverston? | If developed may need it's own junction as A590 is a fast road | |
| Key Service Centres | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| MN25M | Grange | Land at Allithwaite Road | Allocations DPD | 9.26 | Mixed | | B1 abc, B2 | Open Countryside | Agricultural | Housing / Open Countryside | good amenity, south facing aspect and estuary views | Road / Walls / Tree belt / Hedgerow / Footpath / Fencing | Trees / Hedgerow | Undulating site, falls north east to south west | None / Estuary view | Road traffic noise | Road / Bus stops / Rail / Pavement | No access | Significant impact on estuary to south west and B5277 | Rounding off | Adjoins open countryside | Wind / Biomass / LEN | Residential | Development brief | Assuming development of this site is acceptable, mixed use development with a majority of housing would seem appropriate. An element of employment might be appropriate on part of the site. | New access required onto B5277 Allithwaite Road. | |
| R350M | Grange | Land at Allithwaite Road | Allocations DPD | 1.10 | Mixed (50:50 housing: employment) | LES | B1 abc, B2 | Brown | Former Refuse site | Housing / Open Countryside | poor amenity due to refuse use | Road / Hedgerow / Tree belt | Trees | Flat level site | none | None | Road | No access | Impact on residential neighbours, but possible improvement on former refuse use | Rounding off | Adjoins open countryside | Wind / Biomass / LEN | Residential | None | A good future employment site for B1 or mixed use. Possible contamination from refuse use. | This site is ELA site ref: 5/168. An understanding of possible contamination from previous refuse use is required | |
| M378M | Grange | Berners Pool | Allocations DPD | 0.35 | Mixed | | B1 ab | Brown | Car park / Vacant land | Housing / Estuary | average amenity, vacant part has poor amenity | Road / Rail / Walls / Footpath / Tree belt | Walls / Rail line / Hard surfacing | Site slopes westward towards estuary | Estuary | Rail noise | Road / Bus Stops / Pavements | Footpath from Road to Rail line | Site is visible from the estuary | Infilling | Within settlement at edge of estuary | Biomass / LEN | Residential | development brief | Not a viable employment site. This site provides an asset in terms of car parking particularly in high season. Consider with R381 and R383. Possibly more suited to residential to capitalise on estuary view and location to Grange. | This site provides an asset in terms of car parking particularly in high season. Consider with R381 and R383 | |
| R383 | Grange | Berners Pool | Allocations DPD | 0.35 | Mixed | | B1 ab | Brown | Recreation | Rail / Estuary | average amenity | Rail /Road / Estuary / Tree belt | Swimming pool | Flat level site | Estuary | Rail noise | Road (difficult) / Footpath | Footpath along rail line | Significant impact as site visible from neighbouring land to east and estuary | Infilling | Within settlement at edge of estuary | Hydro / Wind / LEN | Leisure | development brief | consider with sites R381 and M378M. Tricky site - former lido. Not a suitable employment site. | consider with sites R381 and M378M | |
| R381 | Grange | Berners Pool | Allocations DPD | 0.35 | Mixed | | B1 ab | Brown | Vacant Land & Premises | Rail line/ Housing | average amenity | Road / Rail / Wall / Tree Belt | Existing vacant building of modern architecture | Site slopes westward towards estuary | Estuary | Rail noise | Road / Bus Stops / Pavements | Footpath at northern edge of site to footpath over rail bridge | Significant impact as site visible from neighbouring land to east and estuary | Infilling | Within settlement at edge of estuary | Hydro / Wind / LEN | Residential | development brief | consider with sites M378M and R383. Not convinced this is for employment due to viability issues, but a has potential for residential site | consider with sites M378M and R383 | |
| MN21 | Grange | Land at Kents Bank Road | Allocations DPD | 0.30 | Mixed | | B1 ab | Green | Churchyard | Housing / Shopping | high level of amenity | Road / Tree belt / Walls | Walled garden | Flat level site | None | Road traffic noise | Road / Bus stops / Pavements | None observed | Significant impact to surrounding housing and shopping area | Infilling | Within settlement | None | Residential | None | Not convinced this will make a significant employment contribution - a small site next to a church opposite a row of shops. | This site provides a pleasant green space at shopping centre | |
| EN34M | Grange | Land adjacent to Station Yard | Allocations DPD | 0.81 | Employment | LES | B1 abc, B2 | Brown | Vacant Land | Employment / Hotel / Housing | Poor amenity vacant site | Road / Walls / Tree belt / Fencing | Rail line / Wall | Flat level site, A590 at higher level | Partial Floodplain, Estuary | Road traffic noise from A590 | Road / Bus stops / Pavements | No access | Significant view from A590, Hotel and estuary | Infilling | Adjoins open countryside and Estuary | Hydro / Wind / LEN | Leisure | None | Bought by hotel to protect it's estuary views - no longer available for employment use. | Unavailable - site recently acquired by neighbouring hotel to protect estuary views | |
| R640 | Kirkby Lonsdale | Land east of Dodgson Croft | Allocations DPD | 0.41 | Employment | LES | B1 abc, B2 | Mix Green / Brown | Vacant Land | Housing / Open Space / Shopping | None | Tree belt / Fencing | None | Undulating | None | None | Pedestrian / Road / Bus Stops / Pavements | No access | None | Infilling | | Biomass | Residential | None | Small infill plot offering potential for various uses. Site benefits from A65 frontage. Residential proposals being advanced and availability for employment use is unlikely. | | |
| MN24 | Kirkby Lonsdale | Land west of Health Centre | Allocations DPD | 0.24 | Employment | LES | B1 abc | Green | Open Space | Employment / Housing / Open Space / Community Uses / Indoor Leisure | None | Tree belt / Walls | Trees | Slight undulation, fall to north of site | None | None | Pedestrian / Road / Bus Stops / Pavements | No access | Negligible | Infilling | | Biomass | No | None | Small infill plot offering potential for various uses, subject to site access. | | |
| R127M | Kirkby Lonsdale | Land north of Kendal Road | Allocations DPD | 1.70 | Mixed | | B1 abc, B2 | Agricultural | Agricultural | Housing / Open Space / Education / Open Countryside | None | Hedgerow / Tree belt / Fencing | None | Undulating, falls south to north | None | None | Pedestrian / Road / Pavements | No access | Significant from north, east and west | No | | Biomass | Comprehensive mix of uses | Landscaping / screening | Greenfield extension to the west of the town that could accommodate modern business premises, something that is currently absent from Kirby Lonsdale. | | |
| E13M | Milnthorpe | Land adjacent to Mainline Business Park (B6385) | Allocations DPD | 2.95 | Employment | LES | B2, B8 | Agricultural | Agricultural | Employment / Rail / Open Countryside | None | Hedgerow | None | Site appears fairly level | None | None | Road | No access | Potential impact from south and east | Rounding off | | Wind / Biomass | No | Landscaping / screening | Established site for B2 and B8 uses. Significant access / highway improvement costs to develop adjacent land and question whether better locations exist for new B2 and B8 development. | Significant access works from B6385 (Kendal Road) into site. | |
| M9M1 | Milnthorpe | Land adjacent to Bridge End Business Park, Park Road | Allocations DPD | 1.45 | Employment | LES | B1 abc, B2 | Agricultural | Agricultural | Employment / Housing / Open Countryside | None | Hedgerow / Walls | Trees | Slight undulation | None | None | Potential Ransom | No access | Impact on neighbouring propertues | Infilling | | Biomass | No | None | Serviced plots provided and available. Good site to meet local employment needs. | Access into site needs to be explored - potential ransom? | |
| Local Service Centre | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| MN19 | Broughton in Furness | Foxfield Road | Allocations DPD | 0.73 | Employment | LES | B1 ab, B2, B8 | Mix Green/Brown | Vacant Land and Employment | Housing /Open Countryside / Disused Quarry | Remote site with poor level of amenity | Disused rail line / Footpath / Tree belt / Fencing / Road | Trees and building on site | Flat level site | None | None | Road / Rail | No access | Negligible | No | Adjoins open countryside | Biomass / LEN | Residential | boundary modification | A site suitable for local employment use. Consider for live/work to cater for growth/knowledge/creative sectors. | Remote lacks nearby amenities. Local use only. Scope to extend boundary to north and bring forward a mixed use scheme. Possible live/work units. | |
| E32M & E32# | Burneside | Land adjacent to Cropper's Papermill | Allocations DPD | 1.18 | Employment | LES | B1 abc, B2 | Agricultural | Agricultural / Open Countryside | Employment / Housing / Open Countryside | None | Hedgerow / Tree belt / Fencing / Footpath | None | Unudlating site | None | None | Pedestrian / Road | Public Footpath | Negligible | Rounding off | | Wind / Biomass | No | None | Site is suitable for extension to adjoining paper mill. Otherwise, difficult to foresee demand for this site. | Potential extension to Croppers Paper Mill. | |
| MN14M | Burton in Kendal | Land adjacent to Clawthorpe Hall (off A6070) | Allocations DPD | 0.58 | Employment | LES | B1, B2 | Agricultural | Agricultural | Employment / Housing / Open Countryside | None | Hedgerow / Walls | None | Undulating site, falls east to west | None | M6 Road Noise | Road / Bus Stops | Road Lane - existing access through Clawthorpe Hall Business Centre | Significant from housing to south and east | No - extension of existing employment site | | Biomass | No | Landscaping / screening | Extension to established business centre. The site benefits from frontage to the A6070 and with local facilities in Burton in Kendal. | Extention to established rural employment site. | |
| EN14M | Burton in Kendal | Land at Green Dragon Farm (Tam Lane / Main Street) | Allocations DPD | 1.11 | Employment | LES | B1 abc, B2 | Agricultural | Agricultural | Housing / Open Countryside | None | Hedgerow / Tree belt / Walls | None | Undulating site, falls east to west | None | None | Road / Bus Stops | No access | limited impact from south and west | No | | Biomass | Residential | Landscaping / screening | If development is acceptable, this site is perhaps better suited to residential or mixed use development. | A new rural site. | |

| Site Ref | Settlement | Address | Source | Size (ha) | Type | Type 2 | Proposed Uses | Classification | Existing Use | Surrounding Uses | Compatibility | Existing Boundaries | Existing Natural and Built Features | Topographical Features | Evidence of Watercourses | Noise and Smells | Access to the Site | Access Through the Site | Likely Impact on Views | Infilling or Rounding Off | Appropriate Density | Renewable Energy Potential | Scope for Mixed or Other Uses | Need for Mitigation | Market Perspective | Other Comments | |
|--|---|---|-----------------|-----------|---------------------|--------|----------------|--|---|---|---|--|--|---|--------------------------|------------------------------|---|--|---|---|--------------------------|----------------------------|-------------------------------|------------------------------------|--|---|--|
| EN42 | Cark | Station Yard | Allocations DPD | 1.61 | Employment | LES | B1 abc, B2, B8 | Brown | Distribution / External storage | Housing / Open Countryside / Rail | Poor amenity, dirty uses, old premises. | Watercourse / Walls / Fencing / Road / Rail Line / Tree belt | River / Rail Station/ Buildings | Flat level site | River / Floodplain | Rail noise | Road / Rail | No access | Limited impact - obscured site | Infilling | Adjoins open countryside | Biomass / LEN | None | development brief | A good local employment site, well occupied, perhaps a little underutilised and scruffy - tucked away behind station. May be improved with some landscape works. | Current occupiers include W.F. Wilkinson & Son Approved Coal Merchants,, The Furness & South Cumberland Supply Association, South Lakeland Paints, Cabana Soft Drinks on Draught. | |
| M41M | Endmoor | Land north of Sycamore Close | Allocations DPD | 1.00 | Employment | LES | B1, B2 | Agricultural | Agricultural | Housing / Open Countryside | Adjoining housing - suitability for B2 | Walls | None | Undulating fields | None | None | Pedestrian / Road / Bus stops / Pavements | No access | Significant impact on views from open countryside to north, east and west and existing housing to south | Rounding off | Adjoins open countryside | Biomass | Tourism / Residential | Additional landscaping / screening | if development is acceptable, this site is perhaps better suited to residential development. | Potential for small scale (B1) employment as part of mixed use development. | |
| EN59# | Endmoor | Land at Endmoor Plantation, south of Gatebeck Lane, West of Gilpin Tarn | Allocations DPD | 16.56 | Employment | | | Agricultural | Agricultural | Housing / Open Countryside | Adjoining housing - suitability for B2 | Walls | None | Undulating fields | None | None | Pedestrian / Road / Bus stops / Pavements | No access | Significant impact on views from open countryside to north, east and west and existing housing to north and south | Settlement extension (merging of Endmoor and Summerlands) | Adjoins open countryside | Biomass | Tourism / Residential | Additional landscaping / screening | if development is acceptable, this site is perhaps better suited to residential development. | Potential for small scale (B1) employment as part of mixed use development. | |
| EN25 | Flookburgh | Moor Lane | Allocations DPD | 1.10 | Employment | | B1 abc, and B2 | Agricultural | Open Countryside | Employment/ Open Countryside | None | Road / Fencing | None | Flat level site | Floodplain | None | Road | No access | Views from surrounding open countryside | No | Adjoins open countryside | Wind / Biomass / LEN | None | None | A greenfield site adjacent to an existing popular business park. A useful extension site for local employment use - protect for future employment. | None. This site is ELA site ref: 5/017 | |
| E18M | Holme | Land at Elmsfield Park | Allocations DPD | 3.03 | Employment | LES | B2, B8 | Agricultural | Agricultural | Employment / Open Countryside / Other - old persons home | None | Hedgerow | None | Fairly flat level site | None | None | Road / Bus Stops | Road / Lane - existing access through Elmsfield Park | Minimal | No - extension of existing employment site | | Wind / Biomass | No | Landscaping / screening | Extension to established business park. The site benefits from frontage to the B6384 | Extension to established rural employment site. | |
| M35M | Holme | Land at Milnthorpe Road | Allocations DPD | 2.58 | Employment | LES | B1 abc, B2 | Agricultural | Agricultural | Housing / Open Space / Rail / Open Countryside | None | Hedgerow / Fencing | Pylons | Flat level site | None | None | Pedestrian / Road / Sus Stops / Pavements | No access | Significant from north, east and south | No | | Wind / Biomass | No | Landscaping / screening | Extension to Elmsfield Park make greater commercial sense and demand for employment in this location doesn't justify development of E18M and M35M. | A new rural site. | |
| RN121M | Levens | Land opposite Lane End Farm | Allocations DPD | 0.47 | Employment | LES | B1 bc, B2 | Re-use of buildings / Brown | Existing shed | Housing / Open Countryside | None | Hedgerow / Tree belt/ Walls | None | Steep bank (east to west) along eastern boundary - existing access drops down bank, otherwise flat site | None | None | Pedestrian / Road / Bus stops | No access | None | Infilling | | Biomass | Residential | None | if development is acceptable, this site is perhaps better suited to residential development. | Poor access - steep road into site. | |
| M683sM | Sandside | Land North of Yans Lane | Allocations DPD | 1.64 | Mixed | | B1 bc, B2 | Re-use of buildings / Agricultural | Agricultural / Employment | Employment / Housing / Open Countryside / Other - builders merchant | None | Hedgerow / Walls | None | Flat level site | None | None | Private lane to site | Existing lane off Storth Road | Negligible | Re-use / redevelopment of existing buildings | | Biomass | No | None | A number of existing businesses occupy the site and the site is not being marketed. Existing access is poor. | Rural site without road frontage. Potential highways improvements to access site. | |
| Smaller Villages, Hamlets and Open Countryside | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| RN16M | Crooklands | Land at Peasey Bridge | Allocations DPD | 0.66 | Employment | LES | B1, B2, B8 | Re-use of buildings / Brown | Coach Depot | Employment / Open Countryside / Tourism | Adjoining hotel and caravan park - suitability for B2 | Hedgerow / Tree belt / Walls / Watercourse | None | Flat level site | River | None | Pedestrian / Road / Bus stops / Pavements | No access | Very limited | Infilling | | Hydro / Biomass | Tourism / Residential | No | Site is in use. Demand and viability for employment development likely to be very limited. Better locations and sites exist. | Availability needs to be checked - site used as a coach depot. | |
| E15M | Heversham & Leasgill | Land at Prince's Way | Allocations DPD | 0.24 | Employment | LES | B1, B2 | Agricultural | Agricultural | Employment / Housing / Open Countryside | None | Tree belt / Fencing | None | Flat level site | None | None | Road / Bus Stops / Pavements | No access | Limited impact from neighbouring properties | Infilling | | Biomass | Residential | Landscaping / screening | This site sits to the rear of a small number of existing business and trade counter units fronting the A6. Demand and viability for employment development likely to be very limited. Better locations and sites exist. | | |
| EN57# | Heversham & Leasgill | North part of site E15, off Princes Way | Allocations DPD | 0.17 | Employment | | | | | | | | | | | | | | | | | | | | | | |
| EN43 | Hincaster | Land at Greenside Farm | Allocations DPD | 0.86 | Employment | LES | B1, B2 | Agricultural | Agricultural | Housing / Open Countryside | Remote site with poor accessibility and no amenity | Hedgerow / Fencing / Road | Trees / Farm buildings | Slight fall west to east | None | None | Road / Bus Stop | No access | Negligible | Rounding off | Open countryside | Biomass | No | No | Very difficult to foresee market for employment. | Suggest discount. Remote site with poor accessibility and no local amenities. | |
| EN33# | Gatebeck | Land at Gatebeck Road | Allocations DPD | 4.04 | Employment or mixed | | | Agriultural | Agricultural | Open countryside | Remote site | Tree belt / Hedgerow / Fencing | Trees / farm buildings / pond | Fairly flat level site | Pond | None | Road | Existing lane off Gatebeck Lane | Significant impact on open countryside and views into site | No | Open Countryside | Wind / Biomass | No | Landscaping / screening | Site is fairly near to existing Fallbeck employment site, but extension to Fallbeck would appear more logical than development of this site | Suggest discount. Remote site with poor accessibility and no local amenities. | |
| RN151M | Open Countryside (near Holme Mills) | Land at Holme Mills, Station Road, Holme | Allocations DPD | 0.94 | Employment | LES | B1, B2, B8 | Agricultural | Agricultural | Employment / Housing / Open Countryside | None | Hedgerow / Walls | None | Undulating site, falls east to west | None | None | Road | No access | Significant from south and west and from residential properties to the north | No | | Wind / Biomass | No | Landscaping / screening | Site adjoins existing employment at Holme Mills. However, access to this site is poor and better employment sites exist in the near vicinity. | Extension to established rural employment site. Access is limited via a country lane. | |
| EN10 | Open Countryside (near Levens) | Land at Gilpin's Bridge | Allocations DPD | 0.62 | Employment | LES | B1, B2, B8 | Brown | Car park / vehicle storage for PD Dobson Car Showroom | Employment / Housing / Car Sales / PFS / Car Servicing | None | Hedgerow / Watercourse | Trees / Old structure (possible weighbridge) | Flat level site | River | Road traffic noise from A590 | Road | No access | None | No | | Wind / Hydro / Biomass | No | No | Site appears to be used for car parking associated with adjoining car showroom. Better locations exist for employment development. | Availability needs to be checked - site used for car parking and vehicle storage by adjoining car showroom. | |
| EN11 | Open Countryside (near Levens) | Land at Gilpin's Bridge | Allocations DPD | 0.26 | Employment | LES | B1, B2, B8 | Re-use of buildings / Brown | Employment / JCB storage / housing | Employment / Housing / Car Sales / PFS / Car Servicing | None | Hedgerow / Road / Watercourse | None | Flat level site | River / Floodplain | Road traffic noise from A590 | Road | No access | None | Infilling | | Hydro / Biomass | No | No | Site is in existing employment use. Difficult to foresee significant demand for site if existing use ceases. | Availability needs to be checked - site used for JCB storage and existing office / house. | |
| EN17M | Open Countryside (near Milnthorpe/Sandside) | Land adjacent to Dallam Timber Yard, Park Road | Allocations DPD | 0.38 | Employment | LES | B1 bc, B2 | Re-use of buildings (difficult to ascertain past use, but probably agricultural) | Other - redundant buildings | Employment / Housing / Open Countryside | None | Tree belt / Walls | Redundant buildings (poss pre 20th century) | Flat level site | River / Floodplan | None | Pedestrian / Road / Bus Stops / Pavements | Existing lane off B6385 | None | Re-use / redevelopment of existing buildings | | Biomass | No | None | The Dallam Tower Estate has provided a small range of employment and storage space has been created from converted buildings, which is well occupied. The land adjacent to Dallam Yard would compliment this existing offer and appears suitable for such use. | | |

| Site Ref | Settlement | Address | Source | Size (ha) | Type | Type 2 | Proposed Uses | Classification | Existing Use | Surrounding Uses | Compatability | Existing Boundaries | Existing Natural and Built Features | Topographical Features | Evidence of Watercourses | Noise and Smells | Access to the Site | Access Through the Site | Likely Impact on Views | Infilling or Rounding Off | Appropriate Density | Renewable Energy Potential | Scope for Mixed or Other Uses | Need for Mitigation | Market Perspective | Other Comments | |
|-------------|---------------------------|---|-------------------------------------|-----------|------------|--------|---------------|--|----------------------|-------------------------------|---------------------------------------|---------------------------------------|-------------------------------------|---|--------------------------|--|----------------------------|-------------------------|---|---------------------------|---------------------|----------------------------|------------------------------------|------------------------------------|---|---|--|
| E50# | Sedgwick & Brettargh Holt | Near Sedgwick, Brettargh Holt Roundabout, off A591/ A590 or A6 | Allocations DPD | 11.28 | Mixed | | | Agricultural | Agricultural / House | Open Countryside / Housing | Agricultural site in open countryside | Trees / Hedgerow | None | Slightly undulating site | None | Road traffic noise from A590 / A6 | Road / Bus Stop | No access | Significant impact from all directions | No | Open Countryside | Wind / Biomass | No | Landscaping / screening | Where will the demand stem from? Strategic sites, business parks and local employments sites would all be better related to existing Principal and Key Service service centres. | A new rural site, albeit with good road access. New junction with A590 would be required. Suggest discount - better site exist in or adjoining principal and key service centres. | |
| E51# | Sedgwick & Brettargh Holt | Near Sedgwick, Brettargh Holt Roundabout, off A591/ A590 or A6 | Allocations DPD | 8.07 | Mixed | | | Agricultural | Agricultural | Open Countryside / Housing | Agricultural site in open countryside | Fencing / Trees / Hedgerow | Trees | Fairly flat level site | None | Road traffic noise from A590 | Road / Bus Stop | No access | Significant impact from all directions | No | Open Countryside | Wind / Biomass | No | Landscaping / screening | Where will the demand stem from? Strategic sites, business parks and local employments sites would all be better related to existing Principal and Key Service service centres. | A new rural site, albeit with good road access. New junction with A590 would be required. Suggest discount - better site exist in or adjoining principal and key service centres. | |
| Other Sites | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| EN18# | Junction 36 M6 | Junction 36 M6 - south east quadrant | Allocations DPD - discounted option | 10.14 | Employment | | Auction Mart | Site under construction - no further consideration necessary | | | | | | | | | | | | | | | | | | | |
| E57# | Junction 36 M6 | Junction 36 M6 - south east quadrant | Allocations DPD - discounted option | 8.98 | Employment | | | Agricultural | Agricultural | Employment / Open Countryside | Agricultural site in open countryside | Hedgerow / Fencing / Road / Tree Belt | None | Undulating fields with hedgerows | None | Road traffic noise from M6 & A65 | Potential access off A6070 | No access | Significant impact from south and east | No | Open countryside | Wind / Biomass | Motorway services / hotel | Additional landscaping / screening | Where will the demand stem from? M6 Junctions to the south and north offer better locations for distribution. Strategic sites, business parks and local employments sites would all be better related to existing service centres. | Potential major earthworks - particularly for B2 / B8 uses. New access onto A6070. | |
| E56# | Junction 36 M6 | Junction 36 M6 - south west quadrant | Allocations DPD - discounted option | 4.91 | Employment | | | Agricultural | Agricultural | Open Countryside | Agricultural site in open countryside | Hedgerow / Fencing / Road / Tree Belt | None | Slightly undulating site, sloping up towards the M6 | None | Road traffic noise from M6 & A590 | Road | No access | Significant impact from west | No | Open countryside | Wind / Biomass | Motorway services / Hotel | Additional landscaping / screening | Where will the demand stem from? M6 Junctions to the south and north offer better locations for distribution. Strategic sites, business parks and local employments sites would all be better related to existing service centres. | E57 appears to offer better existing access to trunk road network and Junction 36. | |
| E58# | Junction 36 M6 | Junction 36 M6 - north east quadrant | Allocations DPD - discounted option | 1.33 | Employment | | | Agricultural | Agricultural | Open Countryside / Tourism | Agricultural site in open countryside | Wall / Hedgerow / Road / Tree Belt | None | Fairly flat level site | None | Road traffic noise from M6 & A65 | Potential access off A65 | No access | Significant impact from south and east | No | Open countryside | Wind / Biomass | Tourism / Motorway Service / Hotel | Additional landscaping / screening | Adjacent to M7. Where will the demand stem from? M6 Junctions to the south and north offer better locations for distribution. Strategic sites, business parks and local employments sites would all be better related to existing service centres. | Impact on adjoining holiday park. New access off A65. | |
| M7# | Junction 36 M6 | Junction 36 M6 - north east quadrant | Allocations DPD - discounted option | 5.34 | Employment | | | Agricultural | Agricultural | Employment / Open Countryside | Agricultural site in open countryside | Hedgerow / Fencing / Road / Tree Belt | None | A590 | None | Road traffic noise from M6, A590 & A65 | Potential access off A65 | No access | Significant impact from adjoining holiday park and east | No | Open countryside | Wind / Biomass | Tourism / Motorway Service / Hotel | Additional landscaping / screening | Adjacent to e58. Where will the demand stem from? M6 Junctions to the south and north offer better locations for distribution. Strategic sites, business parks and local employments sites would all be better related to existing service centres. | Access off the A65 might be difficult without combined development with E58. Impact on adjoining holiday park. | |
| E61# | Junction 36 M6 | Deeethwaite. Bordered by A591, B6385 & lane to Heversham / Leasgill | Allocations DPD - discounted option | 1.42 | Mixed | | | Agricultural | Agricultural | Open Countryside / Nursery | Agricultural site in open countryside | Hedgerow / Fencing / Road / Tree Belt | None | Undulating fields with hedgerows | None | Road traffic noise from A590 | Road | No access | Significant impact from north and west | No | Open countryside | Wind / Biomass | No | Additional landscaping / screening | Adjacent to e62. Where will the demand stem from? Strategic sites, business parks and local employments sites would all be better related to existing Principal and Key Service service centres. | A new rural site. Suggest discount - better site exist in or adjoining principal and key service centres. | |
| E62# | Junction 36 M6 | Deeethwaite. Bordered by A591, B6385 & lane to Heversham / Leasgill | Allocations DPD - discounted option | 8.20 | Mixed | | | Agricultural | Agricultural | Open Countryside / Nursery | Agricultural site in open countryside | Hedgerow / Road / Tree Belt | None | Undulating fields with hedgerows | None | Road traffic noise from A590 | Road | No access | Significant impact from north and west | No | Open countryside | Wind / Biomass | No | Additional landscaping / screening | Adjacent to e61. Where will the demand stem from? Strategic sites, business parks and local employments sites would all be better related to existing Principal and Key Service service centres. | A new rural site. Suggest discount - better site exist in or adjoining principal and key service centres. | |



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APPENDIX 2

Traffic Light Assessment

| Site Ref | Source | Settlement | Address | Size (ha) | Type | Type 2 | Suitable Uses |
|----------------------------------|-------------------------|----------------------|--|-----------|------------------------|--------|----------------------------|
| Principal Service Centres | | | | | | | |
| E23K# | Allocations DPD | Kendal | Land north of Meadowbank | 5.33 | Employment | | B1, B2 |
| EN28M (& 5/002) | Allocations DPD (& ELA) | Kendal | Land at Shap Road Industrial Estate | 0.34 | Employment | LES | B1, B2, B8 |
| E33 (& 5/278) | Allocations DPD (& ELA) | Kendal | Land at Boundary Bank | 0.93 | Employment | LES | B1, B2, B8 |
| E4M | Allocations DPD | Kendal | Land at Scroggs Wood, Milthorpe Road | 17.90 | Employment | SES | B1, B2, B8 |
| E31M | Allocations DPD | Kendal | Land south of K Shoes, Natland Road | 1.19 | Employment | LES | B2, B8 |
| 5/204 | ELA | Kendal | Riverside Business Park, Natland Road | 0.29 | | | B1, B8 |
| R97M | Allocations DPD | Kendal | Land south of Natland Beck Farm | 1.50 | Mixed | | B1, B2 |
| M2M | Allocations DPD | Kendal | Land east of Burton Road | 6.52 | Employment | B/SP | B1 |
| | | Kendal | Canal Head AAP | | Mixed | | B1 |
| 5/073 | ELA | Kendal | Shenstone House, Back Lane | 2.20 | | | |
| E30 | Allocations DPD | Ulverston | Land at Ulverston Canal Head | 6.40 | Employment | SES | B1, B2, B8 |
| M26 & M26# | Allocations DPD | Ulverston | Land at Ulverston Canal Head | 6.40 | Employment | SES | B1, B2, B8 |
| M28 & M28# | Allocations DPD | Ulverston | Land at Ulverston Canal Head | 2.00 | Mixed | | Heritage, leisure, tourism |
| MN31# | Allocations DPD | Ulverston | Includes and extends M28. Incorporates Booth's holding; Canal Head / rear of Booths, the petrol station & Lakes Glass Centre | 6.81 | Mixed | | B1, B2, B8 |
| EN35M | Allocations DPD | Ulverston | Land at North Lonsdale Road | 3.10 | Employment | LES | |
| R283M | Allocations DPD | Ulverston | Land south of Kennedy Street | 1.56 | Employment | LES | B1, B2, B8 |
| EN22 & 5/016A | Allocations DPD | Ulverston | Phase 1, Low Mill Tannery | 0.72 | Employment | LES | B2, B8 |
| EN23 & 5/016B | ELA | Ulverston | Phase 3, Low Mill Tannery | 2.8 | Employment | LES | |
| MN14# | Allocations DPD | Ulverston | Site off Morecambe Road / Sandside Road | 1.19 | Mixed or Employment | | B2, B8 |
| MN30# | Allocations DPD | Ulverston | Land East of site M14, off Morecambe Road / Sandside Road | 0.64 | Mixed or Employment | | B2, B8 |
| M11M & M11M# | Allocations DPD | Ulverston | Land at Lightburn Road | 3.99 | Employment | B/SP | B1 |
| E19# | Allocations DPD | Ulverston | Part of M11M, off the A590 | 3.10 | Mixed | | B1 |
| MN6# | Allocations DPD | Ulverston | Part of M11M, off the A590 | 0.87 | Mixed | | B1 |
| Key Service Centre | | | | | | | |
| MN25M | Allocations DPD | Grange | Land at Allithwaite Road | 9.26 | Mixed | | B1 |
| 5/168 | ELA | Grange | Land at Allithwaite Road (Former refuse site) | 1.10 | Employment | LES | B1 |
| M378M | Allocations DPD | Grange | Berners Pool | 0.35 | Mixed | | B1 |
| R383 | Allocations DPD | Grange | Berners Pool | 0.35 | Mixed | | B1 |
| R381 | Allocations DPD | Grange | Berners Pool | 0.35 | Mixed | | B1 |
| MN21 | Allocations DPD | Grange | Land at Kents Bank Road | 0.30 | Mixed | | |
| EN34M | Allocations DPD | Grange | Land adjacent to Station Yard | 0.81 | Employment | LES | |
| R640 | Allocations DPD | Kirkby Lonsdale | Land east of Dodgson Croft | 0.41 | Employment | LES | B1, B2 |
| MN24 | Allocations DPD | Kirkby Lonsdale | Land west of Health Centre | 0.24 | Employment | LES | B1 |
| R127M | Allocations DPD | Kirkby Lonsdale | Land north of Kendal Road | 1.70 | Mixed | | B1, B2, B8 |
| E13M | Allocations DPD | Milnthorpe | Land adjacent to Mainline Business Park (B6385) | 2.95 | Employment | LES | B2, B8 |
| M9M1 (& 5/171) | Allocations DPD (& ELA) | Milnthorpe | Land adjacent to Bridge End Business Park, Park Road | 1.45 | Employment | LES | B1, B2 |
| Local Service Centres | | | | | | | |
| MN19 | Allocations DPD | Broughton in Furness | Foxfield Road | 0.73 | Employment | LES | B1, B2, B8 |
| E32M & E32# | Allocations DPD | Burneside | Land adjacent to Cropper's Papermill | 3.61 | Employment | LES | B1, B2 |
| MN14M | Allocations DPD | Burton in Kendal | Land adjacent to Clawthorpe Hall (off A6070) | 0.58 | Employment | LES | B1 |
| 5/211 | ELA | Burton in Kendal | Land adjacent to Clawthorpe Hall (off A6070) | 0.54 | | | B1 |
| EN14M | Allocations DPD | Burton in Kendal | Land at Green Dragon Farm (Tam Lane / Main Street) | 1.11 | Employment | LES | B1, B2 |
| M41M | Allocations DPD | Endmoor | Land north of Sycamore Close | 1.00 | Employment | LES | B1, B2 |
| EN59# | Allocations DPD | Endmoor | Land at Endmoor Plantation, south of Gatebeck Lane, West of Gilpin Tarn | 16.56 | Employment | | |
| EN42 | Allocations DPD | Cark | Station Yard | 1.61 | Employment | LES | B1, B2, B8 |
| 5/017 | ELA | Flookburgh | Moor Lane | 1.10 | Employment | | B1, B2, B8 |
| E18M | Allocations DPD | Holme | Land at Elmsfield Park | 3.03 | Employment | LES | B2, B8 |
| M35M | Allocations DPD | Holme | Land at Milnthorpe Road | 2.58 | Employment | LES | B1, B2 |
| RN121M | Allocations DPD | Levens | Land opposite Lane End Farm | 0.47 | Employment | LES | B1, B2 |
| M683sM | Allocations DPD | Sandside | Land North of Yans Lane | 1.64 | Mixed | | B1, B2 |

| Site Ref | Source | Settlement | Address | Size (ha) | Type | Type 2 | Suitable Uses |
|--|-----------------|---|---|-----------|---------------------|--------|---------------|
| Principal Service Centres | | | | | | | |
| 5/009 | ELA | Storth | Quarry Lane | 1.20 | | | B1 |
| Smaller Villages, Hamlets and Open Countryside | | | | | | | |
| RN16M | Allocations DPD | Crooklands | Land at Peasey Bridge | 0.66 | Employment | LES | B1, B2, B8 |
| 5/167 | ELA | Gatebeck | Fallbeck | 0.62 | | | B1, B2 |
| EN33# | Allocations DPD | Gatebeck | Land at Gatebeck Road | 4.04 | Employment or mixed | | |
| E15M | Allocations DPD | Heversham & Leasgill | Land at Prince's Way | 0.24 | Employment | LES | B1, B2 |
| EN57# | Allocations DPD | Heversham & Leasgill | North part of site E15, off Princes Way | 0.17 | Employment | | |
| EN43 | Allocations DPD | Hincaster | Land at Greenside Farm | 0.86 | Employment | LES | |
| EN10 | Allocations DPD | Open Countryside (near Levens) | Land at Gilpin's Bridge | 0.62 | Employment | LES | B1, B2, B8 |
| EN11 | Allocations DPD | Open Countryside (near Levens) | Land at Gilpin's Bridge | 0.26 | Employment | LES | B1, B2, B8 |
| EN17M | Allocations DPD | Open Countryside (near Milnthorpe/Sandside) | Land adjacent to Dallam Timber Yard, Park Road | 0.38 | Employment | LES | B1, B2 |
| RN151M | Allocations DPD | Open Countryside (Holme Mills) | Land at Holme Mills, Station Road, Holme | 0.94 | Employment | LES | B1, B2, B8 |
| E50# | Allocations DPD | Sedgwick & Brettargh Holt | Near Sedgwick, Brettargh Holt Roundabout, off A591/ A590 or A6 | 11.28 | Mixed | | |
| E51# | Allocations DPD | Sedgwick & Brettargh Holt | Near Sedgwick, Brettargh Holt Roundabout, off A591/ A590 or A6 | 8.07 | Mixed | | |
| | | | | | | | |
| EN18# | Allocations DPD | Junction 36 M6 | Junction 36 M6 - south east quadrant | 10.14 | Employment | | Auction Mart |
| E57# | Allocations DPD | Junction 36 M6 | Junction 36 M6 - south east quadrant | 8.98 | Employment | | |
| E56# | Allocations DPD | Junction 36 M6 | Junction 36 M6 - south west quadrant | 4.91 | Employment | | |
| E58# | Allocations DPD | Junction 36 M6 | Junction 36 M6 - north east quadrant | 1.33 | Employment | | |
| M7# | Allocations DPD | Junction 36 M6 | Junction 36 M6 - north east quadrant | 5.34 | Employment | | |
| E61# | Allocations DPD | Junction 36 M6 | Deepthwaite. Bordered by A591, B6385 & lane to Heversham / Leasgill | 1.42 | Mixed | | |
| E62# | Allocations DPD | Junction 36 M6 | Deepthwaite. Bordered by A591, B6385 & lane to Heversham / Leasgill | 8.20 | Mixed | | |

| |
|---|
| Attractive sites to the market with limited constraints |
| Attractive sites with constraints or fairly attractive sites with limited constraints |
| Sites that are less attractive to the market and / or suffer from major constraints |

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