

Hayle

Town Framework Plan

(Background Evidence)

Review of Employment Sites

May 2010

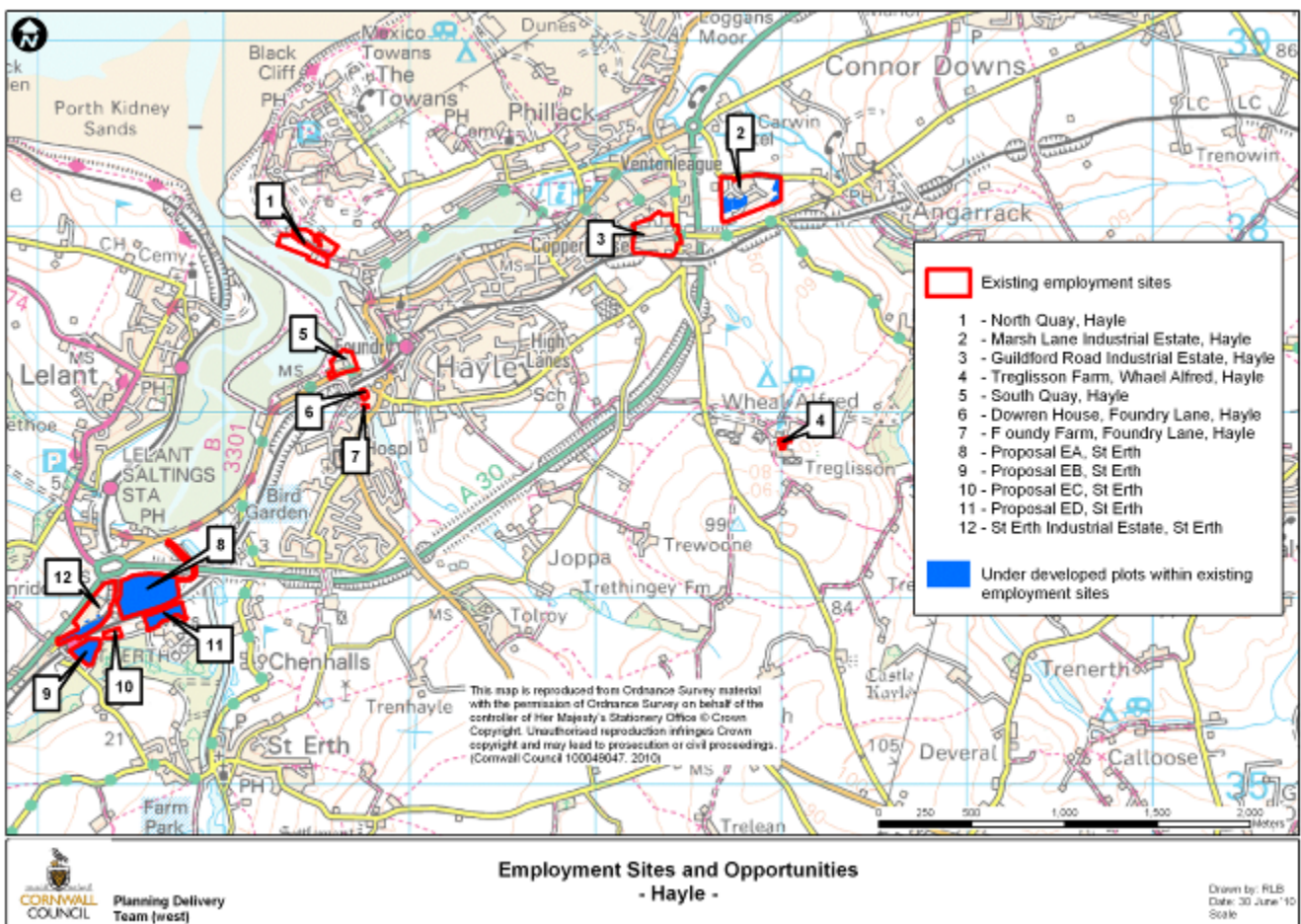
1 Introduction

This short paper reviews the employment sites within the Hayle area as set out in the Employment Land Review. This is being done as a starting point for plan making consideration within the process of developing a Town Framework Plan.

The paper provides a background to the employment land in the area and contains extracts from the Employment Land Review of the sites identified within Hayle (**see Appendix 1**). It also contains a table of the sites and a corresponding map identifying all sites which can be referred to.

The purpose of this paper is to highlight the following:

- Land identified in the Employment Land Review within the Hayle area.
- The amount of vacant and available land
- The appropriate scale of development that could be accommodated



2 Background to Employment in Hayle

The Hayle Community Network profile showed that in 2007 the population of Hayle was **7,559**. The wider Community Network Area (CNA) had a population of **25,700**.

The most prevalent employment sectors in the CNA are **Wholesale/Retail, Hotels and Catering, and the Service industry**. The percentage of the working age population claiming Job Seekers Allowance in the Penzance and Isle of Scilly Travel to Work Area is **3.1%** (or 1,167 claimants) which is below the England average of 4.3% (February 2010 Claimant Count figures - Nomis). *Note: the claimant count refers to claimants on job seekers allowance only and does not include the entire working age population who are unemployed (all economically active who are not employed).*

For the same period (October 2008 - September 2009) the number of people classified as employed was 77.3% (31,000) and the number classified as unemployed as 6.4% (2,000 people) (February 2010 Claimant Count figures - Nomis). In Hayle for the same period the number of people claiming job seekers allowance was 135 (6.75% of the TTWA's total) compared with the total of 7,700 for the Cornwall Unitary Authority area (Dept for Works and Pensions: Work and Pensions Longitudinal Study, August 2009)

The 2001 census showed that: 39.4% of the population of Hayle were in full time employment while a further 15.6% were engaged in part-time employment. 4.3% were classified as unemployed (estimate of people who are considered economically active but not employed).

In December 2007 Amion Consulting produced an Employment Space Assessment for Cornwall County Council and the six district councils which included assessments for the former Penwith and Isles of Scilly Travel to Work Area (now superceded in name only by the Penzance and Isles of Scilly TTWA). This study covered the period 2007 to 2017 and used a number of growth scenarios. (2.8%, 3.2% and an aspirational scenario of 3.8%).

The aspirational scenario was based on the assumption that by 2026 a GVA per capita target of 80% of the UK average will be reached for Cornwall and the Isles of Scilly, representing a growth rate of 3.7% pa.

The study forecast for the Penzance and Isle of Scilly TTWA, that between 2007 and the end date of 2017 that employment related to: B1 a/b uses will grow by 707 jobs under the 2.8% scenario; 860 jobs under the 3.2% scenario and 1,030 jobs under the aspirational scenario. There is also expected to be an increase in B8 related employment under each growth scenario, with an increase in 61 jobs under the 2.8 scenario, 63 jobs under the 3.2% scenario and 231 under the aspirational scenario. B2/B1c related employment is projected to grow by 67 jobs under both the 2.8% and 3.2% scenarios but this is estimated to grow to 231 jobs under the aspirational 3.8% scenario.

Overall the study demonstrated that the demand for employment space within the Penzance and Isles of Scilly TTWA is forecast to increase by: 19,921 sq m under the 2.8% scenario; 22,896 sq m under the 3.2% scenario and by 40,908 sq m under the aspirational scenario.

The Amion study also forecast the net change in demand for employment land in the Penzance and Isles of Scilly TTWA from 2007 to 2017. Under each of the growth scenarios the demand for employment land is projected to grow, ranging from 3.1 ha for B2/B1c under the aspirational scenario to 1.5 ha under the 2.8% scenario. Demand for B1a/b and B8 employment is also expected to increase and overall demand is forecast to grow from between 5.4 ha and 1.3 ha respectively under the 2.8% scenario, and 7.8 ha and 5.0 ha respectively under the aspirational scenario (Source: ESSA technical Report; Table 4.8). Further analysis and details can be read in the full Amion study.

Table 1: Summary of Amion Study for Penwith and Isles of Scilly TTWA

	Employment Growth - 2007-17			Floorspace Growth - 2007-17 (sqm)		
	2.8%	3.2%	Aspirational (3.7%)	2.8%	3.2%	Aspirational (3.7%)
B1a/b	707	860	1,030	13,439	16,334	19,576
B1c/B2	67	67	191	3,417	3,417	9,770
B8	61	63	231	3,065	3,145	11,562
TOTAL	835	990	1,452	19,921	22,896	40,908

Source: ESSA technical Report; Table 4.3 where job figures relating to floorspace is calculated using the ESSA assumptions of: 19 sq m per worker (B1a); 51 sq m per worker (B1c/B2); and 50 sq m per worker (B8).

3 Summary of Employment Sites

Table 2 below sets out the sites identified in the Employment Land Review and sets out for each site:

- Size of the site
- Size of developed vacant area (this includes vacant properties such as empty industrial units)
- Size of undeveloped vacant area (this includes vacant land including buildings under construction)
- Quality of the site (this is an average of the 6 different quality scores for each site)

- Accessibility by public transport (distance to railway station measured along most direct road/path, where convenient route could be identified)
- Accessibility to the main road network (distance to main A39)
- Development constraints
- Overall Employment Land Review score (out of a total of 60 points)

Table 2: Summary of Employment Land Review

Site	Total area (ha)	Developed vacant area	Un-developed vacant area	Access to public transport	Access to the main road network	Average quality of the site	Development constraints	ELR Score (out of 60)
Dowren House, Foundry Lane, Hayle (High quality business park)	0.14	0	0	ELR score 5		28		48
Foundry Farm, Foundry Lane, Hayle (Incubator/SME cluster site)	0.025	19 sq m	0	ELR score 5		27		49
Guildford Road Industrial Estate, Guildford Road, Hayle (General industrial/business area)	4.628	0	0	ELR score 3		25		45
Marsh Lane Industrial Estate, Marsh Lane, Hayle (General industrial/business area)	6.167	0	1.402	ELR score 4		26		51
North Quay, North Quay, Hayle (General industrial/business area)	3.227	265 sq m	0	ELR score 5		17	WHS	38
South Quay, South Quay, Hayle (Warehouse/distribution)	1.406	0	0	ELR score 5		18	WHS?	41
Treglisson Farm, Wheal Alfred, Hayle (General industrial/business area)	0.176	0	0	ELR score 1		28		38
St Erth Industrial Estate, St Erth (General industrial/business area)	3.735	0	1.067	ELR score 3		14		36
Proposal EA, St Erth (Allocated site)	6.3	0	6.3	ELR score 4		-		41
Proposal E-B, St Erth (Allocated site)	1.371	0	1.371	ELR score 3		-		37
Proposal E-C, St Erth (Allocated Site)	0.362	0	0	ELR score 3		-		39
Proposal E-D, St Erth (Allocated site)	1.465	0	1.465	ELR score 3		-		39
TOTALS	29.002	0	11.602			183		502

Note: The table does not include the main part of South Quay which comes under the Penwith Local Plan Proposal TV-D which provides for a mixed use development:

Hayle Harbour Proposals

ING Red UK (Hayle Harbour) Ltd have an Outline application (08-0613) for the redevelopment of Hayle Harbour, currently deferred awaiting 106 agreement. The application proposes a mixed use development in line with Local Plan Proposal TV-D comprising a mix of residential (1,039 dwellings) with retail and business space including accommodation for the Wave Hub renewable energy project, 8,000 sq m of employment space on North Quay and a further 5,000 sq m of business space on South Quay and the adjacent land facing Harvey's Foundry.

The Penwith District Local Plan 2004 contained four allocations at St Erth near to Hayle, one of these, proposal E-C has been subsequently developed as a public amenity site for waste collection and recycling, the remaining three have been included in this assessment. The three allocations are located in a site contained to the west by the former St Erth Creamery, the St Ives Branch Line and St Erth River to the east and the A30 trunk road to the north. The sites were allocated at the time due to accessibility to the trunk road, potential for rail freight and the perception of supporting regeneration proposals at Hayle harbour. It should be noted that the last reason of supporting regeneration proposals at Hayle harbour is this report not clear. The proposals have not yet come forward for further development (apart from a section of proposal E-D which now houses a cake drying store associated with the adjacent water treatment works) mainly due to infrastructure requirements and issues surrounding accessibility.

4 Analysis

Analysis of the Employment Land Review shows that there are 11 existing employment areas. The existing estate located at South Quay does not include the main part of South Quay which is alternatively covered by Penwith Local Plan Proposal TV-D) within and around Hayle. These 11 sites in total cover an area of 28.6 ha. In total there is 11.967 ha of undeveloped vacant land.

The average overall score in the ELR for the sites (including the separate scores for the allocated areas) is 41 (against a Cornwall average from the ELR data of 36). The highest possible score (if every aspect was rated very good) would be 60. The sites have been classed as either good (score of >45), average (score 25-44) and poor (<25). Four sites in Hayle scored in the "good" category. All the other sites fell within the "average" category, with no sites being categorised as "poor". The lowest score at 36 was for an allocated site at St Erth.

From 1st April 2006 31st March 2009 a total of 5,245 sq m of net employment floorspace has been developed with Hayle. This includes a total 666 sq m of B1, 4,579sq m of B2 and 0 sq m of B8. In addition a further 7,269 sq m of floorspace has detailed planning permission or is currently under construction for employment use. There are no recorded losses to employment land in Hayle. As a result the net employment floorspace with planning permission or under construction is 7,269sq m.

Table 3 below sets out the net completions and permission/ under construction totals for Hayle from 1/4/06 to 31/3/09. The statistics for the year 2009 to 2010 are currently being compiled and are not yet available.

Table 3: Summary of Employment Completions/ Permissions and sites Under Construction from 1/4/06 to 31/3/09 (Net figures)

	Completions (sq m)	Floorspace with pp/uc	Loss of space	NET TOTAL
B1	666	-	-	666
B2	4,579	5,849	-	10,428
B8	-	1,420	-	1,420
TOTAL	5245	7269	-	12,514

Permissions with UCO of B1,B2 and B8 are here counted as B2

It should be noted that these figures were compiled from data gathered by the former Penwith District Council as a part of the annual employment land monitoring work. The totals only include use classes B1 to B8 as complete figures for other use classes are not available. For the sites with planning permission and under construction it is not possible to provide a break down into use classes B1a, b & c, so only a more general B1 figure can be used.

5 Conclusions

This initial assessment of the Employment Land Review demonstrates that there is 11.6 ha of vacant undeveloped land on the 11 sites that were surveyed. The average score for quality of the 8 sites (the 4 allocated sites are not developed and so cannot be scored for built environment) was 23 out of a possible 30. There were only one sites that scored less than half of the possible points.

Part of South Quay was not surveyed as part of the ELR as the historic quay is covered by Penwith Local Plan Proposal TV-D.

The Amion Study 2007 gave a variety of scenarios for employment space growth, but the broad conclusion was that there will be a small increase in the demand for B1c and B2 employment land of between 1.5ha to 4.2ha; an increase in the demand for B1a/b of between 5.4ha and 7.8ha; and B8 from between 1.3ha and 5ha of employment land from 2007 to 2017. These trends are borne out by analysis of the employment completions and sites with planning permission or under construction which demonstrates a similar growth to B1, B2 and B8 uses.

The ELR, in focussing on existing sites and did not consider the potential for employment sites linked to new development proposal that may emerge as a strategy for Hayle is developed. Currently ING Red UK Ltd have submitted an Outline permission for a mixed use redevelopment of the harbour area which incorporates some 19.89ha of office and industrial space.

A summary of the statistics demonstrates the following:

- Total vacant developed floorspace = **284 sq m**
- Net additional floorspace created (06-09) = **5,245sq m**
- Net floorspace with planning permission and under construction = **7,269sq m**
- Total vacant employment land = **11.6ha**

Appendix 1: The ELR Site Proformas

Existing Site:
 Dowren House
 Foundry Lane, Hayle

Total Area: 0.14
Dev. Vacant Area: 0
Un Dev. Area: 0



Market Segment of Existing Developed Sites - High Quality Business Parks

Quality of existing portfolio and internal environment

Average Age of buildings: 5.0
 Average Quality of buildings: 5.0
 Noise and other obvious pollutants: 5
 State of the external areas and public realm: 4
 Parking, internal circulation and servicing: 4
 Ease of access to site: 5

Accessibility

Access by public transport: 5

Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site: 4
 Perception of the wider environmental quality: 1
 Local facilities for work force: 5

Strategic Access

Ease of access to main road network: 4
 Proximity to rail, sea or air freight: 1

TOTAL SCORE:- 48

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 Foundry Farm
 Foundry Lane, Hayle

Total Area: 0.025
Dev. Vacant Area: 0
Un Dev. Area: 0



Market Segment of Existing Developed Sites - Incubator/SME Cluster Sites

Quality of existing portfolio and internal environment

Average Age of buildings:	5.0
Average Quality of buildings:	3.0
Noise and other obvious pollutants:	5
State of the external areas and public realm:	5
Parking, internal circulation and servicing:	4
Ease of access to site:	5

Accessibility

Access by public transport:	5
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	4
Perception of the wider environmental quality:	3
Local facilities for work force:	5
<u>Strategic Access</u>	
Ease of access to main road network:	4
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 49

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 Guildford Road Industrial Estate
 Guildford Road, Hayle

Total Area: 4.628
Dev. Vacant Area: 0
Un Dev. Area: 0



Market Segment of Existing Developed Sites - General Industrial/Business Area

Quality of existing portfolio and internal environment

Average Age of buildings:	3.0
Average Quality of buildings:	3.7
Noise and other obvious pollutants:	4
State of the external areas and public realm:	5
Parking, internal circulation and servicing:	5
Ease of access to site:	5

Accessibility

Access by public transport:	3
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	4
Perception of the wider environmental quality:	3
Local facilities for work force:	5
<u>Strategic Access</u>	
Ease of access to main road network:	4
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 45.66

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 Marsh Lane Industrial Estate
 Marsh Lane, Hayle

Total Area: 6.167
Dev. Vacant Area: 0
Un Dev. Area: 1.402



Market Segment of Existing Developed Sites - General Industrial/Business Area

Quality of existing portfolio and internal environment

Average Age of buildings:	4.0
Average Quality of buildings:	4.0
Noise and other obvious pollutants:	4
State of the external areas and public realm:	4
Parking, internal circulation and servicing:	5
Ease of access to site:	5

Accessibility

Access by public transport:	4
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	5
Perception of the wider environmental quality:	5
Local facilities for work force:	5

Strategic Access

Ease of access to main road network:	5
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 51

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 North Quay
 North Quay, Hayle

Total Area: 3.227
Dev. Vacant Area: 0
Un Dev. Area: 0



Market Segment of Existing Developed Sites - General Industrial/Business Area

Quality of existing portfolio and internal environment

Average Age of buildings:	2.0
Average Quality of buildings:	2.0
Noise and other obvious pollutants:	4
State of the external areas and public realm:	1
Parking, internal circulation and servicing:	5
Ease of access to site:	3

Accessibility

Access by public transport:	5
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	5
Perception of the wider environmental quality:	2
Local facilities for work force:	5
<u>Strategic Access</u>	
Ease of access to main road network:	3
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 38

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 South Quay
 South Quay, Hayle

Total Area: 1.406
Dev. Vacant Area: 0
Un Dev. Area: 0



Market Segment of Existing Developed Sites - Warehouse/Distribution

Quality of existing portfolio and internal environment

Average Age of buildings:	2.0
Average Quality of buildings:	2.0
Noise and other obvious pollutants:	3
State of the external areas and public realm:	2
Parking, internal circulation and servicing:	5
Ease of access to site:	4

Accessibility

Access by public transport:	5
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	4
Perception of the wider environmental quality:	4
Local facilities for work force:	5
<u>Strategic Access</u>	
Ease of access to main road network:	4
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 41

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 Treglissan Farm
 Wheal Alfred, Hayle

Total Area: 0.176
Dev. Vacant Area: 0
Un Dev. Area: 0



Market Segment of Existing Developed Sites - General Industrial/Business Area

Quality of existing portfolio and internal environment

Average Age of buildings:	4.0
Average Quality of buildings:	4.0
Noise and other obvious pollutants:	5
State of the external areas and public realm:	5
Parking, internal circulation and servicing:	5
Ease of access to site:	5

Accessibility

Access by public transport:	1
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	5
Perception of the wider environmental quality:	1
Local facilities for work force:	1
<u>Strategic Access</u>	
Ease of access to main road network:	1
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 38

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 Proposal EA
 St Erth

Total Area: 6.3
Dev. Vacant Area: 0
Un Dev. Area: 6.3



ALLOCATED SITES

Site Development Constraints

Site Access; layout of the internal estate road system:	0
Topography, size and shape:	4
On-site environmental issues:	3
Contamination/land instability/on-site structures:	5
Amenity of adjacent occupiers:	5

Accessibility

Access by public transport:	4
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	5
Perception of the wider environmental quality:	5
Local facilities for work force:	3

Strategic Access

Ease of access to main road network:	5
Proximity to rail, sea or air freight:	1

Sequential Test and Brownfield/Greenfield

Previously developed in whole or part:	1
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TOTAL SCORE:- 41

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 Proposal E-B
 St Erth

Total Area: 1.371
Dev. Vacant Area: 0
Un Dev. Area: 1.371



ALLOCATED SITES

Site Development Constraints

Site Access; layout of the internal estate road system:	0
Topography, size and shape:	5
On-site environmental issues:	5
Contamination/land instability/on-site structures:	5
Amenity of adjacent occupiers:	5

Accessibility

Access by public transport:	3
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	4
Perception of the wider environmental quality:	2
Local facilities for work force:	2

Strategic Access

Ease of access to main road network:	4
Proximity to rail, sea or air freight:	1

Sequential Test and Brownfield/Greenfield

Previously developed in whole or part:	1
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TOTAL SCORE:- 37
 [Scoring: 5 = very good, 1 = very poor]

Existing Site:

Proposal E-C

St Erth

Total Area: 0.362**Dev. Vacant Area:** 0**Un Dev. Area:** 0**Quality of existing portfolio and internal environment**

Average Age of buildings:	4.0
Average Quality of buildings:	4.0
Noise and other obvious pollutants:	2
State of the external areas and public realm:	3
Parking, internal circulation and servicing:	5
Ease of access to site:	4

Accessibility

Access by public transport:	3
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	4
Perception of the wider environmental quality:	3
Local facilities for work force:	2
<u>Strategic Access</u>	
Ease of access to main road network:	4
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 39

[Scoring: 5 = very good, 1 = very poor]

Existing Site:

Proposal E-D

St Erth

Total Area: 1.465**Dev. Vacant Area:** 0**Un Dev. Area:** 1.465**ALLOCATED SITES****Site Development Constraints**

Site Access; layout of the internal estate road system: 0

Topography, size and shape: 5

On-site environmental issues: 5

Contamination/land instability/on-site structures: 5

Amenity of adjacent occupiers: 5

Accessibility

Access by public transport: 3

Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site: 4

Perception of the wider environmental quality: 2

Local facilities for work force: 1

Strategic Access

Ease of access to main road network: 3

Proximity to rail, sea or air freight: 5

Sequential Test and Brownfield/Greenfield

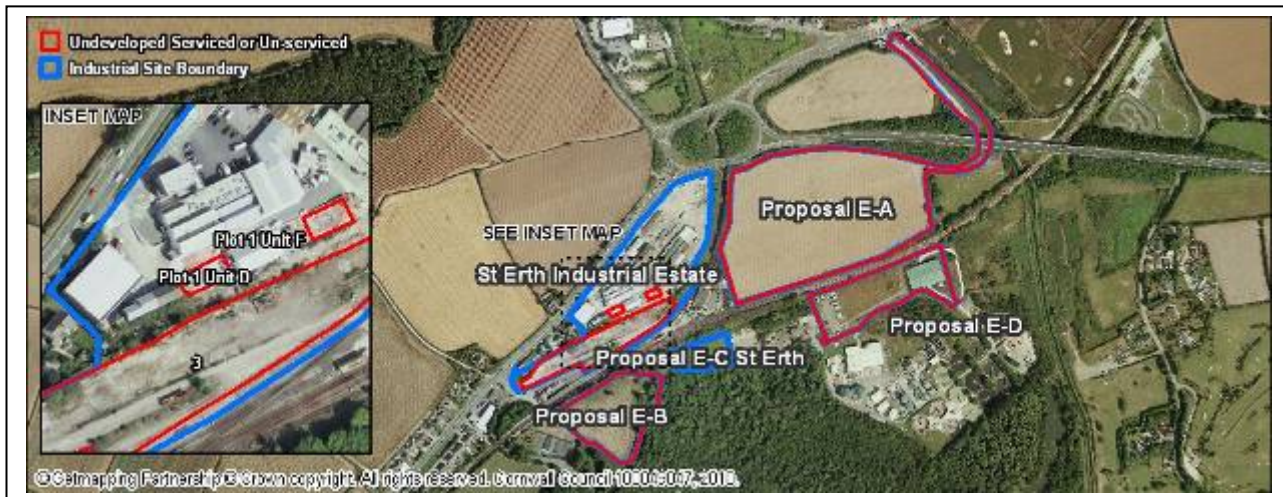
Previously developed in whole or part: 1

TOTAL SCORE:- 39

[Scoring: 5 = very good, 1 = very poor]

Existing Site:
 St Erth Industrial Estate
 St Erth

Total Area: 3.735
Dev. Vacant Area: 0
Un Dev. Area: 1.067



Market Segment of Existing Developed Sites - General Industrial/Business Area

Quality of existing portfolio and internal environment

Average Age of buildings:	2.5
Average Quality of buildings:	3.5
Noise and other obvious pollutants:	2
State of the external areas and public realm:	2
Parking, internal circulation and servicing:	4
Ease of access to site:	1

Accessibility

Access by public transport:	3
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Quality of the wider environment

Adjacent land uses constraining operations or quality of uses on site:	4
Perception of the wider environmental quality:	5
Local facilities for work force:	3
<u>Strategic Access</u>	
Ease of access to main road network:	5
Proximity to rail, sea or air freight:	1

TOTAL SCORE:- 36

[Scoring: 5 = very good, 1 = very poor]

