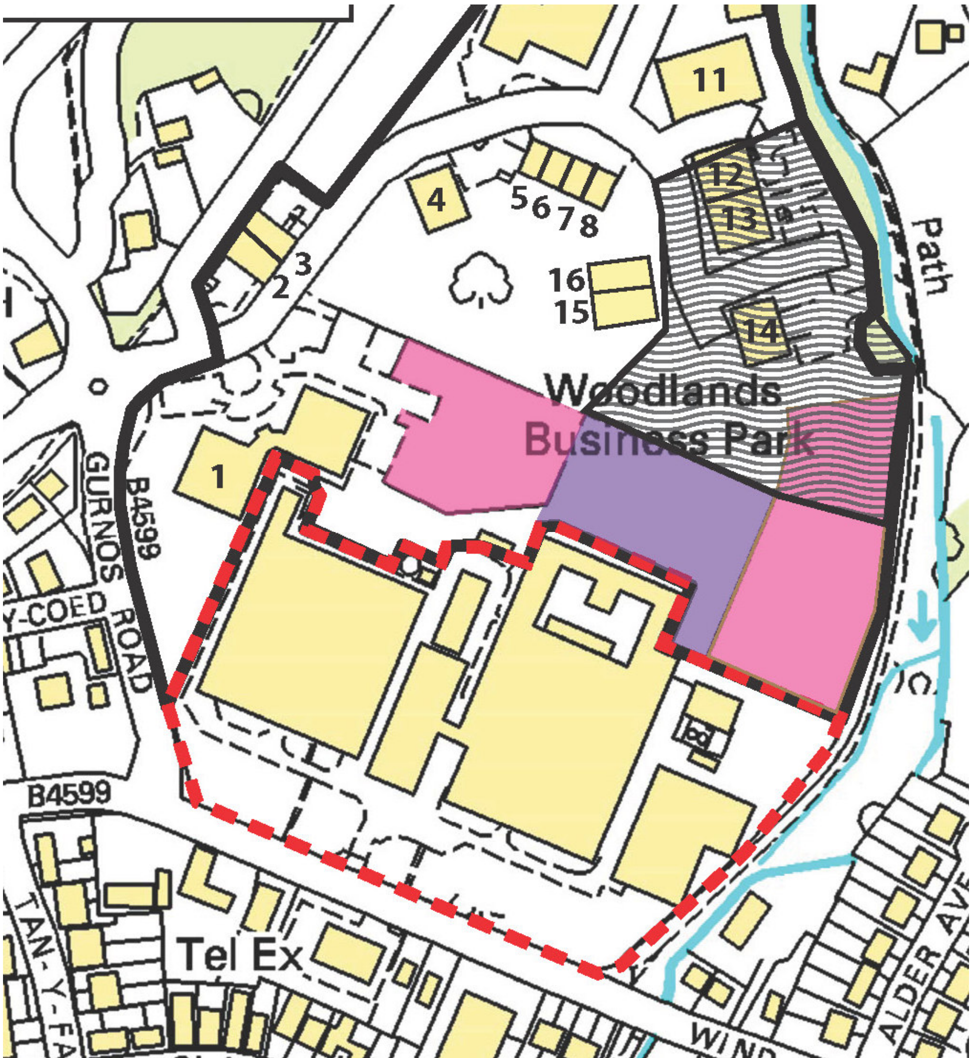
Powys County Council

Upper Swansea Valley Business Unit Development Study



Final Report

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Powys County Council

Upper Swansea Valley Business Unit Development Study

Final Report

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1 Introduction/Background to Study

Powys County Council commissioned Hyder Consulting in December 2009 to undertake a study to provide an overview of the current state of play of businesses units within Ystradgynlais, and to identify the key property issues facing them. From this, the client brief required the formulation of an Action Plan which clearly identifies what needs to be done to tackle these issues.

The brief explained the need for a holistic understanding of the situation across the whole area, rather than looking at individual units or small groups of units, however it was agreed that the review and action plan should focus on the following business/enterprise parks and industrial estates:

- Woodlands Business Park
- Gurnos Industrial Estate
- Ynyscedywn Enterprise Park
- Trawsfordd Workshops
- Caerbont Enterprise Park

The brief set out that the first stage of the study should provide a comprehensive review of data and consultation with stakeholders and other agencies covering the following:

- Number, location, and condition of business units
- Vacancy/occupancy rates
- Why certain units are easy or difficult to let
- Potential growth/expansion of local businesses
- How business units are owned/managed/let, and any issues associated with this

The production of an Action plan, following the stage 1 assessment, was considered the most important aspect of the study, and should aim to:

- Increase occupancy rates
- Enable expansion and investment
- Tackle under/over provision
- Identify any new/speculative units
- Identify the proposed size, type and tenure of any future speculative builds
- Identify modernisation and upgrading needs of existing units
- Identify opportunities for joint working and public/private partnerships
- Identify and risks

It was made clear that the action plan must be able to provide robust deliverable priorities which the client and partners can use to guide allocation of resources.

2 Strategic Policy Context

Strategic Regeneration

In the 'One Wales' Agreement the Assembly Government makes a commitment to:

"establish integrated and cross-cutting initiatives aimed at economic development and regeneration, particularly in areas of high deprivation."

It is recognised that in order to deliver this commitment, and deliver long-lasting economic and social outcomes, better co-ordination of regeneration activities in terms of investment in both people and places is needed. There is an emergent agreement that employment prospects are more strongly influenced by personal factors such as skills and ambition than by just physical regeneration and where people live. Therefore, the Assembly Government and its partners are moving towards a more strategic, integrated, collaborative, long-term, holistic approach to regeneration based on a simplified funding regime. As a result, priorities for regeneration spending going forward will be driven by:

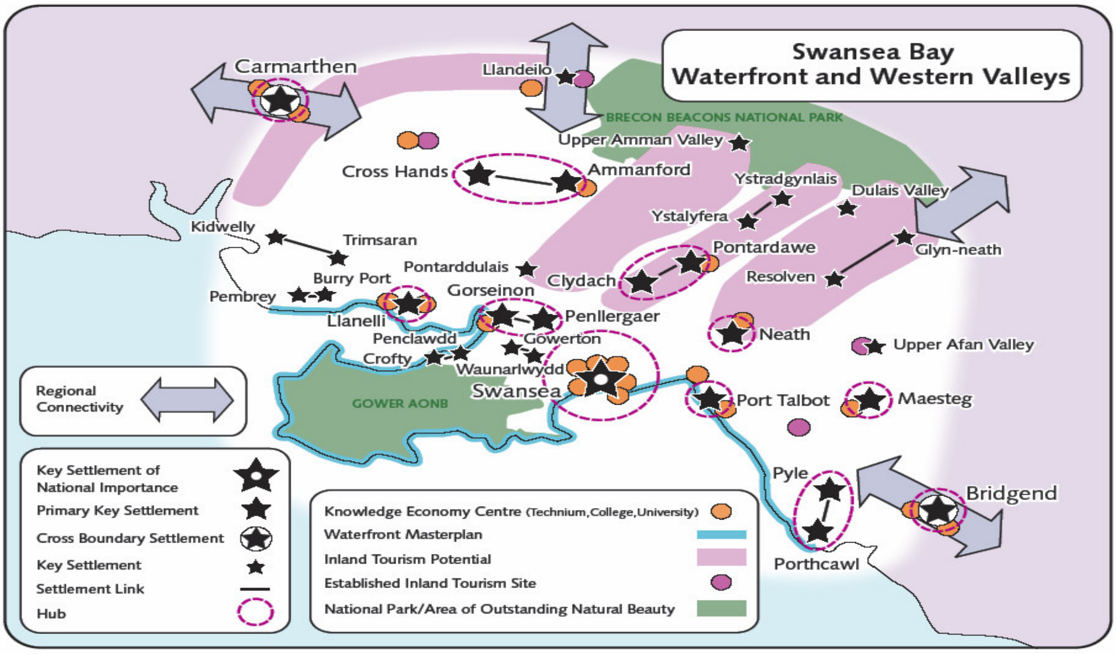
- a consistent approach over time driven by the Wales Spatial Plan
- a strong focus on integrated policy and delivery, underpinned by the Making the Connections agenda
- empowering communities to contribute to their own regeneration and to design services around the needs of the user.

In this context of strategic area regeneration, in November 2008 the **Western Valleys Strategic Regeneration Area** (SRA) was announced to ensure significant resources are specifically directed to tackle long standing issues in the region. The SRA covers approx 150 square miles and includes a population of around 136,000 people. The area crosses five local authority boundaries and stretches from the Amman Valley in the west across to the Upper Garw and Ogmore Valleys in the east, taking in parts of the Swansea, Dulais, Neath and Afan Valleys and extending to Ystradgynlais in the Upper Swansea Valley.

The key characteristics of communities located within the Western Valleys SRA are typical of many former mining and industrial areas in decline including some degraded landscapes, dereliction, with higher than average worklessness and poor health outcomes and a general lack of investment over time. Conversely however, the Western Valleys also contain some of the most striking scenery in Wales, including a gateway to the Brecon Beacons and remnants of important industrial and cultural history.

The Western Valleys is part of the **Wales Spatial Plan** area identified as Swansea Bay Waterfront and Western Valleys. The Plan provides the overarching framework and integration tool for investment and development in Wales. The Plan identifies Swansea as the regional capital of south west Wales, this is recognised by the City's status as the only main settlement and the main driver for economic growth in the region.

Figure 2-1 Extract from Wales Spatial Plan 2008



The vision for the Swansea Bay and Western Valleys area is:

"A network of interdependent settlements with Swansea at its heart which pull together effectively as a city-region with a modern, competitive, knowledge based economy designed to deliver a high quality of life, a sustainable environment, a vibrant waterfront and excellent national and international connections."

It is clear; however, as identified in the spatial plan that Swansea is the hub of the area and is the main economic driver, however, Neath, Pontardawe/Clydach, Ammanford/Crosshands and Maesteg are primary key settlements or hubs that are fundamental to the economic wellbeing of the area.

In terms of the Spatial Plan, Ystradgynlais as an example of a cross-boundary settlement located within both the Swansea Bay the adjoining Central Wales areas. In the Central area plan, Ystradgynlais maintains links with the Brecon Beacons cluster of key settlements, although the area has a more clearly defined role in the Swansea Bay plan area. The Plan identifies Key Settlements where in order to help build sustainable communities, housing growth, new employment sites, and retail and indoor leisure development should be co-located and well served by public transport. Ystradgynlais and nearby Ystalyfera have been categorised as supporting communities dependent on the Pontardawe hub for some key amenities. Importantly, the Plan considers key settlements such as Ystradgynlais as provide an important local service and employment function. Their development is a vital element of the strategy for the Area. Regeneration activity will concentrate on providing improved shopping, leisure, community and cultural facilities, more attractive and affordable housing, clean vibrant town centres, accessible open countryside and employment opportunities.

In terms of addressing regeneration, the **Western Valleys SRA Operating Framework** (draft), identifies the key issues and actions already being undertaken in the SRA. In terms of employment sites it identifies the current approach is to provide a range of local sites in and near main settlements and the application of Convergence funding for three employment activities. It is worth noting that Ystradgynlais falls outside of the Convergence area, but qualifies for Competitive funding.

- Infrastructure and services support
- Mapping of employment site potential across SRA
- Promote investment in sites linked to transport routes and housing development

The SRA themes for investment reflect the key strands of sustainable development and provide the framework for regeneration for the Western Valleys that will deliver the regeneration these communities deserve. In terms of business development and enterprise, the framework identifies:

- New and accessible employment, including entrepreneurship
- Develop quality sites and premises within which businesses can operate

The draft Action Plan 2009-2012 identifies as one of the strategic themes the physical regeneration of employment sites and premises and with added value actions linked to the Spatial Plan and transport and housing proposals.

Local Regeneration

The **Mid Wales Employment Land Strategy 2001-2016** was published in 2001, and although now largely in need of updating, it provides important and relevant context for this study. The Mid Wales economy is not forecast to remain competitive and there are a number of challenges to be addressed if decline is to be avoided. The 2001 strategy explains that there needs to be a move towards employment in the high 'value- added' knowledge based sector, identifying key elements of the value added economy as:

- Competitive small and medium sized enterprises (SME's) to cultivate a value added economy through creation and expansion of businesses, securing better paid employment opportunities.
- A knowledge based economy, based on the development of specialist skills and knowledge.
- Entrepreneurship / business formation in combining the need for an innovative and entrepreneurial culture.
- A quality environment – developing the right economic conditions to support high rates of business formation, including business support structures and skills availability.

Key drivers to move to a high value-added economy were identified as:

- Changing the competitive base – stimulating entrepreneurship and innovation by supporting local business, developing clusters as a focus and effecting a business culture change.
- Growing the skills base – knowledge is critical to underpinning a value-added economy and therefore individual skills must be developed to their maximum potential and an appropriate framework put in place to retain and attract the highly skilled.
- Developing quality business locations – locational decisions will be made on the basis of factors including prestige, accessibility (real and virtual) and access to skilled staff. The provision of appropriate locations is therefore critical to underpinning the strategy.

The consultants concluded that the move towards new economic prosperity opens up a range of business opportunities, in sectors such as ICT / multi media and customer contact centres, not directly affected by the traditional implications of peripherality. However fundamental to this is the need for high skill levels, high quality ICT infrastructure and the provision of appropriate quality sites and premises. Opportunities also exist to improve the value added manufacturing sector – skilled engineering, biotechnology, food production and processing.

The **Powys Unitary Development Plan** (UDP) generally accords with the needs set out in the Employment Land Strategy, as well as with Planning Policy Wales' guidance that UDP's should identify a range and choice of sites to meet different economic and employment needs. The UDP identifies a hierarchy of employment sites: Strategic Employment Sites including General Sites and Local Sites meeting local needs.

There is at present one General Site within the Ystradgynlais area known as the Woodlands. These sites of under 5ha and capable of accommodating a mix of employment uses and should make provision for business development (use class B1), general industry (use class B2) and storage and distribution (use class B8).(A description of the types of uses that fall within these use classes can be found in the glossary of the Powys UDP written statement)

Local Sites are sites around 1ha designed to support locally generated small scale demand. Within Ystradgynlais there are 3 such sites, two of which are already established employment areas:

- Cae'r-bont
- Penrhos (undeveloped)
- Ynyscedwyn

The UDP's aim is to ensure that there is at least a five year supply of effectively available land for employment purposes within Powys at any given point in time. There are 4 sites (totalling 5.3 ha) allocated in the UDP within Ystradgynlais:

- Hendreladus, Penrhos (1 ha)
- Caerbont Enterprise Park (1.5ha)
- Woodlands Business park (2.1ha)
- Ynyscedwyn Enterprise Park (0.7ha)

Since drafting the UDP, 1 ha at the Woodlands Business Park has been developed leaving a total of 4.3ha available within the study area. In order to maintain this supply of land, the UDP identifies it is important to protect employment sites so that they are not lost to other forms of development. Safeguarding existing and potential jobs and ensuring that sites and premises remain available for economic opportunities is vital to the sustainability of communities and the economic vitality of the area in general. All new developments will be required to provide a high quality of building design and landscaping, reflecting both rising business and employee aspirations and the exceptional quality of the environment in Powys.

The **Upper Swansea Valley Strategic Regeneration Framework (2009)** addresses qualitative aspects of the employment land and premises with Ystradgynlais, including under Programme Area 1: Growing local enterprise, skills and employment. The Framework identifies the importance of a more diversified and locally embedded employment and the important role for manufacturing and skilled trades to match local employment profile and to produce more value added products. To achieve this, the Framework identifies investment will be required in several key areas:

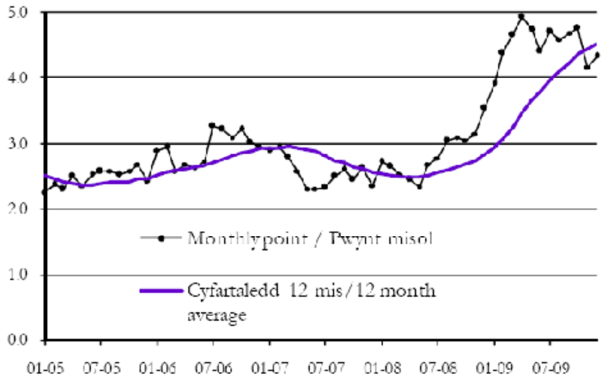
- Industrial Estate Investment Programme
- Coordinate Asset Management
- Development Sites Promotion
- Business Relationship Management
- Marketing Strategy
- Business Networks

Current Employment Needs

Statistics show Ystradgynlais is a primary employment location for local residents and surrounding communities especially those north and north east of the town. However, economic activity is over 10% lower in the study area than in Powys as a whole with about 2 in 3 people of working age in employment. Of those in employment, there is a significantly higher proportion of Skilled Trade workers (2.6%) and Process Plant and Machine Operatives (3.2%) in the Upper Swansea Valley than Wales. ‘Manufacturing’, ‘Wholesale and retail trade, repairs’ and ‘Health and Social Work’ are the largest employment sectors.

According to data released in January 2010 by the Office for National Statistics and Powys County Council's Research and Information Unit the highest claimant unemployment rates among the county's 15 Local Community Forum Areas (LCFAs) included Ystradgynlais LCFA at 4.3% (2.7% for Powys) which has seen a general rise in average unemployment rates for over 18 months.

Figure 2-2: Unemployment Figures for the Ystradgynlais LCFA



Source: Powys County Council/ONS

Key Issues

The appraisal of the strategic and local context has led to the identification of the following key issues which will shape the priorities of the study.

- Located within an area of greatest need which benefits from a strategic, long term, holistic regeneration programme.
- Ystradgynlais is a key settlement for new employment as part of a Western Valleys network of centres
- Priority to regenerate & develop new employment sites and premises
- Appropriate, high quality business locations critical to developing a higher value added local economy
- Need for a coordinated investment and management of employment sites and premises
- Economic rationale for investment - high unemployment, low economic activity

3 Business Property Review

The remit of the study is provide a holistic review of business units within Ystradgynlais, and the report focuses on the main business/enterprise parks and industrial estates within the Ystradgynlais area. The locations of these sites are shown in Figure 3.1.

The most southerly of the business parks is Woodlands Business Park (one of the larger and higher quality parks in the study area). It has excellent connections to the A4067 (a strategic road which connects to the M4, which is situated circa 15km south)

In close proximity (0.4km North West) of the Woodlands business park is the Gurnos Industrial Estate- which is a small, low key estate. Access to the estate is off the A4068, and is in close proximity to the A4067.

Ynyscedwyn Enterprise Park and the Trawsfordd Workshops occupy a fairly central location in comparison to the other sites, and is situated some 0.4 km west of Ystradgynlais town centre. Access to the site is off the B4599, close to the A4067.

Caerbont Enterprise Park is the most northerly of the sites, and feels somewhat detached from the main built up area of Ystradgynlais. It is situated in a rural location, in close proximity to Brecon Beacons National Park., and is the last major employment site between Ystradgynlais and Brecon.

The report provides floor spaces for units within the business/enterprise parks and industrial estates, these figures are based on a combination of estimates, information provided by letting agents, and details from the Valuation Office Agency (VOA).

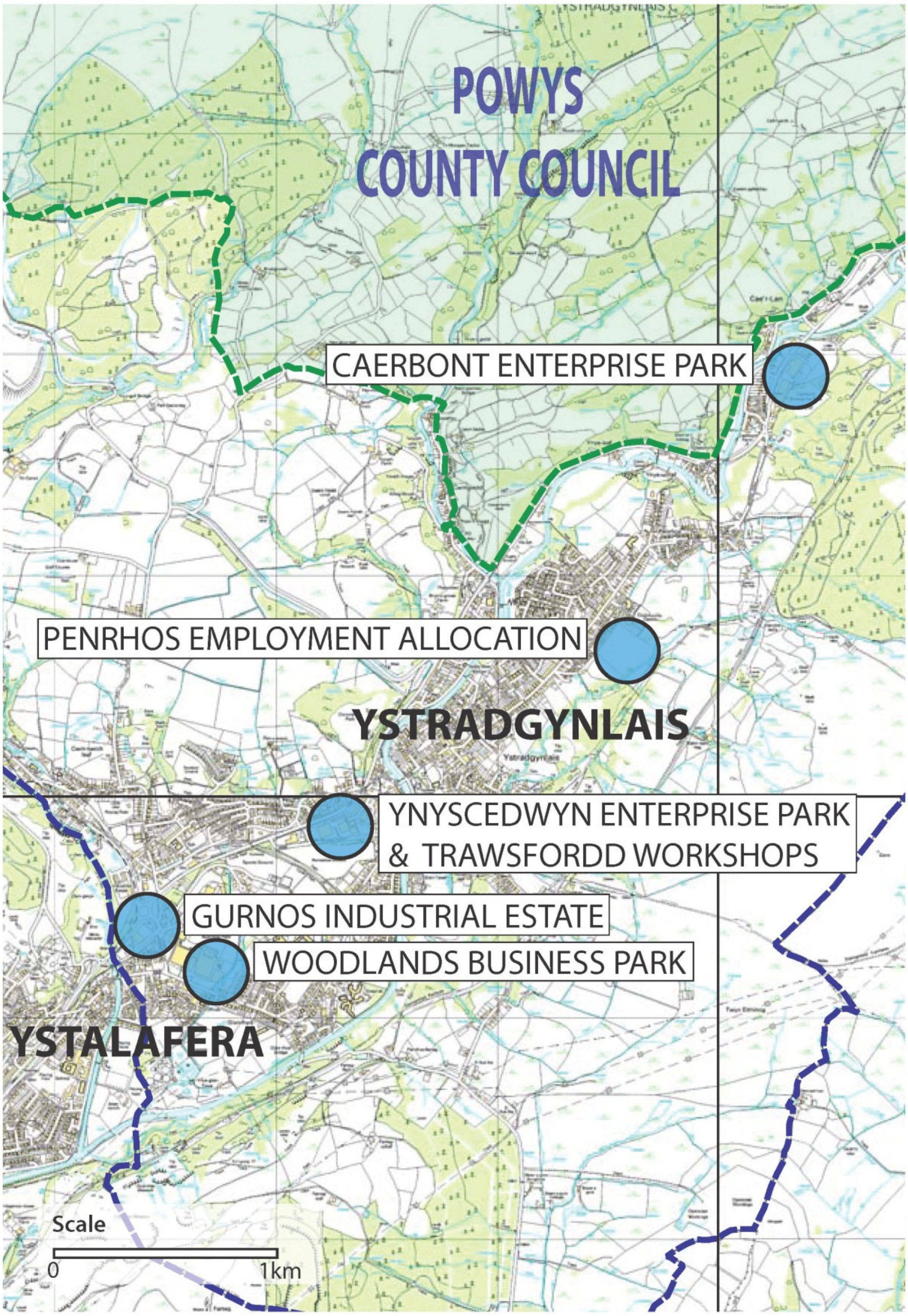


Figure 3-1 Location of Business/Enterprise Parks and Industrial Estates in Ystradgynlais

3.1 Woodlands Business Park

Location

Woodlands Business Park is situated within the town of Ystradgynlais and benefits from being in close proximity to the A4067. The business park is surrounded by a mix of uses including residential, a school, and open space (to the north of the business park, which comprises a series of fields).

Although there are no shops or eateries within the business park itself, in close proximity is a Cooperative supermarket and a public house.

Description of Business Park

Woodlands Business Park is one of the larger (7.6 ha) and higher quality business parks within the study area, which is apparent in its designation as a strategic employment site in the Powys UDP. The business park accommodates a mix of larger and smaller light production/ manufacturing businesses, and also some smaller scale service businesses. Two of the larger production businesses (Springdew and Streetmaster) are quite specialist - Springdew makes healthcare products and Streetmasters manufactures street furniture. Springdew employs a large number of staff relative to the other businesses, and at present employs over 250 full time staff, it also occupies the largest ‘percentage of total floor space in the business park (47%) compared to Streetmaster which occupies a floor space of 18,540 sq ft (16% of total floor space in business park) but employs 18 full time staff. Sumito, another of the larger businesses (occupy 18% total floor space) employs 80 full time staff. Three of the smaller businesses (which occupy a floor space of less than 6,000 sq ft) specialise in motoring (which include a motorbike accessory supplier and two companies providing driving training and expeditions). Consultation would suggest that these businesses see the benefits of clustering and on occasions share knowledge and resources.

Site Details

Photograph 3.1- One of the more recently constructed business units in the Woodlands Business Park

The business park comprises a total of 16 different sized units which range in size from 3,196 sq ft up to 20,800 sq ft, though the majority (75%) are between 3,000 and 5,000 sq ft. It has been developed in somewhat of a piecemeal fashion over a number of years and the different styles and condition of the units on the estate reflect this. The units at the front of the site are fairly typical of the light industrial type units that were being developed in the 1980’s, though towards the rear of the site there are some very new units that have been developed over the past three or four years and which are an excellent example of modern business units.

Table 3-1 provides an overview of the types of businesses within the park and the amount of floor space they occupy. The location of these business units within the business park is shown in Figure 3-2.

Table 3-1 List of Businesses in Business Park

Unit No	Name of Business	Nature of Business	Number of units occupied	Amount of Floor space (sq ft)		% of floor space within business park	
1	Sumitomo	Support centre for electrical wiring systems	1	**20,800**		**18%**	
2	Streetmaster	Manufacturer street furniture	5	Unit 2	4,020		
3				Unit 3	4,020		
4				Unit 4	3,500		
5				Unit 5	3,500		
6				Unit 6	3,500		
				Total	**18,540**		**16%**
7	Springdew	Contract packing and filling of pharmaceutical and healthcare products	5	Unit 7	N/A		
9				Unit 9	N/A		
10				Unit 10	N/A		
11				Unit 11	N/A		
12				Unit 12	N/A		
				Total	**52,500**		**47%**
8	Off road Skills	Provides courses in off road driving	1	3,500		3%	
13	Electrohom	High power resistors manufacturing	1	5,731		5%	
14	Touratech	Motorbike accessory supplier	1	5,338		5%	
15	BMW driver training/Globe Busters	Provides motorcycle training and expeditions	1	3,196		3%	
16	Vacant		1	3,196		3%	
	Total			**112,801**		100%	

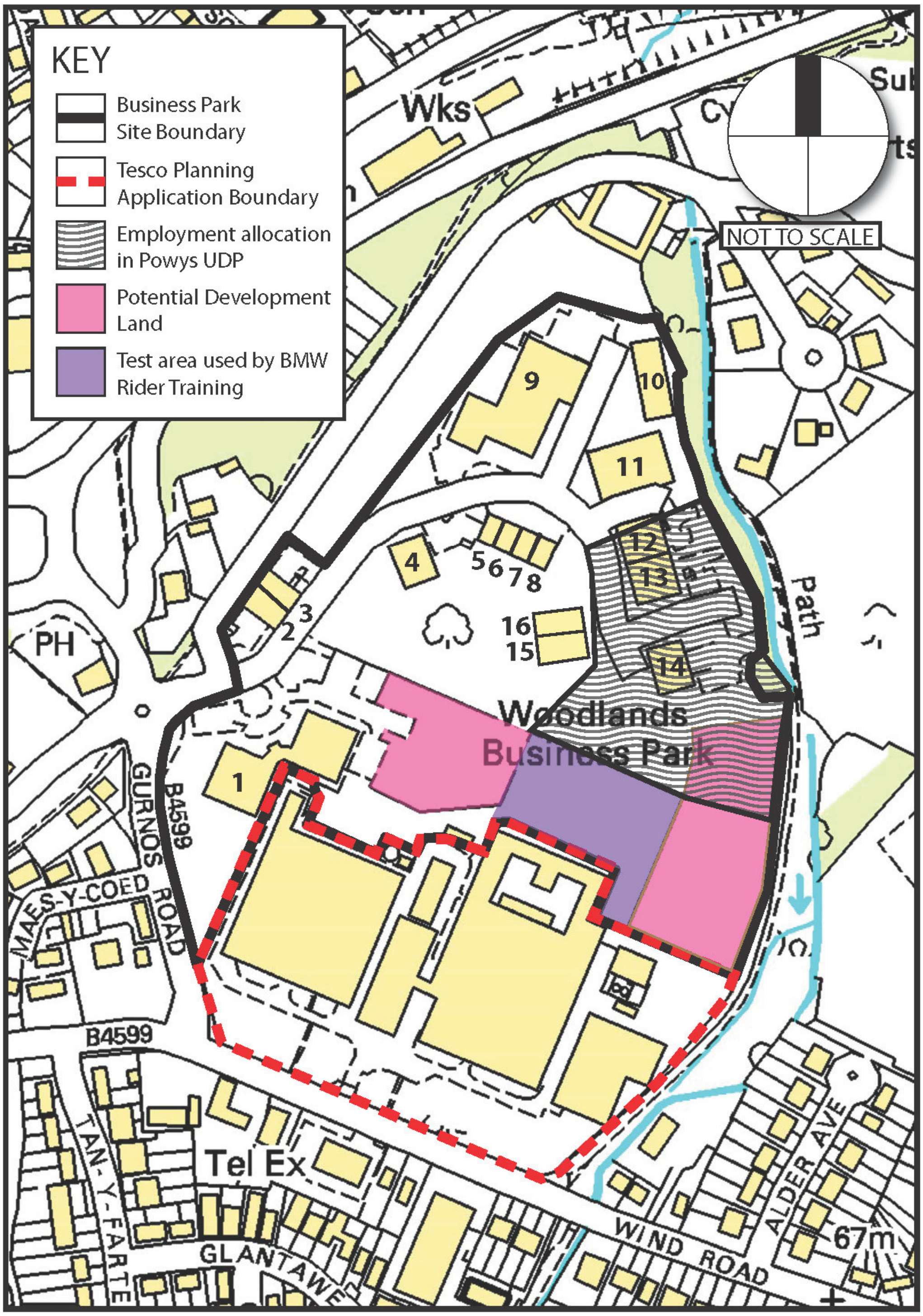


Figure 3-2 Woodlands Business Park

Both Springdew and Street Master occupy 5 units each and their occupancy has occurred as a result of their incremental growth. As a result, although there are sixteen units on the business park, there are only 8 individual businesses.

The layout of the estate is quite linear in form and with the exception of some of the units occupied by Springdew, the remainder are developed along the length of the estate road. It was observed that on street parking is an issue and occurs particularly around Springdew, although a car parking survey would need to be undertaken to assess the extent to which parking is a problem.

In terms of potential development land within the business park, the Powys UDP allocates (2.5ha) employment land at the Woodlands Business Park (some of this land has been developed), this employment allocation is shown in **Figure 3.2.** In addition to the allocated land, there are two small pieces of land which are fairly low quality that could potentially accommodate additional business units. These sites are situated within the development boundary delineated in the UDP, and would generally satisfy the relevant polices. Discussion with Planning Officers suggests the site is also an opportunity for employment in the emerging Local Development Plan.

Vacancy

The business park has an occupancy rate of 94%, and only has one vacant unit which is one of the more recently constructed business units at the rear of the site developed by Welsh Assembly Government (WAG). This unit has been vacant since it was completed about 12 months ago, although consultation with the letting agents reveal that terms have now been agreed with a prospective tenant and the unit should be occupied very shortly; if this is the case the occupancy rate at the business park would reach 100%. During the period of time that the unit was vacant and being marketed, the agents reported that there was a fairly steady level of enquiries for a variety of uses including light manufacturing and assembly, offices and child care. It is understood that the prospective occupier will pay a rent which equates to £4.50 per sq ft and in our view this is a good level of rent to achieve in this location, and in part reflects on the quality of the unit and the estate as a whole.

Quality and Attractiveness of Units

All of the units on the site are reasonably modern and appear to be generally well looked after. This is particularly true of the recently developed units which are of a high quality design and construction.

There is a fair amount of open space within the business park, and some of this land has attractive landscaping and mature trees which give the site a generally smart appearance and helps create the feel and appearance of a business park as opposed to a more traditional industrial estate.

Ownership and Leasing

It is understood that Springdew own the majority of units that they occupy and that the remainder are owned and managed by WAG. In terms of floor area, this gives a fairly equal split between freehold and leasehold units. WAG confirmed that typically they look for tenants to enter in to a lease for a minimum of three years. The quoting rent for the new units is £4.50 per sq ft, though the older units are currently let at slight discount to this.

The survey results from occupiers reveal that those tenants who lease premises at the business park consider it to be fair or good value for money (3 out of 4 respondents).

Market Demand Assessment

The fact that there is only one vacant unit on the estate demonstrates its popularity and obvious success as a business location. Both the letting agent and WAG confirmed that there has been a reasonable level of demand for the vacant unit, as there was for the two other new units on the estate. This would indicate that there is a demand for modern well specified units of circa

3,000 sq ft that offer flexibility for a wide range of uses. Given the current weakness of the occupier market generally, we would draw the conclusion that if there is demand now for this type of unit, then there must be demand in the short and medium term future.

Consultation with WAG Business Relationship Manager with responsibility for the Woodlands confirmed that the estate is one of the most modern in Mid Wales. Speculative building has been a successful strategy for the estate in the past, as well as responding to the expansion need of existing occupiers. The site is nearing completion and once fully developed it is likely WAG will seek to dispose of the assets to a private investor. To reflect current economic and resource availability, future investment in the site will be demand led and responding to existing tenants or new businesses needs. Consideration has been given to identifying sites to expand the existing estate or to identify a new estate of an equal or higher quality elsewhere in Ystradgynlais, although it would be most efficient to expand the existing site.

The survey results from the occupiers reveal that three out of the four businesses plan to expand over the next 10 years.

What is notable is that Springdew anticipates they will take on 60 additional full time staff over the next 10 years, although they are uncertain how much additional floor space will be needed to accommodate future growth. At the present time, they are looking to relocate within Woodlands Business Park and require a floor space of circa 70,000 square feet (An additional 20,000 sq ft than their current floor space). In terms of issues relating to their current premises, they report that the premises require internal improvements in order to attract businesses in the healthcare sector.

Streetmaster anticipate that they will require circa 5000 sq ft of additional floor space over the next ten years for their expansion, they also indicate that they would be willing to relocate elsewhere in South Wales. The business occupies a number of units, and if additional floor space is not provided to accommodate their future needs it could result in a number of units becoming vacant.

In terms of the smaller business who responded, their future growth over the next ten years is more modest (they anticipate they will need an additional 3001-4000 sq ft of floor space), which they believe could be provided through extending their existing unit and through more intensive use of existing space. Consultation with the occupier suggests that the motorcycle businesses benefit from being in close proximity to the Brecon Beacons National Park- where motorcycling is popular. A key issue for a business BMW rider training is keeping a dedicated external area that they use for motorcycle training, which is currently located in front of the factory unit.

Key Findings and Challenges

The Woodlands estate is an exemplar for Mid Wales and the Western Valleys. Speculative building of a high quality product not normally considered viable in such locations has proven to be competitive enough to attract good tenants and business growth. This has been achieved in an area considered more peripheral to the main markets and transport corridors. There is evidence of growth and expansion from business occupiers and this has created pressures for further investment in sites and premises although not all of this is likely to be met on the existing site. Other key findings include:

- Highest quality estate with strong rent levels achieved
- Fully occupied estate and evidence of further demand for units
- Expressed need for 25,300 sq ft of new floor space from existing occupiers
- Expansion planned by several businesses

- Risk of loosing businesses from the local economy if floor space requirements are not available locally and relocation outside of area
- Promotion of available land within estate for employment uses through the emerging LDP candidates sites register
- Couple of businesses employ a fairly large number of full time staff-(more than 70 staff)

3.2 Gurnos Industrial Estate

Location

The Gurnos Industrial Estate is located opposite the residential area of Gurnos. To the north and south of the estate is undeveloped landscaped and. running to the west of the site is the Afon Twrch, however the estate is not at risk of flooding.

The industrial estate benefits from being in close proximity to the strategic road network, and is situated just off the A4068- which links Gurnos to Brynaman and also connects to the A4067.

Description of Business Park

The Gurnos Estate can be described as a general/industrial estate, and is one of the smaller business parks in the area (1.37 Ha), which is owned and managed by NPT CBC. The estate is considered to be a low key industrial estate and accommodates smaller businesses. The nature of these businesses is quite varied and accommodates businesses typically found on such estates, including a small scale engineering business, a car engine manufacturer, although it also accommodates a floor and carpet wholesaler and a retailer of solar panels, which are not uses typically found at such locations.

There are ten units on the estate, but only four full time businesses which makes the estate appear quite inactive.

Site Details

The estate comprises a total of 10 individual units configured in three small terraces. The two terraces at the front of the site comprise 3 units apiece, all of which are 1,070 sq ft. The third terrace comprises 4 units, each of which is 2,500 sq ft. All of the units are good examples of modern small industrial/business units and have been developed with small start up companies in mind. Flexibility has been incorporated into the design as adjoining units can be combined and thus a range of different sized units can be created. Not only does this provide flexibility when the units are being marketed but it also provides flexibility to occupiers as they have the potential ability to expand and contract - which is evident from carpet and flooring wholesalers occupy two adjoining units. All of the units have a good forecourt area and loading door and are suitable for a wide range of potential uses. They are also highly visible from the road and this is important to many businesses as it is an opportunity to raise their profile.

Table 3-2 Details the businesses within the estate, and areas of floor space they occupy. The location of each of these units within the estate is shown in Figure 3-3.

Table 3-2 Businesses in Gurnos Industrial Estate

Unit No	Business Name	Nature of Business	Amount of floor space (sq ft)	% of floor space
1	Discount Carpet and Beds	Wholesale retail	1,076	**6%**
2	Discount Carpet and Beds		1,076	**6%**
3	Frontier Solar	Design, supply, commission and install a range of environmentally energy saving systems	1,076	**6%**
4	Vacant		1,076	**6%**
5	AP development Ltd	Providing high performance tuning services for car engines (Renault)	1,076	**6%**
6	SDS Precision engineering	Precision engineering	1,076	**6%**
7	Used for storage by NPT CBC		2,699	**16%**
8	Used on temporary basis by Welsh Association Fire Engine Repair Services		2,449	**15%**
9	Vacant		2,500	**15%**
10	Vacant		2,500	**15%**
		Total	**16,604**	

NB: Percentages are rounded which can cause slight inaccuracies

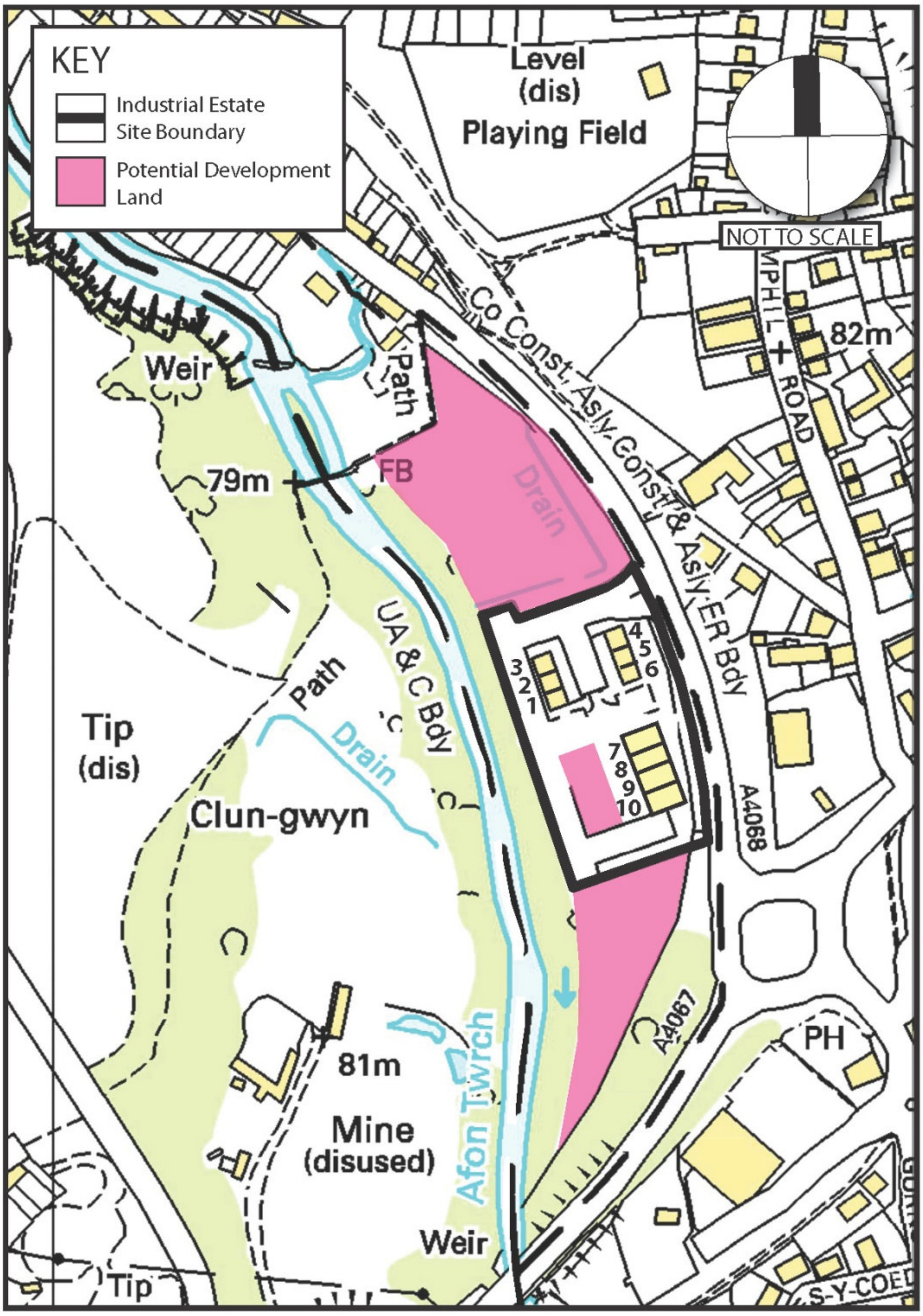


Figure 3-3 Gurnos Industrial Estate

In terms of opportunity for further development in the estate, there is developable land in the south western part of the estate which forms a (0.1 Ha) rectangular shaped grassed area that is served in part by the estate road. The estates surveyor at Neath Port Talbot County Borough Council (NPTCBC) reported that he was not aware that the council has any immediate plans for future development on the site or for any other improvements apart from the ongoing maintenance of the site.

The Industrial Estate is not allocated for employment purposes in the Powys UDP. In terms of expansion land, there is circa 1.6 Ha of potential land adjoining the northern and southern boundary of the industrial estate, which although not allocated for employment, is within the settlement boundary. Discussions with the planning department reveal that employment uses on this land is acceptable in principle, as it would be a compatible use with the existing industrial estate.

Vacancy

There are currently 3 vacant units on the estate, which gives an occupancy rate of 70%. The vacancies tend to be concentred in the larger units and consultation reveals that two of these larger units have been vacant for about 18 months. The Council had difficulty in leasing the larger units, two of which have limited use, through Neath Port Talbot CBC using one of the units for storage, and the other being used on a temporary basis by a volunteer group. These uses do not contribute to the vibrancy of the estate.

Although there is only 3 vacant units, 36% of the total floor space within the estate is vacant.

Table 3-3 Percentage of Vacant Floor space

Amount of floor space (sq ft)	% of vacant floor space
6,076	36%

Discussions with Neath Port Talbot CBC reveal that the small units seldom remain vacant for more than 3-4 months. In contrast the larger units are much more difficult to let and it was the opinion of Neath Port Talbot CBC that these larger units tend to be more suited to established businesses, which often prefer to locate lower down the valley, as they are closer to their markets and the M4 corridor.

Through consultation with the estates department in NPTCBC and from our own assessment, it is not felt that any improvements/alterations to the units would improve the chances of securing tenants, however more targeted marketing should be supported. However it is considered that the estate has a slightly soulless feel and is perceived as isolated and exposed, which could be a deterrent to attracting tenants. The introduction of landscaping within the site could help improve the overall attractiveness of the estate and improve the sense of security.

Quality and Attractiveness of Units

The overall attractiveness of the estate is quite poor, as the land surrounding the units is tarmaced and used for car parking and circulation and there is a lack of any soft landscaping. As such the appearance of the estate is somewhat bland.

The units are fairly modern and are functional for their purposes, and whilst they are not as attractive as the new business units at Woodlands, they are nevertheless well put together and look both modern and functional. The units appear to be well maintained and there are no obvious improvements that could be made to the units themselves.

Ownership and Leasing

All of the units are in the ownership of NPTCBC and they are let on a standard lease. This is for a period of three years and is contracted outside of the landlord and tenant act so that the council can be assured of obtaining vacant possession of units at the end of the lease if they so wish. Whilst the lease period is three years, flexibility is incorporated by way of a monthly break option operable by either landlord or tenant. Under the terms of the lease the tenant is responsible for all repairs with the exception of the roof and walls. The tenant is also responsible for business rates, utility services, insurance and a modest service charge which goes towards the general upkeep of the estate. The typical rents achieved on the estate are £3.75 per sq ft for the smaller 1,050 sq ft units and £3.20 per sq ft for the larger 2,500 sq ft units. Consultation reveals that the lease terms and rental levels are non negotiable.

Three respondents answered the occupier survey, and they indicated that they spend only a small percentage of their turnover on their accommodation (two out of the three respondents indicated they spend between 0-5% of their turnover on accommodation). In addition two respondents consider their premises to be good value for money.

Market Demand Assessment

Whilst there seems to be quite a reasonable demand for the smaller 1,050 sq ft units, there only seems to be a limited demand for the larger 2,500 sq ft units. It is considered that the lease terms are very flexible and the quoting rents are not excessive; as such the lack of demand for these units could be attributed to the location of the estate. Discussions with NPTCBC also reveal that if these types of units were situated further south down the valley (in NPT CBC) then they would be easier to let, and it was revealed that the council often find it difficult to persuade potential occupiers to consider a location north of Pontardawe. This perhaps more of a perception issues for the action plan to address through marketing and sharing of information between estate managers.

In terms of future demand for units, it is not considered likely that additional larger workshop units should be provided, as demand for these size units tend to be low. That said the smaller 1,050 sq ft appear to let well and it would seem that there is some demand for additional units of this size. Estates in NPTCBC also commented that smaller units of circa 500 sq ft always let well across the county and it would seem likely that some units of this size on the estate would let well and would also help to give the estate a busier feel and make it seem less isolated.

Two tenants indicated that they have considered relocating from their current premises; elsewhere in Ystradgynlais, with the businesses indicating that their existing site/premises were too small. Both businesses specified that they would choose larger premises than what they currently occupy (which is circa 1,050 sq ft); one business is looking for premises with a floor space of 1,000-2000 sq ft, and another for a floor space of 2001-3,001 sq ft. The larger vacant units on the estate could potentially accommodate these requirements, and SDS Precision Engineering reported that they are already considering relocating to a larger unit on the estate.

In terms of future growth, the results reveal that all of the respondents anticipate they will expand their businesses over the next ten years. In considering how much additional floor space they would need to accommodate their planned future expansion, one respondent indicated they will need 2001-3000 sq ft of additional floor space, and the other respondent indicated they will require 3001-4000 sq ft of additional floor space.

Key Findings and Challenges

- Positive marketing and promotion of the premises with the objective of achieving higher occupancy levels to reflect the levels achieved on other estates in the area. This could be achieved in cooperation with other estate owners and part of a Property Forum.
- Need for soft landscaping within the estate to improve overall attractiveness
- Vacancy of the Larger Units but the inflexibility of their layout for future subdivision
- Availability of land to promote and expand units onto if market demand exists
- Attractive/flexible lease terms

3.3 Ynyscedwyn Enterprise Park

Location

This is the closest of the business parks to the Ystradgynlais town centre (0.4 km away), where local services are located. The site is well connected to the strategic road network.

Description of Business Park

The Ynyscedwyn Enterprise Park measures 4.6 Ha accommodates a strong variety of businesses, including a small scale engineering businesses, a manufacturer of coin operated arcade machines and a soft drink wholesaler. These businesses are independent and diverse and this suggests an entrepreneurial component of the Enterprise Park. In addition the Enterprise Park includes a significant training and support component in the form of Pathways who provide training for people out of employment, and the All Wales Ambulance Service which provides training for first aid and other healthcare courses to businesses.

Perhaps of the most unique of occupants is a Bible Church which holds religious services, and has other support functions such as mother and toddlers and a youth club from its 4000sq ft premise.

The two largest units are occupied by Top Pops (wholesalers of soft drinks), and APM Cymru Ltd (transport haulage)- both units measure circa 25,000 sq ft. Also situated within the enterprise park are four other units all of about 4,000 or 5,000 sq ft (Bible Church, Aquazone, Weocori Engineering and Harlech tools engineering); it is understood that these are owner occupied and are all in a generally good condition and are well maintained.

Top Pops is situated at the eastern edge of the business park, relatively detached from the other occupants and set within its own landscaped site.

Site Details

The estate comprises two distinct elements separated by the Trawsfordd Workshops. In all there are a total of 21 units on the estate all of varying sizes ranging from 750 sq ft up to 25,000sq ft.

With the exception of Units 1 and 2, (-which are larger at 9,999 sq ft and 4,999 sq ft respectively) and 23 (which are available leasehold), the majority of the units owned by Spencer Properties are small starter units ranging from 750 sq ft up to 1,500 sq ft,. The small units are suitable for a variety of uses and generally include both a small office component and also loading doors suitable for a small van. The two larger units are available either individually or combined and are set in their own landscaped site and have a good external service area and car parking.

Table 3.4 presents details of the types of businesses and area of floor space they occupy. **Figure 3-4** shows the layout of the Enterprise Park.

Table 3-1 Businesses in Ynyscedwyn Enterprise Park

Unit	Name of business	Description of activity	Amount of floor space (sq ft)	% of floor space
1	Vacant at time of survey	Discussions reveal a recycling company may take occupancy	9,999	11%
2	Vacant		4,999	5%
3 and 3A	APBM Cymru Ltd Jabro Games	Transport Haulage Manufacturers of coin operated Equipment for the Leisure Industry	25,000	26%
4 and 5	Harlech Tools and Engineering	Precision engineers, press tools and developments	4,000	4%
6	Wecori Engineering	Precision Engineering	5,000	5%
7	Hi Glos Auto Valeting	Valeting	755	1%
8	All Wales Ambulance Service	Provides training and other healthcare courses	755	1%
9	All Wales Ambulance Service	Provides training and other healthcare courses	755	1%
10	All Wales Ambulance Service	Provides training and other healthcare courses	755	1%
11	Vacant		754	1%
12	Vacant		754	1%
13	Watts Brick Contractors	Brickwork contractors	750	1%
14	DK Carpentry contractors	Carpentry contractors	750	1%
15	Vacant		2,249	2%
16	IT Buy	Retailer of IT equipment	1,500	2%
17	Pathways	Provides training and advice for people on benefits to get back into employment	1,500	2%
18	Vacant		1,500	2%
19	Swansea Valley Bible Church		4,000	4%
20	Aquazone	Engineering Solutions for the Water Industry	4,000	4%
21	Top Pops	Wholesalers of Soft drinks	25,000	
		Total	94,775	

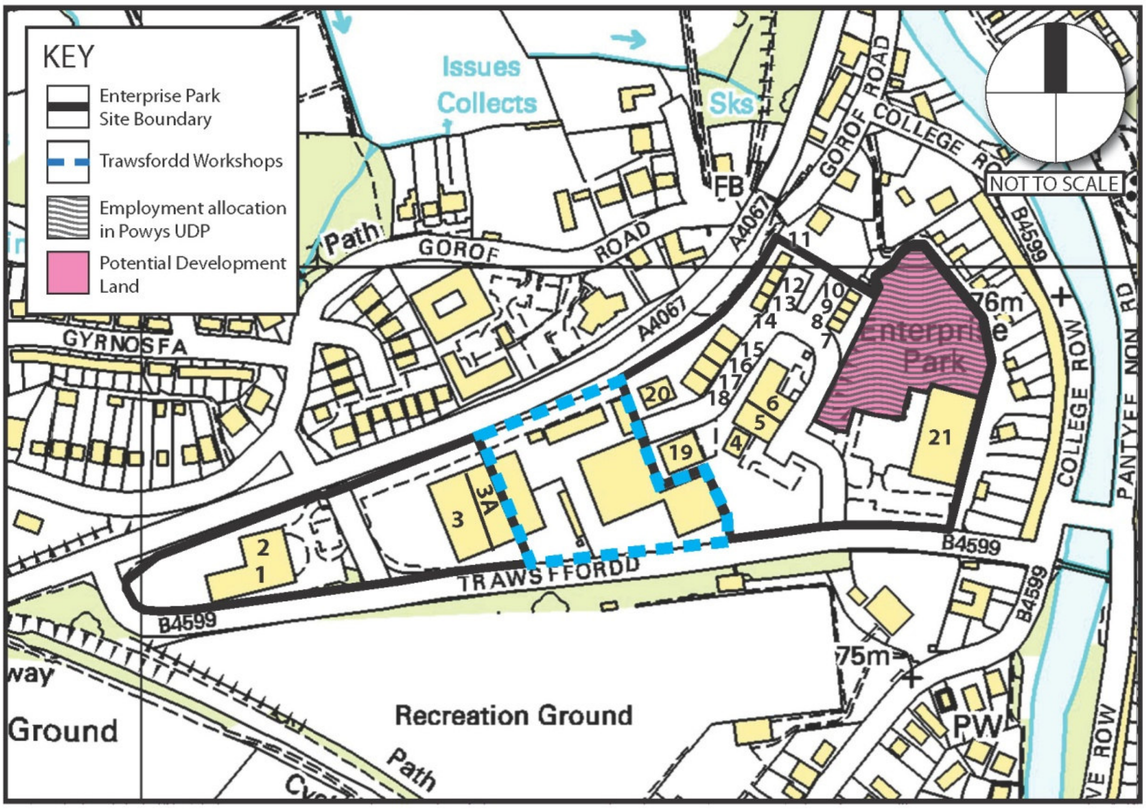


Figure 3-4 Ynyscedwyn Enterprise Park

Vacancy

There are currently six vacant units out of a total of 21 units, which gives a vacancy rate of 29%. Spencer Properties have however confirmed that unit 1 is now under offer and they expect it to be occupied shortly by a company with a form of recycling use. Unit 1 is one of the larger units on the estate at 9,999 sq ft, and if unit was occupied, the percentage of vacant units by way of total floor space would be about 11%. This figure is around average for this type of estate, particularly given the current economic conditions.

Discussions with Spencer Properties suggest they are fairly pleased with the performance of the estate. They confirmed that there is a turnover of tenants with the smaller units, though the larger ones in excess of 1,500 sq ft usually reside for in excess of 3 years. The larger vacant unit (Unit 1) has taken about 12 months to let, although unit is now under offer, and consultation with Top Pops reveal that they were interested occupying this unit. There is a reasonably steady demand for the smaller units of less than 1,500 sq ft on the enterprise park. And in the last year they have let three of these smaller units. However discussions with the letting agent reveal that units 15 and 18 require substantial internal improvements before they are likely to be let.

The Enterprise Park has a high density of development, and there is limited opportunity to extend any existing units. That said the land to the rear of Top Pops (0.7ha) which is in the company's ownership is a development opportunity and is allocated for employment purposes in the Powys UDP.

Quality and Attractiveness of Units

The enterprise park has a high density of development, and although there is only a limited amount of open space, there are forms of soft landscaping (comprising small trees and plants) which improve the attractiveness of the area.

The units on the estate are all in a generally good state of repair and are well maintained. The majority of the units are relatively modern and probably date from the mid to late 1980s. The general construction of these is of steel frames, clad with plastic coated profiled steel sheets. Some of the units have rolled eaves and they mostly have a small number of windows and a sectional type loading door. The units in the middle part of the estate which are not owned by Spencer Properties are mostly older and a number of them are clad with asbestos cement sheets. Even these though look quite presentable and it would be a relatively inexpensive job to over clad them with steel sheets.

The unit occupied by Top Pops looks relatively modern and is quite imposing. It is set within its own landscaped site and has a large office element at the front of the unit overlooking the site entrance and car park. This gives the property a certain presence and the feel of a headquarters type building rather than just another industrial unit. The landscaping is complemented by the landscaping on rest of the estate which is all in good order and well looked after.

Ownership and Leasing

Spencer Properties own all of the units on the estate which are available leasehold and consultation with the estate suggest that the remainder of the units are owner occupied. In terms of the total floor area of the estate, about 40% of it is owned by Spencer Properties and this comprises 14 units totalling about 28,000 sq ft.

Spencer Properties use Roland Jones and Partners as their letting agent, and discussions with the agent reveal that Spencer Properties have a realistic view when marketing and letting the smaller units and accept that the tenants will often be small businesses with no real trading history. They will accept short term leases for a minimum period of one year and generally achieve an annual rent which equates to circa £4.50 per sq ft. Discussions also indicate that it is not easy to find tenants for the larger units, and Unit 1 which is now under offer has been quite a difficult unit to market. Added to this, the ingoing tenant will be paying an annual rent which equates to £2.00 per sq ft, which is considered to be below the level expected for a unit of this type, which reinforces the fact that it is difficult to secure tenants in the larger, older units.

The rent paid by tenants is exclusive of any other outgoings and in addition they have to pay business rates, water rates, electricity and a service charge which equates to 12.5% of the annual rent. All rents are subject to VAT.

Market Demand Assessment

Discussions with the letting agents confirmed that they have a relatively steady flow of enquiries for the smaller units of less than 1,500 sq ft, but fewer enquiries for the larger units. The majority of enquiries for the smaller units are from locally based individuals or businesses, whereas the interest for the larger units comes from further afield and is very often as a result of a general enquiry to their office rather than from someone specifically looking for a property in Ystradgynlais.

A total of seven businesses responded to the occupier survey, and of these there was a mixture of businesses who own their premises (2 businesses), were on a leasehold agreement (3 businesses), and on licence (2 businesses)

Four out of the seven businesses indicated that they have been established at the enterprise park between 1-3 years.

All of the respondents use part of their floor space for office use. Three out of the seven businesses dedicate between 1-20% of floor space for office activities, another 2 out of the seven respondents dedicate between 21-40% of floor space for office activities, with one out of the 6 respondents dedicating 41-60% of their floor space for office activities. This would suggest that the enterprise park has an important role in providing office space for businesses.

In terms of business growth, 5 out of the 7 respondents consider their premises to be suitable for their ongoing business needs. However 6 out of the 7 respondents anticipate they will expand over the next 10 years. Whilst all of those business planning to expand anticipate they will take on 1-10 full time staff, and some part time staff, only 2 out of the 7 respondents said that they anticipate their expansion will result in the need for additional floor space. The results show that this would be quite modest expansion (less than 1000 sq ft of additional floor space).

In terms of relocation, 4 respondents indicated that they have considered relocating from their current premises, and 3 respondents have considered relocating elsewhere in Ystradgynlais. With regard to the amount of floor space they would require if they relocated, one business indicated they would need 1000-2000 sq ft, and two businesses reported that they would need a floor space of 6001-10,000 sq ft. When asked if the type of premises they require is available in Ystradgynlais, the business who required 1000-2000 sq ft did not think it was. Our research suggests that there is availability of this size premises, as such it could be that this information is not available to businesses.

Key Findings and Challenges

- It is much more difficult to let the older and larger units due to their condition with two of the older units require substantial improvements before the Letting Agent thinks that they will be let

- A few simple improvements that could be made to the estate would be to clean the cladding and brick work on some of the units where it is stained and also to potentially consider over cladding the older units with steel sheets, which would modernise the appearance of these units.

- Target marketing for larger properties, this can be achieved jointly with other estate owners

- Limited expansion opportunities, although available allocated employment development land at Top Pop’s, but this is privately owned and there are aspirations for alternative uses

3.4 Trawsfordd- Workshops

Location

The Trawsfordd workshops are situated in the centre of the Ynyscedwyn Enterprise Park and are contained within its own site boundary.

Description of Business Park

The workshops are owned by Powys CC and in the main provide premises with small floor space. The aim of the workshops is to provide small workspace areas on a flexible basis, to encourage new business start ups and allow them to grow and develop, and following this they will be ready to move into larger workspaces, freeing up the small workshop units for new business start ups.

The workshops accommodate 56 units and accommodates a total of 54 businesses (some businesses occupy more than 1 unit), which are varied in nature. Common uses of the workshops include use as office bases for tradesmen (plumbers, carpenters, builders)- 23% of the workshops are used for this purpose. The workshop units also accommodate theatrical productions and media, landscaping business, airport travel business activities. A list of all of the business, together with floor plans showing the internal layout and unit numbers of the workshops are shown in Appendix A.

Table 3-5 shows the number and percentage of types of business activities within the workshops.

Table 3-5 Categories of Businesses within the Workshop Units

Type of Business	Number of Units	% of Units
Light/production	5	9%
Office base for tradesmen	13	23%
Retailing- clothes, accessories, make-up	7	13%
Storage	14	25%
Other	19	30%
Total	56	

What is notable is that a relatively high percentage of the businesses use units for storage purposes (25%). The workshops are also popular in providing an office base for tradesmen (22%).

Site Details

This site forms part of the Ynyscedwyn Enterprise Park, though it has its own site boundaries, identity and access from the main road. It comprises a total of 56 small workshop units which range from 104 sq ft up to 2,150 sq ft. The total square footage of all of the units combined is circa 32,000 sq ft and the total site area is about 1.1 ha

The majority of the workshops are within three larger buildings which have been sub divided, two of them with the innovative construction of internal access corridors large enough for cars and light commercial vehicles to use. Two of these larger buildings are detached and the third has a common boundary with the property occupied by APM Cymru Ltd. In addition to these three buildings there are three smaller terraces, a two storey office which also has a common boundary with APM Cymru Ltd and also a small suite of ground floor offices which includes the site reception.

Whilst the main buildings that have been subdivided are quite old, they appear to be reasonably well maintained and are in a generally good condition. At some point they have been over clad with steel sheets and whilst we were not able to inspect the roofs, it is assumed that these would also have been over clad at the same time. Some of the larger units have a small roller shutter door while the smaller ones just have a personnel door. There are common toilets on the site as individual units do not have their own toilet facilities.

Of the three smaller terraces two are purpose built and comprise a total of 12 small units. They have rolled eaves and the units have a small roller shutter loading door and some forecourt space to the front, together with communal toilets. The third terrace comprises more small units all of which have a roller shutter access door and whilst the building itself is quite old it is in a good general condition.

Vacancy

The estate has full occupancy together with a waiting list (at the time of the survey) of 36 people who have enquired about future availability, although some of these enquiries are from existing tenants wanting to swap their existing premises with other premises or relocate within the workshops. To achieve full occupancy on any multi occupied estate is quite an achievement and to maintain this level of occupancy together with a waiting list is rare. This can partly be explained by the fact that many of the units are very small and small units are always in limited supply as they are relatively expensive to construct and are very management intensive. Out of the total of 56 units on the estate 38 (67%) are smaller than 500 sq ft. Whilst there are other small units available in Ystradgynlais, there are none available of less than 500 sq ft on the other main estates.

Other reasons which could be attributed the high level of demand is the fact that the estate is obviously well managed and maintained, the flexibility of the terms of occupation, and also the occupational costs are very competitive when compared to other estates in the area.

Quality and Attractiveness of Units

The main buildings on the estate are quite old and they have been adapted for their current use. Despite the fact that they have been over clad at some point they are still elderly buildings and whilst they are functional, they are not particularly attractive. The units that adjoin the building owned by APM (Cymru)Ltd seem to be in the poorest condition and most in need of refurbishment particularly externally. The newer purpose built terraces have a more modern appearance though are showing signs of wear and would benefit from a general refurbishment and overhaul.

The actual workshop units themselves are very basic and really offer only the minimum of facilities. As already mentioned they do not have their own toilet facilities, some of them only have a personnel door and the units which are accessed from the corridors have very limited loading access. Parking might also be an issue for certain types of businesses and uses and with many of the workshops it is not possible to park in the immediate vicinity of the unit.

There is a noticeable lack of any landscaping on the estate and if some were to be introduced this might help to give the site a slightly softer and more pleasant feel. The site has relatively high site coverage and there are not many places that landscaping could be introduced, without potentially interfering with the vehicle circulation and parking.

Ownership and Leasing

All of the units on the site are owned by PCC and they are available on a leasehold basis. The council take a flexible approach to this and uses a standard licence agreement which either side can determine at a months' notice. Rent is payable monthly in advance and one month's deposit is also required. The amount paid includes business rates, water rates, building insurance and external repairs as well as the rent. We have looked at the rental levels for a number of different units and these range from circa £3.00 per sq ft for the larger units up to £6.25 for the smaller units. This is however a gross rent and when deductions are made for business rates, water rates and insurance, the net rentals for the same units is circa £1.95 per sq ft and £5.34 per sq ft

It is considered that these rental levels are very competitive particularly for the slightly larger units and they no doubt help to keep the units fully occupied. The rents charged are not subject to VAT and this again is a very significant factor for small businesses who are not VAT registered

Market Demand Assessment

Due to the full occupancy, there can be no doubt that there is a strong level of demand for these particular units.. It emphasises the comments made by NPTCBC that there is always demand for small units of 500 sq ft and also for the relatively good take up of the nearby 750 sq ft units owned by Spencer Properties.

There is no obvious reason why this level of demand for the units might decrease in the future if the current rental levels and management structure and policies remain in place. It is considered that it should be possible to increase the occupational cost of units by the occupiers, without having a dramatic impact on the occupancy levels.

A total of 8 out of 54 businesses responded to the occupier survey and only broad conclusions can be drawn from the survey. The response rate was affected at the time of the survey by the anxiousness of tenants to the impacts of proposed changes by PCC to the staffing and management of the site on their rents and leases.

Out of the 8 respondents, 6 indicated that they occupy less than 1000 sq ft, with 4 of these respondents occupying between 401-600 sq ft of floor space. Out of all of the respondents, three said that they use their floor space for office activities, and four respondents indicate that they use between 60-100% of their floor space for warehouse/storage.

The results show that the majority of businesses tend to employ a smaller number of staff (6 respondents indicated they employ 1-5 full time staff)

Two respondents reported that they spend 0-5% of their turnover on accommodation, whereas two respondents indicate they spend 31-50% of their turnover on accommodation. Half of the respondents rate the accommodation as good value for money, and the other half of respondents consider it to be fair value.

6 out of the 8 respondents said that their current premises are not sufficient for their ongoing operation. The highest number of respondents (5 respondents) indicated the main reason for this is that their site/premises are too small, and 2 respondents indicated that the premises are too old/in poor condition. This could suggest that these businesses have outgrown their current premises, and are at a stage where they require larger and more modern premises to harness their development.

5 respondents reported that they are planning to expand their business over the next ten years, but only two respondents indicated this would result in the need for additional floor space.

Four respondents report that they have considered relocating from their current premises, and two of which report that they have considered relocating elsewhere in Ystradgynlais (two of which would prefer to a dedicated industrial area).

A number of reasons were provided for why respondents have considered relocating from their current premises. :

- High business rates
- Sites/premises too small
- Premises in poor condition/outdated

When asked if the premises they require are available in Ystradgynlais, three respondents answered. Two businesses indicated premises they require were available and one business indicated that it was not.

Key Findings and Challenges

- Good variety of small workshop units
- Full occupancy and long waiting list indicates very strong demand exist for the estate
- Flexible terms and very competitive terms in context of the local market
- Low levels of occupier turnover with some units taken up by business expansion on site rather than potential relocation off site to purpose built larger units
- Very basic units, some without basic amenities, and loading is often restricted
- A high % of units are being used for storage
- Popular as an office base for tradesmen
- Potential to increase rents without reducing occupancy level significantly
- Limited expansion areas

3.5 Caerbont Enterprise Park

Location

The enterprise park is situated to the northern fringes of Ystradgynlais town. To the west of the site (on the other side of the A4067) is a small residential estate and to the north a free standing industrial unit landscaped in its own grounds (Nortons- transport haulage). To the south of the site are some premises used for employment purposes, and to the east a heavily wooded area.

Description of Business Park

The enterprise park is dominated by two businesses which both specialise in the manufacture of automotive instruments. They occupy the large factory type unit to the north of the site, which measures circa 38,000 sq ft and occupies 50% of the total floor space within the enterprise park. The terrace of large workshop units to the south of the enterprise park have for a long time stood empty, however a motorcycle breakers business moved into the end unit in September 2009.

Table 3-6 presents key details about the businesses within the park and the amount of floor space they occupy. **Figure 3-5** shows the layout of the units within the enterprise park.

Table 3-6 Businesses in Caerbont Enterprise Park

Number on Plan	Name of Business	Nature of Business	Amount of Floor space (sq ft)	% of floor space
1	Caerbont Automotive Instruments Speedy Cables	Design and manufacture of discrete car instruments, instrument clusters, senders, electronic control and interface modules and wiring harnesses for the specialist automotive and industrial markets Speedy cables are manufacturers and suppliers of automotive instruments	38.000	50%
2	Vacant		6,076	8%
3	Vacant		5,171	7%
4	Vacant		5,177	7%
5	Vacant		5,171	7%
6	Vacant		3,918	5%
7	Vacant		5,796	8%
8	Bugs Bike Bargains	Motorcycle breakers	7,088	9%
		Total	76,397	

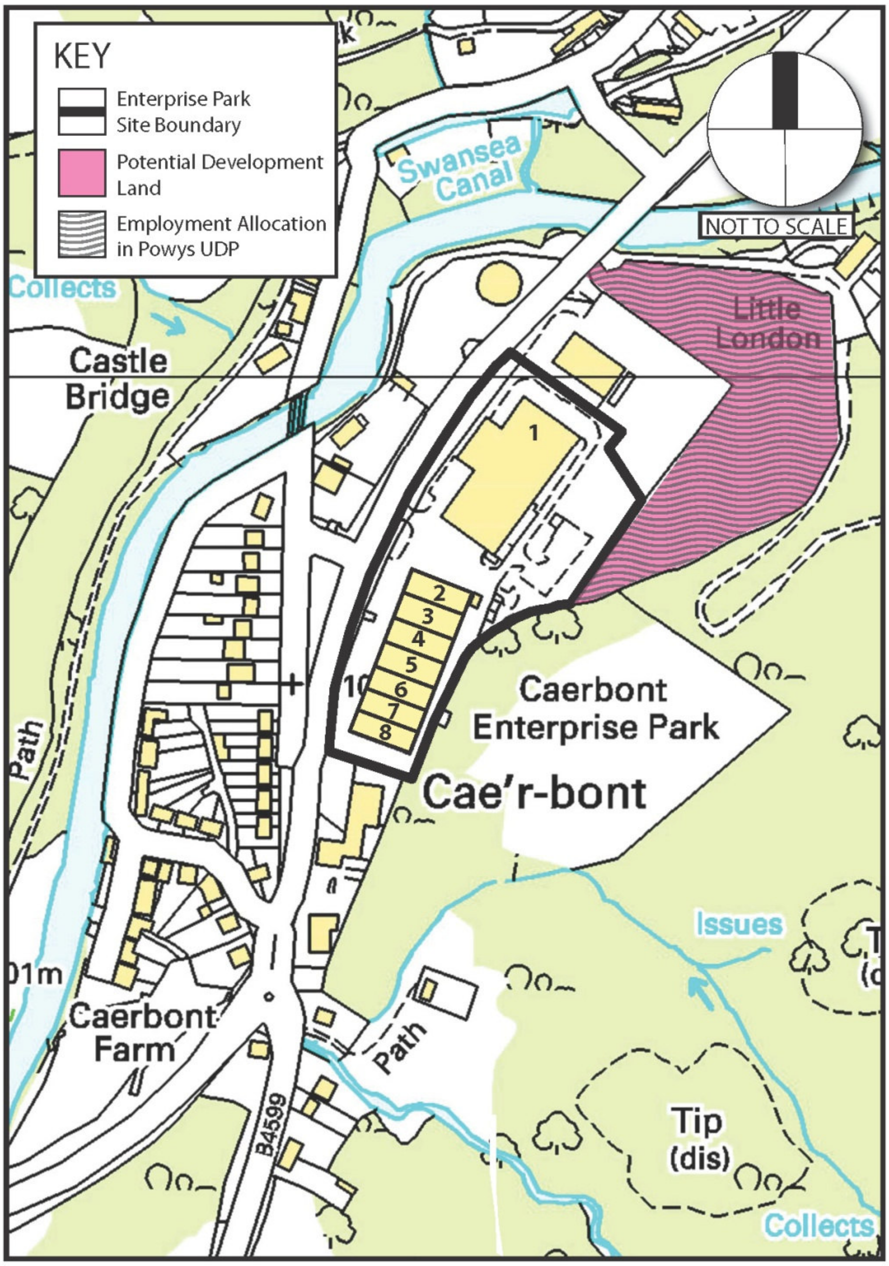


Figure 3-5- Caerbont Enterprise Park

Site Details

The site comprises two quite elderly industrial buildings situated on a self contained site of approximately 2.1Ha. Both units measure circa 38,000 sq ft each and comprise three main bays. The majority of the site is surfaced and there is well established landscaping to the perimeter. The site has frontage to the main road, though due to the density of the landscaping visibility from the main road is limited.

The building situated to the north of the site is occupied by Speedy Cables and Caerbont Automotive Instruments and it is understood that these two companies are operationally linked. The building to the south of the site has been subdivided at some time and now comprises a total of seven self contained units ranging from 3,918 sq ft up to 7,088 sq ft. Both of the buildings look dated, although the building that has been sub divided has been modernised to an extent with the use of some newer cladding, coloured doors and painted walls.

The subdivided units face the front of the site and they all have their main accesses and reception at this end. Some of them have a loading door at this end, while others have the loading door at the back of the unit. There is not a great deal of circulation space around the units and car parking is limited to the front of the site. The road to the rear of the units is quite narrow and could potentially be blocked with larger vehicles stopping to park or load or unload. In terms of extending the site boundary to allow for a wider circulation space to the rear of the units, discussions with Planning Officers confirm that as the site is situated outside the development boundary and would need to be promoted as part of the future LDP. This land is wooded and there may be ecological constraints, although this would require further investigation.

All of the units in the block are fairly similar in size and shape and are considered to be quite large for such a location, and there is low demand for them. A constraint associated with the units is that they have limited height under the eaves which means that the height of the loading doors is restricted. Combined with the limited circulation space, it is considered that this makes it unattractive to potential tenants. Consultation with the owners, Spencer Properties confirms that they have no immediate plans to invest any money on the site or to undertake any further improvements to the buildings.

In terms of potential development land, there is limited availability within the enterprise park boundary, unless the large workshop units were demolished and redeveloped. The Powys UDP allocates 1.5 ha of land adjoining the north eastern site boundary for employment purposes, which could potentially be used as expansion land.

Vacancy

This enterprise park has the highest vacancy rate out of all of the business parks in the study area. Six out of the eight units are vacant providing an occupancy rate of only 25%.

Overall there is circa 31,309 sq ft of vacant floor space within the enterprise park, which equates to 41% of the total floor space.

Of the seven units owned by Spencer Properties, six of them are vacant and have remained so for some time. Consultation with Spencer Properties and the letting agents both confirmed that it is difficult to let units on the site and it is understood that the units have never been particularly popular with occupiers, even when market conditions were more favourable than they currently are. Spencer Properties estimated that on average they have about one enquiry per month for the units, either direct or from their letting agents. The units are being offered at a quoting rent of £2.00 per sq ft per annum which is in our view a competitive level and should not discourage tenants from taking units. As well as the competitive rental levels, it is understood that Spencer Properties take a flexible approach to the terms of any tenancy and will consider fairly short term arrangements

Discussion with the letting agent (Rowland Jones and Partners) confirmed that enquiry levels for the units are limited. They reported that last year they agreed a short term letting to a company from Baglan who wanted some extra storage space for six months, and more recently they have received some interest from a company who wants to open a gymnasium in one of the units.

It would seem that there are a number of reasons as to why the units are proving difficult to let, which include: the location (which is a little remote); all of the units are of a similar size (which is not popular). Units are quite low and have a potentially restrictive loading door height of 3 meters, and there is limited space within the site for parking, loading, yards and circulation.

Quality and Attractiveness of Units

The site as a whole looks reasonably attractive and well presented, though this is mainly due to its pleasant surroundings and the quality of the onsite landscaping. The buildings on the site are quite old and Unit 1 (Caerbont Automotives and Speedy Cables)in particular is not well maintained and appear to have been deprived of any investment for many years. The unit is clad with asbestos cement sheets, which makes the building look very dated.

An attempt has been made to modernise the other building on the site which has been subdivided. Whilst it still looks dated, it looks reasonably presentable and this has been achieved with the use of more modern looking steel cladding, some fresh paint and the introduction of some different colours to distinguish the different units. The shape of the actual units though is not ideal and they are quite long and narrow. The eaves height is quite low at 3 meters and this restricts the height of the access door and also limits the amount of space that can be used internally, as for example it would not be possible to rack them to any great height. Some of the units also have internal columns which potentially make the space less useable. The roof lights are badly stained and need replacing and this makes the units quite dark internally. It is also questioned whether there might be potential difficulties with fire escapes due to the depth of the units and which might apply in particular to the mid terrace units, although this would need investigation by a building surveyor.

Ownership and Leasing

It is understood that that Unit 1 is owned and occupied by the occupiers Speedy Cables and Caerbont Automotive Instruments. The other units on the site which are owned by Spencer Properties are available to let. They are marketed direct by both Spencer Properties and also Rowland Jones and Partners and Clee Tompkinson Francis (as letting agents). The current quoting rent is £2.00 per sq ft per annum which has been reduced from £2.50 per sq ft in order to try and attract more tenants. Discussions with Spencer Properties reveals that they take a flexible approach to the form of the lease and are prepared to consider short term lettings of less than 12 months.

In addition to the rent, tenants are required to pay a contribution towards the site service charge, buildings insurance, all utility services and business rates.

Market Demand Assessment

Due to the number of empty units, it can only be concluded that there is not a great deal of demand for these units as they are currently configured. Consultation with a number of local agents who have had an involvement with the site over the years indicates that it has always been difficult to let these units, and this is not a recent phenomenon that can be explained by current market conditions. The units are being offered at competitive rentals and on flexible terms, so this again does not explain the lack of occupiers.

It is considered that the most significant contributing factor to the unpopularity of these units is their relatively large size- . They all range from circa 4,000 sq ft up to 7,000 sq ft- which are considered to be quite large for such an area. The main demand is clearly for small units of less than 1,000 sq ft. It is hard to see demand for the units increasing in the future unless the issue of size of individual units is addressed first.

One business responded to the occupier survey. The business which occupies the larger workshop unit (Unit 8) indicates that they consider their premises to be poor value for money. Despite this, they report that they have not considered relocating elsewhere and consider the premises to be suitable for their ongoing operation. Also, they anticipate expansion over the next ten years which will result in the need for 7,000 sq ft of additional floor space, and report that this growth could be accommodated through more intensive use of existing space, refurbishment, and through taking occupation of the adjoining workshop unit.

Key Findings and Challenges

- Lack of demand for workshop units
- Workshop units are too large to match local demand
- Poor circulation and car parking around the workshop units
- Rental levels on larger workshops have been reduced to incentivise occupation
- Need for small expansion area to the east to accommodate improved circulation space and enhance redevelopment opportunities for the units.

3.6 New Developments

Tesco Store- Former Lyle Ladders Factory

A planning application for a new Tesco store, petrol filling station, and associated car parking, together with 10 business units and associated car parking on the former Lyte Ladders Factory site has recently been approved.

The application site area (3.9Ha) is shown in Figure 3.1, and immediately adjoins the Woodlands Business Park. The application shows the retail store with a floor space of 4,469 sq. m, and 10 business units each with a footprint of circa 140 sq ft.

SA9 Skills Centre

The SA9 Skills Centre at Trawsffordd is proposed by PCC, Ystradgynlais Communities First and its partners to establish a sustainable community enterprise which will provide skills training in order to create increased labour market participation, progression opportunities as well as community regeneration. It is a strategic and advanced proposal to provide skills based training and vocational mentoring for communities of the Upper Swansea, Amman and Dulais Valleys and would help to tackle the key issues of deprivation and economic inactivity in the area. The proposals seek to increase local participation in vocational courses and employment skills mentoring, whilst increasing the confidence and the skills of the area progressing into employment, further training and education. Components of the centre will include construction skills, workshops, training and mentoring studios. Courses will be vocationally based, accredited to OCN, including construction skills, office/IT, health and beauty. Third party providers such as Remploy, A4E and other statutory providers should be accommodated, as well as adult education courses and the new 14-19 curriculum provided by secondary schools.

The proposal presents opportunities to integrate complementary actions proposed to tackle barriers to enterprise and employment, such as including a crèche/child care facilities, with improvements to the Workshops as a focal point for encouraging start up and small businesses.

4 Supply Analysis

The supply side issues have been addressed in detail in the review of business property set out in Section 3. A summary is set out below.

Types of property

There are 5 established employment sites located within Ystradgynlais providing approximately 110 units and 332,577 sq.ft of floor space. Collectively these sites and buildings cover the more traditional employment sectors and the local market. However within the portfolio there are a range of different types and quality of units which cover particular market requirements and sectors.

The sizes of estates are mainly of the order of up to 15-20 acres (6-8 hectares) and provide for general and local employment. This type of property has been a traditional focus in Wales for the former WDA and local authorities. The public sector continues to be the primary provider of property in Ystradgynlais with ownership of three of the five estates located at Woodlands, Gurnos and Trawsfordd. Apart from occupier owned property on the Woodlands and Ynyscedwyn, the private sector (Spencer Properties) own two sites at Ynyscedwyn and Caerbont, both of which were previously developed by the public sector. Market values indicate it would be expected that the public sector will continue to act as the catalyst for new developments in the future, whether they be on a supply or demand led basis. Consultations with WAG officers have indicated that they anticipate a continued role in taking a lead in developing new property in the future when existing estates become fully developed and occupied.

Table 4-1 provides an overview of the type and quality, and target market for each of the employment sites. The quality of the site and units is given a broad grading which is set out in the key below.

H	High
M	Medium
L	Low
P	Poor

Table 4-1- Overview of the Type and Quality, and Target Market

Location	Site Type	Site Quality				Building Type	Building Quality				Target Market
		H	M	L	P		H	M	L	P	
Woodlands Business Park	General Employment Site		☑			Industrial/Light manufacturing Offices	☑				Mainstream manufacturing/General services
Gurnos Industrial Estate	Local Employment Site			☑		Industrial/Light manufacturing	☑				Mainstream manufacturing/General services

Ynyscedwyn Industrial Estate	Local Employment Site		☑			Industrial/Light manufacturing		☑			Mainstream manufacturing/General services
Trawsfordd Workshops	Local Employment Site			☑		Workshops			☑		Mainstream manufacturing/General services
Caerbont Enterprise Park	Local Employment Site				☑	Industrial/Light manufacturing				☑	Mainstream manufacturing/General services

Vacancies

It would be unusual to find full occupancy of every industrial property within a localised market such as Ystradgynlais. There are positive effects from having some vacant property as it provides flexibility in the market for businesses to start up, relocate, expand or contract as required. The issue of primary concern is where large numbers of vacancies exist and whether units are hard to let and this can be dependent upon a number of different factors. The most obvious factor is that of size and cost. Other factors though include such things as location, specification of units, attitude/reputation of landlord and the flexibility of occupancy that is being offered to tenants. In some cases there can be a confidence factor involved, and if an estate is well occupied it is often the case that future occupiers are attracted to the vacant units as they become available, as the estate appears vibrant and there is a perception it is performing well and must be a good place to be. If an estate has poor occupancy levels it might appear to potential occupiers that there are problems associated with the estate.

Table 4-2 summarises key findings from Section 3.

Table 4-2 Overview of Vacant Units and Floor space

Location	Vacant Units % (Jan 2009 survey)	Vacant Units % (Jan 2010 Survey)	Vacant Floor space % (Jan 2010 survey)	Reasons for Vacancies
Woodlands Business Park	6	6	3	High Occupancy
Gurnos Industrial Estate	40	30	36	Lack of demand for the large workshop units
Ynyscedwyn Industrial Estate	25	29	22	Lack of demand for the large workshop units A couple of the smaller units are reported to need substantial internal improvements before they will be let.
Trawsfordd	0	0	0	Full Occupancy

Workshops				
Caerbont Enterprise Park	88	75	42	Lack of demand for the large workshop units

The analysis identifies that the occurrence of vacant units are only an issue on two of the five estates. It is significant that vacancy levels are lowest on the Woodlands and Ynyscedwyn estates where there are a larger proportion of owner occupied units. This is partially explained by the evidence that tenanted units are more likely to become vacant over time and owner occupiers often remain in a property for longer periods than a tenant in the equivalent property and are generally more settled.

The table shows how the number and type of vacancies on the Gurnos Estate have reduced since a survey undertaken in January 2009 although two of the larger units (2,500 sq ft) remain empty. While the other two units of this size are occupied, it is only on a temporary basis. With a quoting price of £3.20 per sq ft for the larger units, which in is not considered to be prohibitive, NPTCBC could not identify any real reason why these are proving more difficult to let compared with the smaller units, other than lack of demand and it is both impractical and expensive to sub divide these units to make them smaller. Findings from the occupier surveys suggest that the estate has an important role for the aspirations of growth for established businesses in the area and some identified the Gurnos Estate as a potential location with available property to expand into when the time is right. A key challenge for this site is the effectiveness of its future marketing and promotion to achieve the success of estates elsewhere in Ystradgynlais.

Vacancies have been a longstanding problem for the Caerbont Enterprise Park. The buildings are approaching the end of their economic lives particularly because they have been subdivided from a larger building and the shape and configuration does not meet modern standards and requirements demanded by the majority of occupiers. The building is also old and looking quite dilapidated. Out of all the estates in the area, this one seems to be the most difficult to let and in need of the most investment. Lambert Smith Hampton, a previous letting agent for Spencer Properties) confirmed that it was always difficult to get occupiers to consider the site, even in better economic times and the view is that the estate will always struggle with voids. They said that the one sector that had shown interest in the estate over the years was from garages/car repair users, who could not get onto more modern estates in the area. Consultation with officers from DE&T who are familiar with the site when it was owned by the WDA and they have confirmed that the units on the site have always proved difficult to let.

In addition, there are other sites located in Ystradgynlais occupied by single properties, some of which remain vacant, that can contribute towards the overall business property offer for the area. Notably, the former Remploy premises are a large site that provides an opportunity for a range of small and medium sized business or single larger business. Currently, the Volunteers Centre has a short term tenancy of the site.

Future Development Sites

Section 2 identified there are 5 sites located within the Ystradgynlais area which are allocated for employment development in the Powys UDP or in the case of the Gurnos Estate are available for employment . The total amount of employment land including the expansion land at Gurnos is 6.9ha. The recorded take up of allocated employment and since 2007, since when a total of 1 ha of the Woodlands Business Park has been developed suggest there is a small demand for new developments and at approximately 0.5ha a year. There is over 12 years supply of employment land in the area, in excess of the 6 year supply required for the remainder of the plan period. Planning policy guidance requires a choice of sites to be available to meet development needs over the period of a plan; however, this analysis does not take into account the quality and availability of individual sites which could limit the total amount of employment land realistically available.

Recent proposals will also have an impact on the levels of available future employment land. Proposals to redevelop the Hendreladus Penrhos site for a new school, if approved and developed would remove 1.0 ha from the supply of land. However, the proposal by Tesco, to redevelop the Lyte Ladders site will provide ten new business units, each of which will have a GFA of approximately 140m^2 (1,500ft^2), providing a total GFA of 1,400m^2 (15,000ft^2) has recently been granted planning consent. The planning consent does not have any conditions attached which require the workshops to be built before the retail store, or put any time limits on when the workshops need to be built by

5 Demand Analysis

The demand context is of fundamental importance to developing the strategy. Essentially, it means that, in sharp contrast to the often supply-based approach of land and buildings provision, the demand analysis informs the type, scale and nature of property intervention which is needed both to respond to known and well-defined market areas in Ystradgynlais and to establish a stronger market presence where the property offer is currently relatively weak.

Current & Future Demand

The fastest growing sectors of the UK economy from an employment perspective are expected to be financial and other services, while the fastest declining sectors are expected to be agriculture, mining and manufacturing. The current economic recession has made predicting future trends more uncertain, however, in the long term primary sources of new jobs in the service sector are anticipated to be financial and business services, other private sector services and government. In assessing future demand, sectors which are currently in decline may also produce project opportunities through rationalisation, relocation or modernisation trends. Examples of sectors include: Semiconductor; Electronics; Automotive; and Distribution.

The analysis of the Ystradgynlais area has shown that, for a relatively peripheral location, the existing businesses provide a broad mix of light manufacturing, engineering, basic trades, packaging, wholesale and services. Both automotive and electrical components are well represented as individual sectors, although there is no evidence that this is as a consequence of any formal clustering activity.

Our appraisal of the market indicates that current and future demand for property will continue from a broad sector base similar to the existing profile of local businesses. Enquiry levels and occupier surveys have indicated demand for a range of small modern units (up to 1,000sq ft) which will support new business start-ups, and trade ups from established firms. Office space is in very limited supply, evidenced by the large proportion of this type of workspace found within traditionally constructed estates such as Ynyscedwyn and the high enquiry levels for modern units on the Woodlands Business Park. Therefore, it can be concluded that an unmet demand exists for property with sizable office content. There is also an expressed need to provide one or two new larger premises to meet the specific expansion requirements of established companies located on the Woodlands Business Park. This demand is included within the 58,000 sq ft of additional floorspace that has been expressed as required by existing businesses in the study area through the occupier surveys. Although some of this demand will be found from improvement to existing premises or may not be eventually required, it provides a strong indication of healthy property needs from within the economy of the study area.

The future market demand will continue to be property led with an appropriate size and quality product attracting tenants from established markets. There are two ends of the scale that should continue to be met; good modern quality light manufacturing/office space and good quality industrial/manufacturing units. Two noticeable areas under represented is the availability of small office units and property appropriate for businesses requiring a trade counter.

Property strategy implications

The main property strategy implications of the market demand review are:

- The quality of the property product is an increasingly important consideration from a demand perspective. In comparison to a similar location, the quality of the product is not holding back the market in Ystradgynlais.

- A broad range in type (traditional and modern) and quality (excellent and poor) of property exists to meet market demand; however, much of the present demand in Ystradgynlais is focused around ready-made, small modern manufacturing and office buildings with lesser demand for larger units.

- A key aspect of the market in Ystradgynlais is to match the ‘trading up’ and expansion requirements of businesses with available or new product.

- The area is considered externally as a peripheral location largely due to factors such as perceptions of distance from major markets and population centres, and not due to a lack of relevant property product other than office accommodation.

- Ystradgynlais does not tend to attract many businesses in some of the key growth sectors, especially in service industries. Although a couple of larger companies in established sectors like automotive and electronics suggest opportunities for business clustering.

- The need for a coordinated approach between estate owners to improve the ‘pipeline’ management of businesses progression from workshops through to small to medium sized units

6 Action Plan

As has been outlined under the previous Sections, the study has provide a detailed consideration of the issues and recommendations to increase occupancy rates, support expansion and investment, tackle under/over provision and identify any need and specification for new units. In this Section the findings have been brought together in the form of a holistic, detailed, and prioritised Action Plan. Such an Action Plan should form the basis for any future bids in order to attain funds/commitment to implement opportunities.

Strategic Objectives

The following objectives have been identified as the primary focus for action going forward:

- Maximising the use of existing property and estates, including redevelopment, upgrading and extension of both sites and buildings.
- Invest in new property development, with a specific focus on meeting the growth strategy of established larger businesses, and which is consistent with market demand and economic and financial viability.
- Support improvements to the commercial management and operation of estates.
- Incentivise the turnover of occupation of smaller workshops to stimulate business growth and investment in property by the public and private sectors.
- Supporting property requirements of established larger employers for stimulating new businesses and retaining investment and jobs in Ystradgynlais;
- Increase cooperation between public and private sector to promote property, support business growth and to maintain and enhance the range of business property

Action Plan

Issue	Opportunities	Role of Private & Public Sector	Resources (£)	Risks	Priority
Trawsfordd Workshops The workshops provide an important economic catalyst for business enterprise in the area, providing a well managed micro workspace for new and small businesses with very affordable rent and attractive lease terms. Occupation levels are high and there is strong local demand for units. However, the workshops are operating at a loss, there is a need to increase income and for investment in improving the building fabric and facilities. A structured and incentive driven approach is required to encourage business to grow and 'trade up' to larger premises elsewhere in Ystradgynlais and to free up space for new small businesses. The disparity between the Workshop and private sector rents, could also be distorting the market by constraining tenant interest in alternative private estates, suppressing rental income and as a consequence limiting investment by the private sector in their property.	**Rents & Lease Policy** Modernise the structure of the rental charges by making them exclusive of business rates. Individual occupiers would then become liable for these and under current legislation and PCC would not be liable to pay the rates on any vacant units. If the rents paid were maintained at their existing level, this would result in the net rents received by PCC increasing by circa 40 – 50 % per annum, subject to the Unified Business Rate (UBR) in any one particular year and subject to full occupancy being maintained. Gradually increase rents for existing tenants to more closely reflect market values. This policy could be implemented over a number of years, once the business rates have been removed from being inclusive in the rent. This would incentivise businesses to consider other accommodation in the area and should help to free up units for new businesses to occupy. The rents charged by PCC are not subject to VAT and this is a major advantage to small businesses who are possibly not VAT registered. Even if the above changes were implemented, a business who did not have to pay unrecoverable VAT would find an incentive and benefit to occupy space at the Workshops site as opposed to other sites in private ownership where they would have to pay VAT	PCC to agree a revise rents and lease policy to more closely reflect the market norm, whilst also still providing incentives to support local economic development.	Minor revenue implications, with changes implemented from within existing PCC management and legal resources. Increased revenue from rents	Objection to changes to rent and lease policy by existing tenants. However, demand for units is strong as evidenced by occupancy levels and the waiting list and similar alternatives do not exist. Opposition could be managed by implementing adjustments gradually for existing tenants.	**High** – to secure viability of the Workshops, to stimulate investment in the properties, to reduce disparities in the local market, and to encourage new business start ups
	Management & Ownership Three options exist: **1.** Retain in ownership and management with PCC with revised rents and lease policy to improve viability, increase investment as well as to continue to provide important accommodation for stimulating local economic development	PCC/WAG to invest in maintaining and improving building fabric. PCC to implement policy of incentivising new business and stimulating local economic development	Capital implications for improvements to estate. This could be offset by increased revenue from rents	Absence of private sector commercial experience and innovation although this could be acquired through consultancy support.	**Medium** **In March 2010 PCC appointed managing agents in line with option 2. Reference to this option in has been kept for consideration should in future PCC revert to previous arrangements**
	2. Private Sector Management - The policy of changing the existing rent and lease structures could be implemented by outsourcing the management of the estate to the private sector. PCC would still need to be involved with the management of this process and for setting out the overall strategy for the asset, though the managing agent would implement the policy and changes. This should prove to be a more cost effective way of managing the site and it will also put some distance between PCC and the tenants. A variation on this option is a joint venture between public and private sectors where private sector also invests in the estate and shares income. This has potential but is less likely in a flat market and particularly for individual sites in isolation as it would not generate sufficient returns. Perhaps if this option is considered it should be package	PCC/WAG DE&T to invest in maintaining and improving building fabric PCC to agree policy of incentivising new business with Managing Agent Without management costs and responsibilities PCC has greater flexibility to innovate and direct resources at stimulating local economic development through combining its property portfolio with fiscal stimulus such as grants and tax relief. Private sector to provide commercial	Capital implications for improvements to estate. This could be offset by increased revenue from rents Potential cost savings for PCC from introducing management agent role	Shared profits between PCC and Private Sector reduce income for reinvestment in property	**High**

	up with a number of estates across Powys to make it more viable.	experience in investment and management			
	3. Sale to Private Sector - this would lead to introduction of rent and lease arrangements more reflective of the open market.	Private sector to invest in maintaining and improving building fabric Private sector to provide commercial experience	Capital implications for improvements to estate. This would be offset by increased revenue from changes to management and rents.	Would remove control from the public sector of an important property stimulus for the local economy.	**Low** – on the basis of maintaining a strong economic development role for PCC in enterprise development and applying incentive such as those relating to VAT are only available to the public sector.
Woodlands Business Park A high quality and thriving estate that continues to attract high levels of enquiries from small businesses. Two of the largest employers have incrementally grown on site through development and expansion into existing property. The need has been expressed by one tenant to relocate to premises which would provide circa 20,000 sq ft of additional floor space to what they currently occupy. In addition several businesses indicate they plan to expand their businesses over the next 10 years. However, the estate is almost fully developed and it may not be possible to efficiently accommodate these needs within the existing site without freeing up occupied property as well as new developments. There is undeveloped land within the site which could accommodate some further business units.	**Expansion** Through DE&T Relationship Managers establish in greater detail the expansion needs of existing tenants and to consider options. Options may include: • Developing vacant area of the existing estate for suitably sized units • Encouraging the relocation of one of the larger business to more appropriate premises(existing or new build) within Ystradgynlais thereby freeing up property and redevelopment space for smaller new and established businesses • Planning study to establish potential to extend site to accommodate larger scale property requirements. Such requirements could be incorporated into the business property proposals for the Lyte Ladders site. Promotion would also be necessary through the LDP candidates sites register. • Study to establish potential for new employment site of equal or better quality within Ystradgynlais. Opportunities include allocated employment sites, Tesco's site and land available adjoining the Gurnos Estate.	Collaboration between PCC, NPTCBC and WAG DE&T to identify development sites and opportunities for expansion in consultation with established businesses	Capital implications for new build. The possibility of selling off the WAG estate to a private investor would release funds for reinvestment in new site/premises.	Slow response to meet expressed demand may lead to relocation of businesses outside of Ystradgynlais and the resulting loss of local employment Lyte Ladders Site – proposals for redevelopment may remove opportunities to integrate the sites with existing business premises. New development on the site should be masterplanned to support growth from within the Woodlands estate.	**High**
Ynyscedwyn Industrial Estate Many of the units are relatively modern and date from the mid 1980's onwards and all of the units on the estate are in a generally good condition and appear well maintained. However, units in the middle part of the estate, which are not owned by Spencer Properties, are mostly older, a number of vacant units are in generally poor condition and a number of them are clad with asbestos cement sheets which may need over cladding.	Improvements to quality of the business units, notably the older and larger premises to achieve higher occupancy levels.	Private sector led investment with possible grant support from PCC/ WAG/WVSRA	Capital implication for improvement to premises. Revenue gain from improved demand and rent levels arising from improvements	Non identified	**Low**
Gurnos Industrial Estate The units are fairly modern and are functional for their purposes; they are well put together and look both modern and functional. The units appear to be well maintained and there are no obvious improvements that could be made to the units themselves. However, the overall attractiveness of the estate is quite poor, as the land surrounding the units is tarmac and used for car parking and circulation, and there is a lack of any soft landscaping- as such the appearance of the estate is somewhat bland.	**Soft Landscaping Scheme** Implement a soft landscaping scheme The development of the adjoining employment land should require a detailed landscape scheme.	NPTCBC	Capital implications for landscaping works	None identified	**Medium**
	Employment land allocation Promotion of adjoining land for employment through the LDP	Local Planning Authority to consider sites employment uses	Through existing officer resources	None identified	**Medium**

There is vacant land adjoining the site that is considered appropriate for future development as an expansion of the estate and this area should be promoted for employment use through the emerging LDP.	candidates sites register				
Caerbont Enterprise Park Vacancies have been a longstanding problem for the Caerbont Enterprise Park. The buildings are approaching the end of their economic lives and the shape and configuration does not meet modern standards and requirements demanded by the majority of occupiers. The building is also old and looking quite dilapidated. Externally, the area surrounding the vacant property has poor circulation areas that would limit the viability of substantial occupation.	Option for redevelopment of this site include: • Extend site eastwards to improve external circulation, and yard space. This requirement could be incorporated as an extension of the adjoining area of allocated employment land identified in the UDP. • Subdividing into 3 workshops the two end units to match the roof alignment. This will create units that reflect local demand for smaller units. • Redevelop the site of the vacant property to create modern business units. This option could be consider together with options for relocating business from the Woodland Estate. • Planning study to consider redevelopment for alternative/mixed uses. • Increased circulation space through extending boundary slightly to the east into the adjoining land and promote this through the emerging LDP	Private sector led investment with possible grant support from PCC/ WAG/WVSRA for capital works	Capital implication for improvement to premises or acquisition of adjoining land to expand circulation areas. Revenue gain from improved demand and rent levels arising from improvements	Future investment by the public sector should be subject to an assessment of employment site demand sustainability considerations. The site is isolated from the town centre, centre of population and local services.	**Medium**
Property Forum There are 4 main providers of business property in Ystradgynlais with a strong representation from the public sector (PCC, WAG, NPTCBC) and Spencer Properties as a private sector landowner. Although all owners are to some extent in competition with each other for tenants and income (although the type and quality of properties are not similar), there is also the mutual benefit for the public sector to collaborate to achieve broader regeneration and economic development objectives for the area. Meetings already take place every 6 month between WAG and PCC officers to discuss issues relating to property in the area, and Spencer Properties have expressed an interest in participating in discussions to share information. There is also the need to share market intelligence and good practice to help overcome the difference in demand that exist between individual estates. For example, the occupancy of the Gurnos estate may benefit from working more closely with other public sector partners. A couple of the larger businesses on the Woodlands Business Park have looked to relocate from their current premises, and one business indicated that the premises they need is not available within Ystradgynlais. As such, it is vital that information on potential premises or other options to accommodate their needs is communicated to these businesses through coordinated information sharing by estate owners.	A forum should be encouraged between property owners to exchange information and encourage referrals to improve the management, the letting of their property and to guide investment decisions. In time, as well as sharing intelligence, the forum could prepare a joint directory of property and undertake other collaborative initiatives to improve information for existing and prospective tenants. The first meeting could be convened around sharing the finding of this study with all main parties. PCC new managing agents should be invited to participate to provide additional external perspectives and support the implementation of initiatives. Once established, the Forum should give consideration to establishing links with adjoining areas. Business property networks could be considered throughout the Western Valleys as a method to create integrated and coordinated public/private property initiatives.	PCC to host first meeting of forum, to be held initially every 3 months. WVSRA to consider establishing similar forums where opportunities exist elsewhere within the Western Valleys based on the experience of the Ystradgynlais model.	Minor revenue implications, implemented from within existing PCC economic development resources.	Commercial sensitivity and competition between landowners may limit participation and impact. However, this should not be a primary concern for the public sector and their support for achieving regeneration objectives	**High**

Appendix A

List of Businesses and floor plans for Trawsfordd Workshops

Powys County Council
Ystradgynlais Enterprise Workshops

Wksp No	Tenant	Type Of Business	Contact	Tel.No
1	Cloths Collections	Second hand cloths to sell	Heather Morgan	01639 845533
2	Arte Marco	Pictures Frame	Ortega Benitez	01639 845674
3	Sweet-Dreams	Storage	Anthony Allitt	07812 424581
4	Edc Patterns	Carpenter	Eurwyn Rees	01639 845588 07971007579
5	Community First	Storage	Tom Addey	01639 845051
6	C.French Covers	Making and Storage Of Pool/Snooker Tables	Craig Davies	07976 834119
7	Marine 16 Ltd	Office & Storage and packing marine business	David White	0797 3917862
8	Kevin Patton	Storage house moving	Kevin Patton	07595842170
9	Merlins Oak	Storage 2nd hand Furniture	Linda Williams	01639 730399 07837 357729
10	Owen Bailey	Storage	Phillip Owen Bailey	07971 341334
11	Firehorse	Theatrical Productions	Denise Francis firehorseproductio	01639 681947

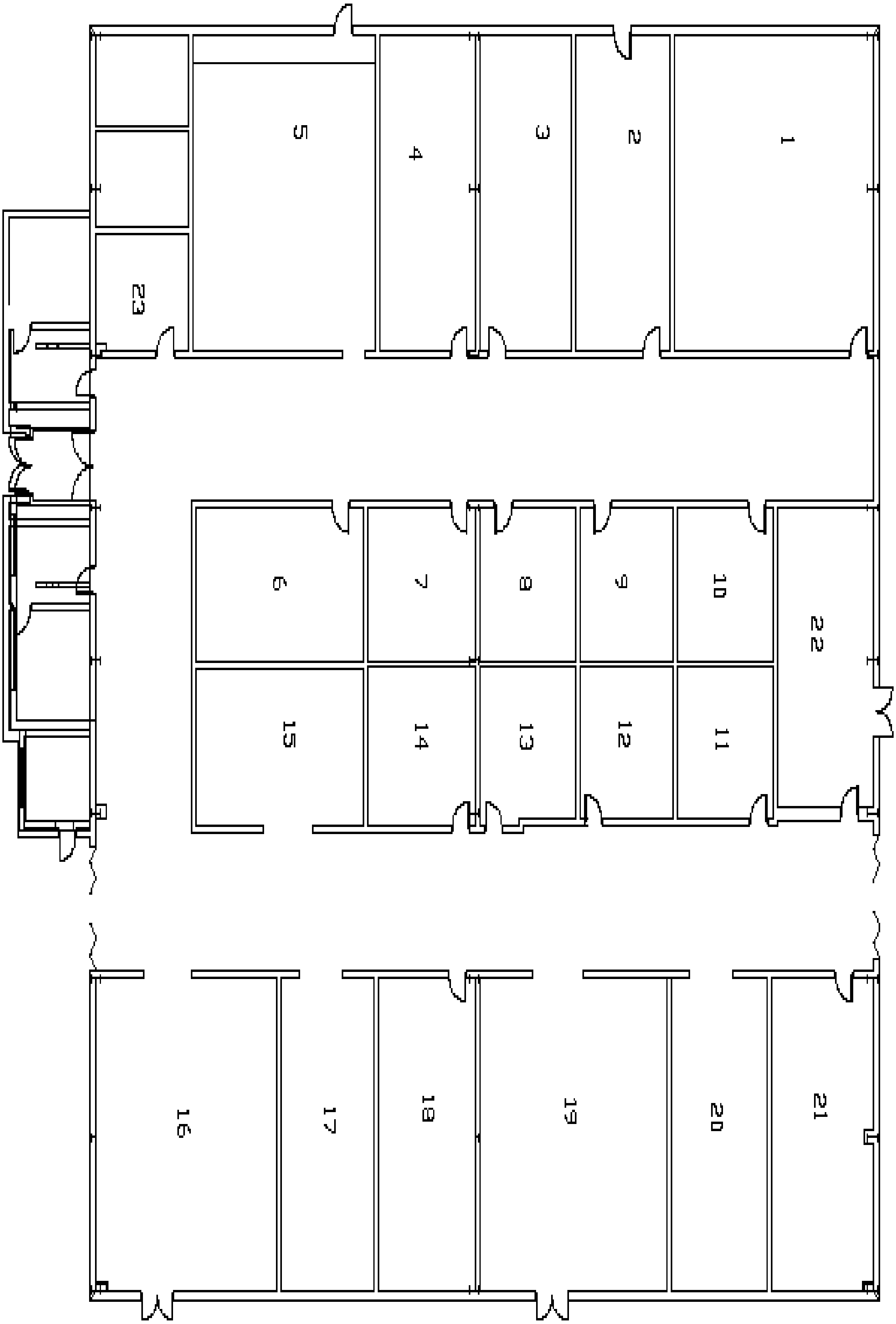
			ns@aol.com	
12	Privilege Travel	Office, airport run	Arwel Bell, Andrew Williams	01639 751039, 07727 223237, 07972 041092
13	TLC Cleaning Services	Office and storage of carpentry business	Tracy Lynne Coles	07771 997 601 843470
14	Probation Services	Repair/Main To Workshops	Nigel Hickey	07812141279 849324
15	Dominic Jones	Restoration	Dominic Jones	01639 830934,07930 889835
16	Healthy Workstations	Office And Production	Gil, Ann Ridley	01639 844500
17	Dartyl Paper Products	Cleaning Products	Justin Evans	841444 849770
18	Reclaimed in Wales	Furniture Stripping	Nigel Horler	01639 843132 07779 704571
19	Clothes Collections	Storage 2nd hand clothes to sell	Heather Morgan845533	See unit 1, 205
20	Creative Driveways	Laying Driveways	Mr. A Jones	01639 842331
21	Glantawe Plumbing	Plumber	Dale Spittle	07971 384799
22	DM Joyner Carpet Fitting Services	Office and storage of carpets	David Joyner	07779 108774
23	Lloyd Roger	Electrician	Lloyd Roger	07950 342937
201	Morgan Entertainment Ltd	Contribution dvd and chocolate fountain	Jonathan Evans	01792 869325
202	Kite Wholefoods	Producing Mayonnaise	Paul Hartland	01874 638049
203	Ystrad Woodstore	Recycling Of woods	Caroline Bull	01639 849192

			(Ystrad Volunteer	
204	BuildproUK Ltd	Training and Storage for home cares business	Darrell See unit 300	07906 318899
205	Cloths Collections	Second hand cloths to sell	Heather Morgan	See unit 1
206	M F Price Plumbing & Heating Services	Plumbing Parts	Malcolm Price	841003, 07971 626887
207	Gavin & Stacey's Café	Canteen	Mark Bennett	845147 07970 350930
300	Caremark Ltd	Office Accommodation See unit 204	Darrell Corry	07906 318899
301	First Strike Welding	Welding	D.J.Richards	01792 862983 01639 849319
302	Glantawe Carpets	Storage	Mr.Joyner	01639 842522
303	Bryncelyn Brewery	Brewery Business	Williams Hopton	01639 849051 w/s 841900
304	FFL Services	Landscaping Business	Nigel Davies	01639 830121, 07977 554703
305	Lord of The Hoard	Book collection And furniture	Paul Gowland	01792 863102
306	RD Plumbing & Heating	Repair & Builder	Ryan Rees	07921 253 889
307	Johnson Hall Services Ltd	Building business Storage	Howard J.Johnson	07770 920569 07855 762102
308	Mike Woods	Storage, restoration	Mike Woods	07973 934048

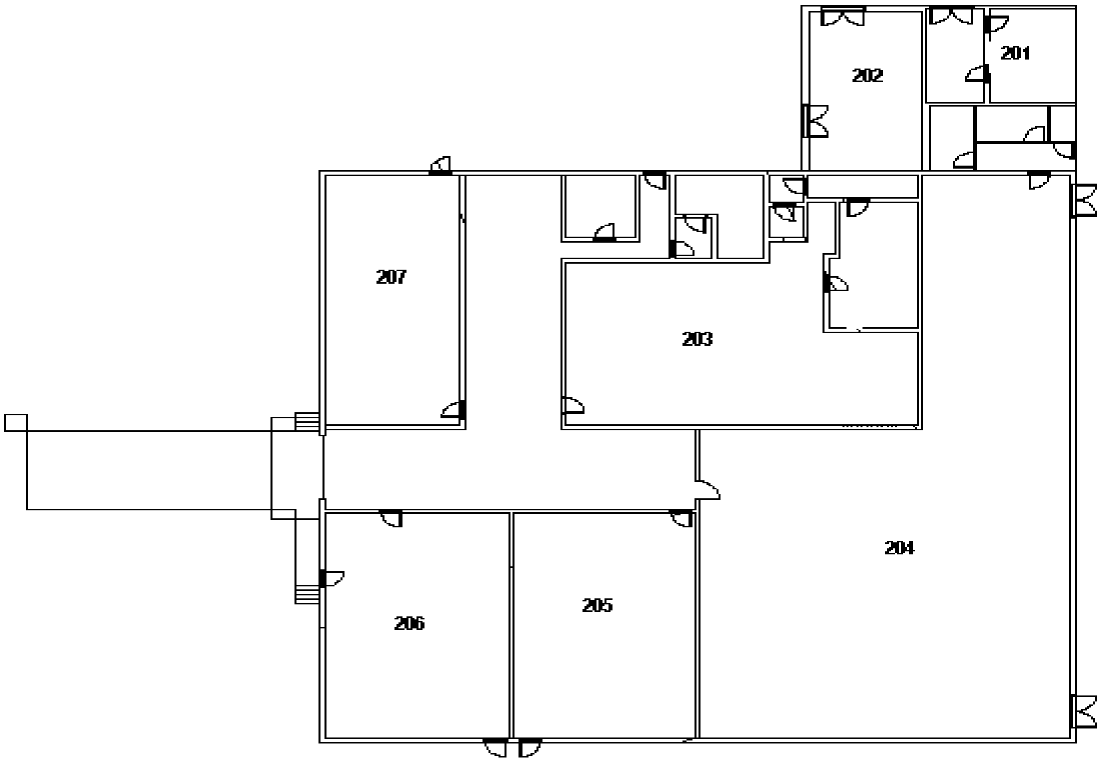
309	Stratex Drilling	Storage	Iwan Brown	01639 730766
310	Choice of Cleaning Ltd	Office and Storage Cleaning window	Simon Tredwell	07905700749, 01639 841481
311	DMJ.Building Services	Storage	David Jones	01639 844762
321	Derek Thomas Builders Ltd	Building Construction	Derek Thomas	01269 831024, 07860 409543
322	Dawn Fresh Flower & Plant	Flower delivery	Terrence E Gibala	07518035322 01269 825030
323	Jopling Access and Rescue Equipment	Light manufacturing	Brian Jopling	01639 730429, 0794006918
324	Thomas the Pop	Storage soft drinks	Mark Weston	01639 842699
325	Contact Electrical Services Ltd	Electrical	Shaun Spencer 831030 w/s	01639 730866 07530 128330
326	E G Tec	Manufacturing Of Plastic Extrusions	Gaby Engel	01639 841012 07799891233
325a	Leatherwise	Leather hand bags	Mr Ian, Penny Thyer	0771 4394509 0771 8572723
325b	Henge Property Development	Building business	Ric Herod	07977 997761
327	No.7	Import handbags & costumes Jewellies	Andy James	01639 849273

328	Chris Cloney	Office and Book Storage	Tracy Eynon, Chris Cloney	W/S 844160
329	Pattern Paving	Paving business	Ifion Morgan	07830005254
330	South Wales Textiles	Clothes collections	Peter Smith	07957 898461
331	Quid in	Misc storage shop	Brian, Lee Roberts	01639 849221 07810 482501
Porta Cabin	Ystrad Media Trust	Media business	Paul Shannon	07958 493457

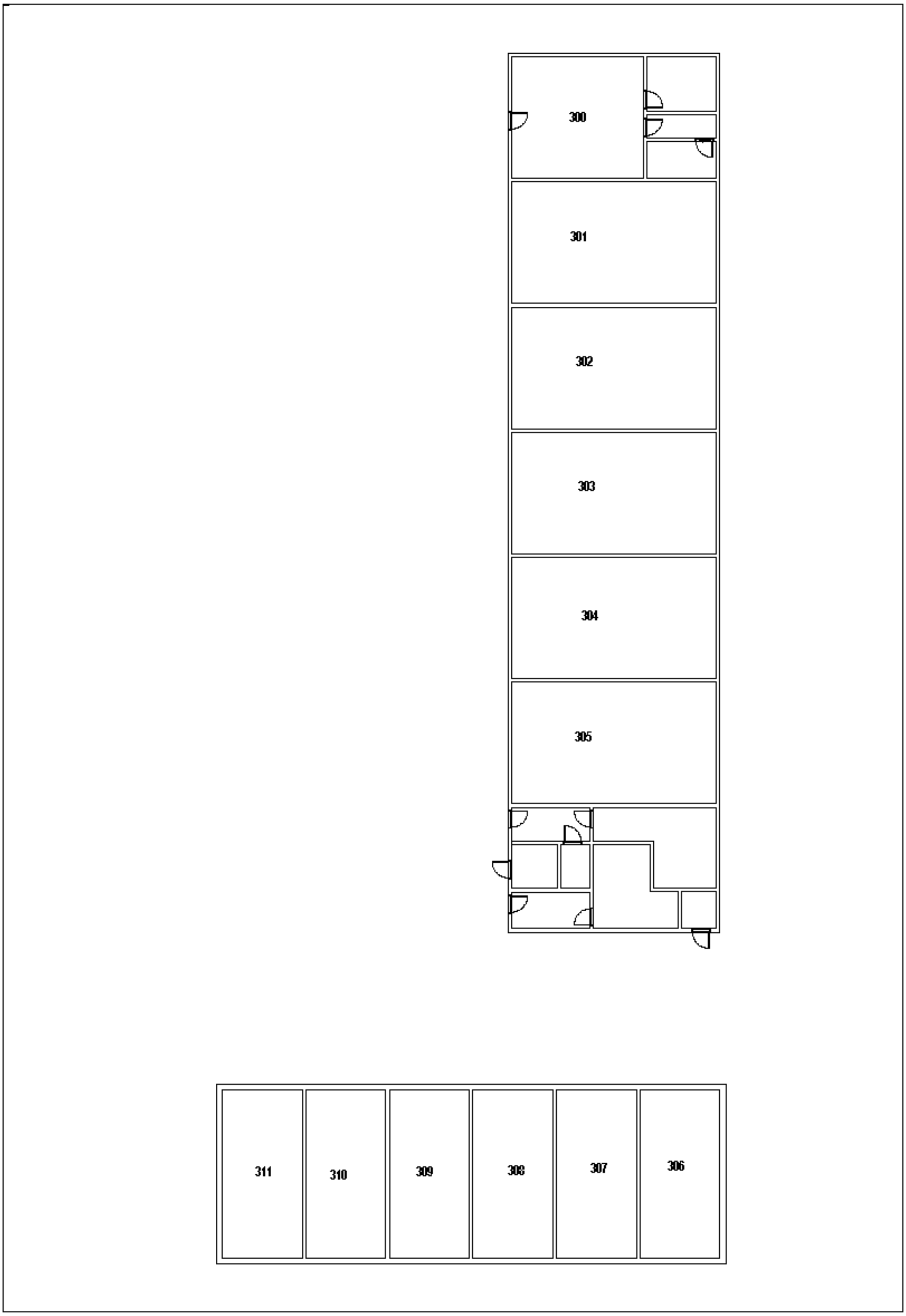
Phase 1



Phase 2



Phase 3



Phase 4