

Causeway Coast & Glens Borough Council Planning Committee

Causeway Coast & Glens Borough Council Local Development Plan – Preparatory Studies - Employment and Town Centres

To: Planning Committee

Date: 28th October 2015

For Decision

Linkage to Corporate Plan	
Strategic Theme	Protecting and Enhancing our Environments and Assets
Lead Officer	Sharon Mulhern
Cost: (If applicable)	

1.0 Background

- 1.1 The responsibility for the preparation of a new Local Development Plan for the Causeway Coast & Glens area passed to Council (as the new planning authority) on 1st April 2015.
- 1.2 An indicative 6 month Local Development Plan (LDP) Work Programme was agreed by Elected Members at the Planning Committee held on 27th May 2015.
- 1.3 The work programme includes the presentation of four topic-related preparatory papers to Elected Members, as follows:
 - Population & Growth
 - Environment
 - Employment and Town Centres
 - Housing
- 1.4 The first topic paper (Population & Growth) was presented to Elected Members at the August Planning Committee. The second paper topic paper (Environment) was presented in September. This Employment & Town Centres Paper (attached at Appendix 1) is the third in the series.
- 1.5 Key outputs of the paper are to provide Members with information on:
 - The regional policy context for formulating Local Development Plan (LDP) policies for economic and town centre development;
 - An overview of the provision of employment activity on existing designated employment sites and proposed zonings, and the take up of land on zoned sites as defined in the adopted Northern Area Plan (NAP) 2016.

- An assessment of new jobs over the LDP period and the implications for future economic land zonings requirements; and,
- The range of uses and vacancies within the existing town centres as defined in the adopted NAP 2016, as this is one aspect of a town centre health check required for the production of the LDP.

1.6 This paper takes into account both the recently adopted Northern Area Plan (NAP) 2016 and the Strategic Planning Policy Statement (SPPS).

1.7 The paper considers Employment and Town Centres as separate topics.

2.0 Financial Implications

2.1 None

3.0 Other Implications

3.1 None

4.0 Recommendation

4.1 **IT IS RECOMMENDED** that Elected Members endorse the use of the information contained within this paper in the preparation of the Local Development Plan.

Appendix 1

Discussion Paper 3: Employment & Town Centres

DISCUSSION PAPER 3: EMPLOYMENT AND TOWN CENTRES

CONTENTS		Page
1.0	Introduction	5
Part 1: EMPLOYMENT		
2.0	Regional Planning Context	
	a. Regional Development Strategy (RDS) 2035	5
	b. Planning Policy Statements (PPSs)	6
	c. Planning Strategy for Rural Northern Ireland	7
	d. Strategic Planning Policy Statement	8
	e. Northern Ireland Executive Economic Strategy: Priorities for Sustainable Growth and Prosperity	8
	f. Lifetime Opportunities – Anti-Poverty and Social Inclusion Strategy	9
	g. Enabling Success – Supporting the Transition from Economic Activity to Employment: A Strategy to Tackle Economic inactivity	9
3.0	Council’s Economic Development Strategy	10
4.0	Northern Area Plan 2016	10
5.0	Approaches to Determine Future Economic Development Land Supply Needs	11
	a. Take-up of Existing Sites	11
	b. Population and Economic Activity	12
	c. Enabling Success Strategy	12
	d. New Economic Development Land Allocations	12
6.0	Distribution of Economic Development Zonings	13
7.0	Rural Employment Sites including Quarries	13
8.0	Conclusions	14
Part 2: TOWN CENTRES		
9.0	Regional Planning Context	14
	a. Regional Development Strategy (RDS) 2035	14
	b. Strategic Planning Policy Statement	15
10.0	Northern Area Plan 2016	16
11.0	DSD Masterplans	17
12.0	Town Centres and Future Retail Need	17
13.0	Conclusions	18

APPENDICES	Page
Appendix 1: RDS 2035, The Employment Land Evaluation Framework	
Table 3.1 (page 32)	19
Appendix 2: Economic Development Zonings as Contained in the	
Northern Area Plan 2016	20
Appendix 3	
Table 1: Take up of Industrial Zonings Contained in the Adopted North East Area Plan and Limavady Area Plan at 2009	21
Table 2: Average Annual Industrial Land Take-up by Previous Adopted Plan Area	21
Table 3: Potential Remaining Land Supply on the NAP Zonings at 2009 Based on the Average Annual Take Up from Table 2	21
Table 4: Update of the Potential Remaining Land Supply on the NAP Zonings at 2015 Based on the Average Annual Take Up from Table 2	22
Table 5: Population and Economic Activity in Plan Area	22
Table 6: Jobs Required Using the Enabling Success Interim Target	23
 Appendix 4: Location of Rural Employment Sites including Quarries (Associated Maps at end of paper)	 24
 Appendix 5: RDS 2035, The Hierarchy of Settlements and Related Infrastructure Wheel (page 24)	 29
 Appendix 6: Definitions of Convenience and Comparison Shopping (National Retail Planning Forum, Retail Definitions Working Group, October 2008)	 30
Table 7: Summary of the Range of Uses in each Town Centre as a Percentage at 2015	30
Table 8: Comparison of Town Centre Vacancy Levels at 2008, 2009, 2012, 2015 and 2014 (GL Hearn)	31
Table 9: Comparison of Potential Future Retail Capacity for the Hubs (Net Sq Metres) Taken from Various Reports	31

MAPS

Please refer to the Adopted Northern Area Plan maps, available from the Planning office or online at: www.planningni.gov.uk/index/policy/dev_plans/devplans_az/northern_2016.htm

Settlements with Existing and Zoned Economic Development Sites and Town Centres are listed overpage.

Employment

Existing Economic Development Sites and Zonings by Legacy Councils

Ballymoney	Coleraine	Limavady	Moyle
Ballymoney	Coleraine	Limavady (including Aghanloo)	Ballycastle
Balnamore	Garvagh	Ballykelly	Bushmills
Cloghmills	Kilrea	Dungiven	Cushendall
Rasharkin	Castleroe	Greysteel	

Town Centres by Legacy Councils

Ballymoney	Coleraine	Limavady	Moyle
Ballymoney	Coleraine	Limavady	Ballycastle
	Portrush	Dungiven	Bushmills
	Portstewart		Cushendall
	Garvagh		
	Kilrea		

Map Series 1: Location of Rural Employment Sites in the Council Area

- a. Ballymoney Area
- b. Coleraine Area
- c. Limavady Area
- d. Moyle Area

Map 2: Location of Quarries in the Council Area

1.0 Introduction

1.1 The purpose of this Employment and Town Centres paper is to provide Members with information on:

- The regional policy context for formulating Local Development Plan (LDP) policies for economic and town centre development;
- An overview of the provision of employment activity on existing employment sites and zonings, and the take up of land on zoned sites as defined in the adopted plans,
- An assessment of new jobs over the LDP period and the implications for future economic land zoning requirements;
- The range of uses and vacancies within the existing town centres as defined in the adopted plan, as this is one aspect of a town centre health check required for the production of the LDP.

1.2 This paper will consider Employment and Town Centres in separate parts.

PART 1: EMPLOYMENT

2.0 Regional Planning Context

2.1 The regional planning context is provided by the Regional Development Strategy (RDS) 2035 and Planning Policy Statements (PPSs).

a. Regional Development Strategy (RDS) 2035

2.2 The RDS 2035, published by the Department of Regional Development (DRD), promotes a balanced spread of economic development opportunities, focussing on urban hubs located on key and link transport corridors (ie Coleraine, Limavady, Ballycastle and Ballymoney), as the main centres for employment and services.

2.3 Hubs are promoted as the place for economic development opportunities to be concentrated (page 72, Policy SFG 11). They are performing economic roles and have the potential for further economic expansion, and small businesses and service sector offices could locate in these towns. Hubs and clusters of hubs are to be considered first for new development. In the local context, the Council's four Hubs have been identified in the RDS as having the potential to cluster, as it is reasonably well connected due to the length of journey times between centres (page 66).

2.4 The RDS recognises that employment provision should be co-ordinated with the provision of services, facilities and infrastructure. The RDS provides an Employment Land Evaluation Framework (page 32, Table 3.1) and this is reproduced in Appendix 1 for assistance. This table may be used to enable Planning Authorities to identify robust and defensible portfolios of both strategic and locally important employment sites in their development plans. This will safeguard both new and existing employment areas for employment purposes rather than other uses. The RDS also states that existing land zoned for economic use in development plans should be protected to ensure a variety of suitable sites exist across Northern Ireland to facilitate economic growth. Economic development opportunities should be promoted across the Region focussed on the Belfast Metropolitan Urban Area, Londonderry and the Hubs as the main centres for employment and services, and provide a network of economic development opportunities by making provision in the LDP for an adequate and continuous supply of land for employment purposes. The RDS indicates there is a more than adequate

supply of employment land up to 2028, with an estimated need for 450 hectares of employment land compared to a supply of more than 2000 hectares (page 17).

- 2.5 The RDS also recognises that, to sustain rural communities, new development and employment opportunities which respect local, social and environmental circumstances are required. Rural industries, businesses and enterprises in appropriate locations, integrated appropriately within the settlement or rural landscape, should be facilitated. The expansion of rural tourism and associated development that is both sustainable and environmentally sensitive should be encouraged (page 74, paragraph 3.96).

b. Planning Policy Statements (PPSs)

- 2.6 These are produced by the Department of Environment (DoE) and provide planning guidance at the regional level. PPS 4: Planning and Economic Development is the most directly relevant PPS, although PPS 21: Sustainable Development in the Countryside provides guidance relating to development such as farm diversification and the conversion and reuse of buildings in the countryside, and the provision of necessary community facilities to serve the local rural population. PPS 4 provides the policy guidance in relation to both existing employment sites with the general premise to protect these from alternative non-employment related development, and in relation to the development of new zoned land.

Use Classes Order 2015

- 2.7 Part B of the Use Classes Order (UCO) relates to industrial and business uses and subdivides these into 4 Classes:

- B1: Business
- B2: Light Industrial
- B3: General Industrial
- B4: Storage and Distribution

- 2.8 PPS 4 requires development plans to ensure an ample supply of suitable land is available to meet economic development needs within the plan area, and identify and protect a portfolio of the most appropriate job creation opportunities. It asks that, in preparing a plan, a number of factors should be taken into account (paragraph 4.19, page 11); including estimates of future need; take up of land; stakeholder views; potential for regeneration; accessibility; and potential environmental impacts. It advises that Plans should (page 3, paragraph 4.21):

- provide ample land zoned for economic development offering choice of site and location;
- safeguard existing economic development land where appropriate;
- designate areas for mixed use development;
- identify areas suitable for Business Use; and,
- reallocate sites not considered realistic for economic uses for other uses.

- 2.9 PPS 4 provides policy for determining applications within settlements and in the rural area. It facilitates, subject to criteria, the development of small community enterprise parks/centres or small rural industrial enterprises outside of villages and smaller rural settlements (Policy PED 6). It also provides for the protection of zoned and unzoned land (PED 7) from alternative uses.

c. Planning Strategy for Rural Northern Ireland

2.10 This document predates the introduction of PPSs and has largely been replaced by them, including the majority of policies relating to Industry and Commerce. The Rural Strategy covers all of the towns, villages and countryside of Northern Ireland outside Belfast and Londonderry. Two policies specific to office developments, policies IC16: Office Development, and IC17: Small Office and Business Development, are retained in the Strategy. These policies seek to facilitate office development in existing town centres, and small scale offices in other locations including commercial areas, neighbourhood centres, villages and smaller rural settlements. Policy PSU 1: Community Needs, provides for land to be allocated to meet the needs of communities in terms of health, education and other public facilities.

d. Strategic Planning Policy Statement (SPPS)

2.11 The Strategic Planning Policy Statement (SPPS) was published on 28th September 2015 and its provisions must be taken into account in the preparation of LDPs. A transitional period will operate where existing regional planning policy, as contained in the majority of the PPSs and the Rural Strategy, will apply, until a Plan Strategy for the Council area has been adopted. Therefore, other than PPS 1: General Principles, PPS 5: Retailing and Town Centres, and PPS 9: The Enforcement of Planning Control (which are cancelled with the introduction of the SPPS), the remaining PPSs and relevant provisions of the Rural Strategy are retained. Any conflict between the SPPS and any policy retained under the transitional arrangements must be resolved in the favour of the SPPS.

2.12 The SPPS refers to the growth of a sustainable economy and investment in the future as a key strategic priority of the Northern Ireland Executive. It advises that effective planning for the economy requires the planning system to take into account the overarching strategic framework provided by the RDS as well as meeting local needs, and that the Spatial Framework of the RDS aims to exploit the economic potential of the strategic network of urban hubs, key transport corridors and regional gateways, and to provide for a diversified and competitive rural economy. The Regional Strategic Objectives set out in paragraph 6.82 (page 56) in the SPPS are:

- promote sustainable economic development in an environmentally sensitive manner;
- tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality;
- sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
- support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
- promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and
- ensure a high standard of quality and design for new economic development.

2.13 The SPPS states that, in larger settlements such as towns, planning decisions must, to a large extent, be informed by the provisions made for economic development through the LDP process. A fundamental role for LDPs is to ensure that there is an ample supply of suitable land available to meet economic development needs in the area, and LDPs

should zone sufficient land for this use over the plan period. A range and choice of sites, including mixed use development, should be zoned to promote flexibility and provide for varying economic activity needs. Factors such as public accessibility, adequate infrastructure, specialised needs of specific activities, potential environmental impacts and compatibility with neighbouring land uses should all be taken into account in identifying land to be zoned. Monitoring of take-up and loss to other uses should also be established to help identify any future shortfalls or highlight the need to reconsider the proposed use of sites (paragraph 6.92). Where appropriate, LDPs should also identify previously developed land in settlements for economic development to bring such land into productive use and promote regeneration, physical renewal and sustainable development (paragraph 6.93).

- 2.14 Under the Regional Strategic Policy section (page 57), the SPSS does not contemplate land to be zoned for economic development in villages and small settlements, as this could inhibit flexibility, although favourable consideration should be given to an economic development proposal where it is of a scale, nature and design appropriate to the character of the settlement (paragraph 6.86). The guiding principle for policies and proposals for economic development in the countryside is to facilitate proposals likely to benefit the rural economy and support rural communities, while protecting or enhancing rural character and the environment (paragraph 6.87). Paragraph 6.88 states there is a need, in the interests of rural amenity and wider sustainability objectives, to restrict the level of new building for economic development purposes outside settlements. Exceptions may only be justified in two instances, where there is no suitable site within or on the edge of the settlement, or where if a proposal is for major industrial development and a countryside location is necessary due to size or site specific requirements (paragraph 6.88, page 57).

e. Northern Ireland Executive Economic Strategy: Priorities for Sustainable Growth and Prosperity

- 2.15 This Strategy was published in March 2012, and presents the following economic vision for 2030:

An economy characterised by a sustainable and growing private sector, where a greater number of firms compete in global markets and there is growing employment and prosperity for all.

- 2.16 The Strategy's key economic priorities are to rebalance the economy by growing the private sector by stimulating innovation, research and development and creativity, improving skills and employability, compete effectively in the global economy, encourage business growth and develop modern and sustainable economic infrastructure.

- 2.17 The strategy also aims to rebuild the economy to address the impact of the global economic downturn. This includes action to:

- Promote accessible employment opportunities particularly in areas of economic disadvantage, and
- Provide training and re-skilling to those who are unemployed or inactive due to the downturn.

- 2.18 The Strategy identifies the greatest potential for growth within the science/industry area and the following markets to exploit further;

- Telecommunications and ICT,
 - Life and Health Sciences,
 - Agrifood,
 - Advanced Materials, and
 - Advanced Engineering.
- 2.19 Other sectors that are key to the delivery of opportunities include the services sector, including business and financial services. Sectors that will continue to make important contributions to the economy include:
- Creative industries,
 - Tourism,
 - Social economy, and
 - Rural economy.
- 2.20 The Strategy highlights the need to ensure that spatial LDPs are developed and implement the plan-led development management system.
- f. Lifetime Opportunities - Anti-Poverty and Social Inclusion Strategy**
- 2.21 This was published by the Office of the First and Deputy First Ministers in November 2006. In November 2008, the Executive agreed to adopt the broad ‘architecture’ and principles of ‘Lifetime Opportunities’ as the basis of its strategy to tackle poverty and social inclusion and patterns of deprivation in Northern Ireland. The Strategy looks at the issues of poverty and social exclusion at each stage in the life cycle and is structured around a number of challenges that become the priority for future policy and action. These include;
- Eliminating poverty,
 - Eliminating social exclusion,
 - Tackling area based deprivation,
 - Eliminating poverty from rural areas,
 - Shared future – shared challenges,
 - Tackling inequality in the labour market,
 - Tackling health inequalities, and
 - Tackling cycles of deprivation.
- 2.22 The Strategy does not refer specifically to the potential role of planning and development plans in assisting in the achievement of some of these priorities. However, some of the roles of the development plan are to facilitate future development by the provision of adequate and appropriate land zonings to meet future development needs, to accommodate growth appropriate to a settlement’s role and function, and to recognise and support rural communities and their needs, all within the regional planning framework. Therefore, the LDP can assist in meeting some of these challenges, for example tackling area based deprivation via its land use distribution and by providing certainty to the development industry and investment.
- g. Enabling Success – Supporting the Transition from Economic Activity to Employment: A Strategy to Tackle Economic Inactivity in Northern Ireland**
- 2.23 This joint Strategy was published in April 2015 by the Departments of Enterprise, Trade and Investment (DETI) and Employment and Learning (DEL). It acknowledges that Northern Ireland has experienced a consistently high rate of economic inactivity compared to other regions in the United Kingdom, at 27% of the working age population,

compared to the UK average of 22.2%. The Strategy identifies an interim target of achieving an employment rate of more than 70% by 2020. This is to help achieve its Strategic Goal of having a stable and competitive employment rate which exceeds the UK average by reducing the proportion of the working age population (16-64 years) that are classified as economically inactive by 2030.

3.0 Council's Economic Development Strategy

3.1 The Council adopted its Economic Development Strategy 2015-2018 in April this year. As Members are aware, the priorities for the Strategy are to:

- Assist local businesses to grow and become more competitive and innovative,
- Strategically position Causeway Coast and Glens as a place to do business,
- Expand and develop the tourism sector in the area,
- Develop business opportunities arising from the Renewable Energy sector,
- Digital Causeway, the Knowledge Industry and Agrifood sector, and
- Ensure that local infrastructure meets business needs.

3.2 The role of the development plan is to articulate the land use requirements arising from the Economic Development Strategy by zoning sufficient and appropriately located land for new economic development and associated purposes.

4.0 Northern Area Plan 2016

4.1 The Council area is covered by the recently adopted Northern Area Plan 2016. This plan carried forward the industry zonings contained in the main two Adopted plans – North East Area Plan and Limavady Area Plan – and modified these to become Existing Economic Development Sites and Zonings, in line with the terminology used in PPS 4 published in 2010. The Adopted Plan also contained zonings in a number of settlements across the Plan area. A list of the Zoned Economic Development Sites is contained in Appendix 2. The Plan also shows existing economic development sites for information only on the relevant settlement maps, but these are not referenced individually in the Plan. The relevant planning policy for development on existing sites is set out in PPS 4. The related settlement maps for existing and zoned economic development sites are set out in the Contents section under Employment Maps.

4.2 The Adopted Plan allocated 135.7 hectares of land across the four Council areas in Allocation IND 1. Most land is allocated in the towns of Coleraine and Limavady (mainly at Aghanloo Industrial Estate) in recognition of their roles as Main Hubs; the larger population of their associated hinterland; and their good communication links, particularly in terms of the A26 transport corridor. Land is also allocated to the Local Hubs of Ballymoney and Ballycastle. In Moyle District, further land was zoned in Cushedall and Bushmills, in recognition of the geographic form of the District and in response to connectivity and environmental matters relating to Ballycastle.

4.3 The zonings in Coleraine town are distributed throughout it, and provide for a range of economic (Class B) uses, including:

- the expansion of existing, established sites often accommodating more traditional 'industrial estate' type uses;

- opportunities for employment associated with the types of uses attracted to Invest NI sites; and
 - employment activity utilising links to the University of Ulster campus.
- 4.4 Similarly, zoned lands in Limavady and, to a lesser degree in Ballymoney, provide for a range of economic (Class B) uses. The principal zoning in Moyle District is at Bushmills, recognising the Bushmills Distillery's role as a key employer and to facilitate its expansion.
- 4.5 Other than in Bushmills and Cushendall for the reasons outlined above, no need was identified to reserve new land for economic development in the smaller order settlements below the hubs. Accordingly, proposals for new economic development sites in these settlements would be considered in the context of prevailing regional planning policy, in particular PPS 4 and 21.

5.0 Approaches to Determine Future Economic Development Land Supply Needs

- 5.1 There are a number of separate methods that may be applied to forecast future land supply needs and proposed zonings in the LDP, and a more informed decision may be derived by considering these approaches in the round.
- a. Take-up of Existing Sites**
- 5.2 This involves an examination of the average annual take-up of land over a period of time. Evidence on take-up was examined in the preparation of the DNAP and updated for its Independent Examination (IE) and all sites were resurveyed earlier this year in preparation of this report.
- 5.3 When the Draft Plan was prepared, only 30% of the land zoned in the North East Area Plan (NEAP, 1990) and Limavady Area Plan (LAP, 1988) had been developed at 2004 (Technical Supplement, page 30, Section 11.0). A subsequent survey in 2009 revealed that take up had only marginally increased in the intervening five years (Appendix 3, Table 1). This suggests that annual take up rates have been historically low (Appendix 3, Table 2) and, when applied to the undeveloped zonings proposed in the Draft Plan, it indicated there was sufficient land across the Plan area to last beyond the notional end date of the plan (2016) (Appendix 3, Table 3).
- 5.4 The PAC, in its report on the IE to the Draft Plan, agreed that the amount of land allocated for industry reflected the role of the Main Hubs of Coleraine and Limavady as growth poles, and there was sufficient economic development land zoned across the Plan area in general. When considered in the round, the PAC was satisfied that the Draft Plan provided more than sufficient land to cater for the anticipated employment needs over the plan period.
- 5.5 A survey of the NAP zonings undertaken in June this year revealed there has been very little change in the land take-up rates since the situation presented at 2009 (Appendix 3, Table 3), and the updated position is presented in Table 4 of Appendix 3. This indicates there are 121 hectares of zoned land that is undeveloped. As a consequence of the low take-up of economic development land, the number of years until the zonings are exhausted has altered little. Table 4 indicates between zero years' land supply in Cushendall and around 70 years of land supply remaining in Coleraine. The remaining amount of undeveloped zoned land in Ballycastle and Bushmills is very low, whilst the three Hubs of Ballymoney, Limavady and Coleraine have significant amounts of land remaining undeveloped on the zonings. However, a reliance on this aspect of economic

development only to determine future land supply may not take into consideration the fact that all future employment growth opportunities may not require this type of land provision or location. A further understanding of the locational needs of the sectors identified in the Council's Economic Development Strategy (Section 3 above) will help inform consideration of this approach.

b. Population and Economic Activity

- 5.6 This approach considers the potential future number of jobs that will be required, based on population projections, economic activity and unemployment rates.
- 5.7 Table 5 in Appendix 3 projects the population and economic activity forward to 2030, the notional end date of the new LDP. It indicates that, by 2030, in the order of 8,600 new jobs will be required in the Council area.

c. Enabling Success Strategy

- 5.8 As mentioned in Section 2 above, the Strategic interim goal is to achieve an employment rate of over 70% by 2020 in the 16-64 age group. The 2011 Census indicates that 64.19% of the Council's population fell into this age range, which equates to 90,429 people. Table 6, Appendix 3 illustrates that around 6,000 new jobs will be required by 2030 to meet the minimum requirement of 70% employment rate promoted in the Strategy. This is less than the figure identified in the Population and Economic Activity Section immediately above, and the difference may be attributed to the wider age range of 16-74 years in Table 5. It would seem reasonable to assume that the existing economic activity rate within the defined 16-64 age range is higher than the 63.56% applied to the wider age range. This would have the knock-on effect of reducing the required additional jobs total, although this may be balanced, to some degree, by the increasing retirement age.
- 5.9 Taking these two population and employment led approaches, they indicate a range of 6,000 to 8,600 new jobs will be required between 2011 and 2030. As Members may recall from the Population and Growth paper presented in August, population projections for Northern Ireland indicate a much greater growth in the population aged 65 years and over compared to those under 65 years. Also, the population increase for the Council area compared to Northern Ireland is much lower. These projections may assist in determining the most appropriate level of new provision to be contemplated.

d. New Economic Development Land Allocations

- 5.10 The information relating to the potential number of new jobs required over the LDP period may be applied to assist in identifying the likely requisite land requirements. Research previously undertaken by the DoE (Omagh office) in relation to jobs' density in industrial estates indicated a density of 50 jobs per hectare of operational land. On this basis, 6000 new jobs to 2030 would require land zonings of 120 hectares over the Council area, with 8600 new jobs requiring 172 hectares. However, as Members will be aware, not all new jobs will be provided on economic development sites, but in other locations also such as town centres and rural areas, home working and through the intensification of existing businesses and services. Further, not all jobs will be full time, and arrangements such as flexible working, job share and part time working may influence the overall requirement.
- 5.11 Table 4, Appendix 3, indicates that 121 hectares of zoned land in NAP for economic development is presently available, therefore, an additional 0-51 hectares should be zoned in theory. Further examination of the annual take-up rate can help guide consideration. Tables 2, 3 and 4 of Appendix 3 indicate, historically, land take-up has been slow and there is an ample supply of land in the majority of the Council area to meet its long term needs. However, it is recognised that take up may be of limited use,

given calculations can be significantly affected by the development of just one large site, and PPS4 requires future needs to be assessed in preparing a development plan.

- 5.12 Existing developed sites but with vacant premises have not been factored into this exercise. Consideration should be given to the inclusion of the reuse of these sites and premises in determining the need for new land zonings also.
- 5.13 If the provision of 8600 new jobs is considered as a target for the LDP, with the associated allocation of 172 hectares of land (requiring an additional 51 hectares of new zoned land), this has the inbuilt advantage of providing a degree of flexibility as it assumes all new jobs will be provided on these zonings, which clearly would not be the case. Further, different operational and working practices may also influence the land requirements downwards. This target may also be affected by the need to balance future economic development zonings with potential environmental impact, for example in designated areas such as the AONBs.

6.0 Distribution of Economic Development Zonings

- 6.1 The Planning Act 2011 requires a LDP Plan Strategy to take account of the RDS and any policy or advice contained in guidance issued by the Department, amongst other things. Therefore, the preparation of the Plan's Strategy in relation to economic development and the distribution of zonings should take account of the RDS and its approach that Main Hubs and Clusters should be the focus for growth.
- 6.2 As mentioned earlier, Coleraine and Limavady are Main Hubs, with Ballymoney and Ballycastle Local Hubs. Of these four towns, Limavady, Coleraine and Ballymoney benefit from good accessibility to the key transport corridor of the A26, and Coleraine and Ballymoney lie on the Londonderry to Belfast railway line. The environmental quality of Ballycastle, together with its relative inaccessibility to the main transport corridor, has been recognised in the past, and Bushmills, in recognition of its Distillery, has been promoted as the main focus for economic growth in that area. Further work is required with the Economic Development Unit to determine if the job forecasts set out in Section 5 above are reasonable and the locational needs of new zonings to assist in delivering the Economic Development Strategy.

7.0 Rural Employment Sites including Quarries

- 7.1 Planning policies, such as PPS 4: Planning and Economic Development, PPS 21: Sustainable Development in the Countryside, and the Minerals Policies contained in the Rural Strategy, recognise the role sites in the countryside can play in providing employment opportunities to rural communities. However, the DoE did not survey such sites historically as the role of Development Plans was to aim to ensure there was an ample supply of identified suitable land for economic development within the context of the regional guidance set out in the RDS to focus growth in the Hubs and the key transport corridors.
- 7.2 The process of identifying rural employment sites is ongoing, as is the identification of quarries. As the exercise is to concentrate on existing employment sites that provide for local job opportunities over and above a single trader, a threshold of 0.2 hectares has been applied, and the identified sites are limited to those that fall into the Class B range of activities under the Use Classes Order as set out in Section 2 above. The listed sites have been identified initially from local knowledge, and also from a desk based exercise

and may be subject to review. It is acknowledged that there is a range of self-employed people in rural areas, for example car mechanics, and child minders, who provide a valuable local service but are not recorded as part of this exercise. A map and associated list of the rural employment sites (arranged by the legacy councils) within the Council area is included at the end of this paper, however, Members may be aware of others not identified. A map and associated list of quarries in the Council area is also contained at the end of the paper but, again, Members may be aware of others.

8.0 Conclusions

- 8.1 The work previously undertaken in terms of employment provision provides a useful understanding of the situation regarding such provision across the settlements within the Council's area. It indicates that, in principle, the present allocation and distribution of economic development land identified in development plans accords with regional planning policy. The role of employment sites and quarries outside of settlements, which has not been previously explored in depth, is recognised as an important contributor to the local economy and the provision of local job opportunities in rural areas, and may influence the extent of future land requirements. An area of further work is to develop an understanding of how the Council's Economic Development Strategy impacts on the Development Plan and future land allocations for economic development purposes.

PART 2: TOWN CENTRES

9.0 Regional Planning Context

- 9.1 The regional planning context is provided by the Regional Development Strategy (RDS) 2035 and Planning Policy Statements (PPSs).

a. Regional Development Strategy (RDS) 2035

- 9.2 The RDS recognises that some places do not offer the quality of facilities required to meet the needs of local people and that regeneration and urban renaissance is necessary to create more accessible, vibrant town centres that offer people more local choice for shopping, social activity and recreation (page 38, Policy RG 7). Urban renaissance is defined as the process of development and redevelopment in urban areas to attract investment and activity, foster revitalisation and improve the mix of uses (page 39). Policy SFG 11 also promotes economic development at Hubs, advising that these, and the higher performing town in the cluster should be considered first in the decision process (page 72).
- 9.3 The RDS contains a Hierarchy of Settlements and Related Infrastructure Wheel (Diagram 2.2, page 24) and this is reproduced in Appendix 4. This diagram sets out the ranges of facilities and services that should reasonably be available in each level of the settlement hierarchy. It should assist in determining the Council's proposed settlement hierarchy and the distribution of land zonings and proposed development generally in the LDP. In terms of town centres, the diagram illustrates that, at the regional towns/clusters (Level 3) level, shopping centres, retail warehousing and a range of restaurants would be expected. At the lower level 2 – Urban Centres, Smaller Towns – a supermarket, restaurants and a mix of retail facilities would be expected, whilst at level

1 – Villages – a shop, pub, post office and petrol station are identified as the level of services and facilities that would be expected.

b. Strategic Planning Policy Statement

9.4 The SPPS contains new strategic policy on town centres and retailing within the framework of the RDS 2035. The Regional Strategic Objectives for town centres and retailing are to:

- secure a town centres first approach for the location of future retailing and other main town centre uses including cultural and community facilities, leisure, entertainment and businesses;
- adopt a sequential approach to the identification of retail and main town centre uses in LDPs;
- ensure LDPs are informed by robust and up to date evidence in relation to need and capacity;
- protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community uses, housing and business;
- promote high quality design to ensure town centres provide sustainable, attractive and accessible and safe environments; and
- maintain and improve accessibility to and within the town centre (paragraph 6.271, page 101).

9.5 In preparing its LDP, the SPPS states councils should work collaboratively with other relevant stakeholders to inform plan preparation given the wide range and complexity of issues that influence the development, role, function and success of town centres.. An assessment of the need or capacity for retail and other main town centre uses across the Plan area should be undertaken, and a key element in developing the evidence base will be the preparation of town centre health checks, to be reviewed regularly, preferably at least once every five years. Health checks should incorporate the following indicators:

- existing town centre uses, including resident population;
- vacancy rates;
- physical structure and environmental quality including opportunities, designations constraints;
- footfall;
- retail representation;
- attitudes and perceptions;
- prime rental values; and
- commercial yields.

9.6 LDPs should include a strategy for town centres and retailing and contain appropriate policies and proposals that must promote town centres first for retail and other main town centres uses. As part of the process of identifying sites to be allocated for town centre uses, Councils should undertake a ‘call for sites’ consultation exercise. Plans should also:

- define a network and hierarchy of centres – town, district and local, acknowledging the role and function of rural centres;
- define the spatial extent of town centres and the primary retail core;
- set out appropriate policies that make clear which uses will be permitted in the hierarchy of centres and other locations, and the factors that will be taken into account for decision making;
- provide for a diverse offer and mix of uses, which reflect local circumstances; and
- allocate a range of suitable sites to meet the scale and form of retail, and other town centre uses.

9.7 In judging between allocations on non-primary area sites, preference will be given to edge of town centre land before considering out-of-centre sites. Edge-of-centre sites have a default distance threshold of 300 metres from the town centre boundary, although other thresholds may be set by the Council subject to local issues. This highlights the need for a re-assessment of the current town centre boundaries as defined in the NAP.

9.8 Policies and proposals for shops in villages and small settlements should be consistent with the aim, objectives and policy approach for town centres and retailing, meet local day to day needs and be of a scale, nature and design appropriate to the settlement.

9.9 As part of the preparation of the draft SPPS, the DoE commissioned GL Hearn to undertake a report of town centres and retailing in Northern Ireland. This report included a health check of all existing town centres in Northern Ireland in April 2013, including the Council's four main towns. This report may provide a useful starting point in the preparation of future work, and comparison with the existing monitor work relating to the range of uses and vacancies within town centres, although further examination of the GL Hearn methodology is required to establish this.

Use Classes Order

9.10 Part A: Shopping and Financial & Professional Services, of the Order divides these activities into the following Classes;

- A1: Shops
- A2: Financial, professional and other services.

9.11 In relation to town centres uses, other relevant parts of the Order include Part C: Residential Uses, and Part D: Community, Recreation and Culture.

10.0 Northern Area Plan 2016

10.1 The Northern Area Plan (NAP) incorporated the six town centres designated in the previous area plans:

- North East Area Plan (NEAP): Ballymoney, Ballycastle, Coleraine, Portrush and Portstewart;
- Limavady Area Plan (LAP): Limavady.

- 10.2 It also designated centres for the smaller towns of: Bushmills, Cushendall, Dungiven, Garvagh and Kilrea. Local centres were designated in Ballymoney, Coleraine, Limavady, Portrush and Portstewart.
- 10.3 The PAC considered the issue of the definition of Riverside in Coleraine at the Independent Examination, and agreed with the DoE that it did not have non-retail units, such as banks and building societies, that are found in district centres. The PAC considered Riverside's designation as a District Centre would promote its growth in Coleraine in general and could ultimately be detrimental to the vitality and viability of Coleraine town centre. The PAC concluded it should not be designated as a District Centre, and recommended that its status should remain as per the Draft Plan, that is as white land with the development limit.
- 10.4 Surveys of the defined town (and local) centres have been undertaken over a number of years, most recently in June this year, to examine the range of uses at ground floor level in terms of the UCO, the nature of retail provision (convenience and comparison – for definitions see Appendix 6) and the vacancy level, which are components of a health check. .
- 10.5 The surveys have demonstrated changes in the retail offer in town centres, and the changing levels of vacancies in all units in each centre. Table 7, Appendix 6 presents the situation in relation to vacancies, as a percentage of the total number of units in town centres, at intervals since 2008. The percentage figures presented by GL Hearn (as a published source) in its January 2014 report, which accompanied the Draft SPPS, are also presented in Table 7 in Appendix 6. However, some caution should be exercised in comparing the GL Hearn figures with the others, as the survey methods may not directly correlate. Also, the percentage vacancy figures in some centres, such as Ballymoney, may be affected by a concentration of long standing empty premises.

11.0 DSD Masterplans

- 11.1 Masterplans prepared by DSD in association with the legacy councils cover Coleraine (2012), Limavady (2011), Ballycastle (2009) and Ballymoney (2014). In addition, a Portrush Regeneration Strategy Western Peninsula was published in 2007 and a Lansdowne masterplan in 2014. Coleraine Borough Council prepared a masterplan for Portstewart in 2009. Again, these documents provide useful reference material in the preparation of the LDP, particularly where proposals have been implemented and potential impact on the town centres and their vitality and viability can be reviewed.

12.0 Town Centres and Future Retail Need

- 12.1 The approach advocated in planning to help determine the vitality and viability of town centres is to undertake a health check, examining the details set out in paragraph 9.6 above. Historically, and in common with many local authorities, the DoE commissioned consultants to prepare health checks to inform the production of development plans. The incorporation of the planning function into the Council allows the opportunity to review this practice and collaborative work with other sections of the Council, for example Places and Prosperity, will establish if the majority of the health checks may be undertaken within the Council with input from consultants limited to particular aspects.

12.2 The DoE, in its preparation of the DNAP, commissioned a health check from Drivers Jonas in 2003, and a shoppers' survey from MORI in the same year. A further study was undertaken by the DoE in 2005 to inform the preparation of the review to PPS 5. Both of these reports predicted convenience and comparison shopping quantitative need to 2016. More recently, the Department of Social Development commissioned DTZ in June 2011 to carry out retail capacity studies to 2020 to inform the preparation of the town centre masterplans. The DTZ report predicted a small growth potential in both convenience and comparison retailing to the local hubs of Ballycastle and Ballymoney, with no additional capacity for Coleraine and a limited growth in convenience retailing in Limavady, in recognition of the extent of retail development and planning permissions in the towns at that time. Table 8 in Appendix 6 provides more details on the identified needs from each survey for each of the four main towns.

13.0 Conclusions

13.1 The role of town centres in meeting the needs of communities and providing a diverse range of services and facilities is emphasised in the SPPS with its 'town centre first' approach. Up to date information in relation to town centres' health checks is a key element in determining proposals both in town centres, edge of centres and out of town centres in the future. Survey work is already undertaken in relation to some components of health checks in some town centres, but further work is necessary to provide the comprehensive approach required to prepare a sound basis for any future policy direction in the LPD. This should also determine which aspects may be prepared within the Council and which require external expertise, including collaboration with town centre stakeholders.

13.2 The town centres display a strong presence of independent retailers and service providers which helps provide an attractive alternative to national operators and contributes to the local distinctiveness of each centre. Due to changes in shopping habits and the growth of internet shopping, it is unlikely that the town centres will remain the primary focus for all future retailing activity. As the SPPS promotes, town centres should be the location for a wide range of services and facilities, including retail, leisure, entertainment, business, housing and cultural and community uses, to provide a greater diversity within them and maintain activity throughout the day and into the night. This highlights the need for a comprehensive approach to the future of town centres, the distribution of population growth and housing, and the maintenance of existing and the location of new facilities in general.

Appendix 1: RDS 2035, The Employment Land Evaluation Framework Table 3.1 (page 32)

TABLE 3.1: The Employment Land Evaluation Framework	
<p>Stage 1 Taking Stock of the Existing Situation</p>	<p>An initial assessment of the ‘fitness for purpose’ including the environmental implications of the existing employment land portfolio. This is principally in order to identify the ‘best’ employment sites to be retained and protected and identifying sites that should clearly be released for other uses.</p>
<p>Stage 2 Understanding Future Requirements</p>	<p>Quantify the amount of employment land required across the main business sectors during the development plan period. This is achieved by assessing both demand and supply elements and assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites. Account should also be taken of turnover of existing sites due to relocation or closures. Both short/medium term and strategic provision need to be considered in this process.</p>
<p>Stage 3 Identifying a ‘New’ portfolio of sites</p>	<p>Devise qualitative site appraisal criteria to determine which sites meet the occupier or developer needs. Confirm the existing sites to be retained, replaced or released, and any gaps in the portfolio. In this allocation, consideration should be given to previously used sites, and in the reallocation, the environmental impact of one site relative to others should be included. The results of Stage 2, together with this site-appraisal should provide a robust justification for altering allocations for employment land.</p>

Appendix 2: Economic Development Zonings in the Northern Area Plan 2016

Ballymoney

Plan Ref	Address	Area (ha)
BYED 01	Riada Avenue Estate	12.10

Coleraine

Plan Ref	Address	Area (ha)
CEED 01	Bushmills Road	0.4
CEED 02	University Science Cluster	8.37
CEED 03	Loughan Hill	6.34
CEED 04	Off Ballycastle Road	5.59
CEED 05	Newmills Road	7.86
CEED 06	Wattstown	22.64
CEED 07	Riverside Business Park	4.3

Limavady and Aghanloo

Plan Ref	Address	Area (ha)
LYED 01	Aghanloo Industrial Estate	61.23

Ballycastle

Plan Ref	Address	Area (ha)
BEED 01	Leyland Road	1.27
BEED 02	Leyland Road	1.01

Bushmills

Plan Ref	Address	Area (ha)
BSED 01	Old Bushmills Distillery Northern Extension	2.64
BSED 02	Lands South of Old Bushmills Distillery	0.77
BSED 03	Lands West of Old Bushmills Distillery	2.34

Cushendall

Plan Ref	Address	Area (ha)
CSED 01	Gortaclee Road	0.44

Appendix 3

Table 1: Take up of Industrial Zonings Contained in the Adopted North East Area Plan and Limavady Area Plan at 2009

Table 1: Take up of Industrial Zonings Contained in the Adopted North East Area Plan and Limavady Area Plan at 2009 Council Area	Allocation (hectares)	Developed Land at 2009 (hectares)	Land Available for Development (hectares)	Land Available for Development as a Percentage of Allocation
NEAP				
Ballymoney	12.4	3.4	9.0 (¹ 5.9)	48.6%
Coleraine	44.8	8.1	36.6 (² 35.3)	78.8%
Moyle	4.4	0.9	3.5 (³ 2.5)	56.8%
NEAP	61.6	12.5	49.1 (43.7)	61.4%
LAP				
Limavady	91.8	29.6	56.8	61.8%
LAP	91.8	29.6	56.8	61.8%
Council Area Total	153.4	42.1	105.9 (100.5)	

¹ DNAP proposes 3.1 ha be rezoned to BYH15, therefore revised land availability equates to 5.9 ha

² DNAP proposes 1.5 ha be rezoned to CET06, therefore revised land availability equates to 35.3 ha

³ DNAP proposes 1.0 ha be rezoned to BEH30, therefore revised land availability equates to 2.5 ha

Table 2: Average Annual Industrial Land Take-Up by Previous Adopted Plan Area Plan

Table 2: Average Annual Industrial Land Take-Up by Adopted Plan Area Plan	Years (Plan Adoption) to 2009	Total Land Take-Up	Average Annual Land Take-Up
NEAP	1990 – 2009 (20 years)	12.5 ha	0.63 ha
LAP	1984-2009 (26 years)	29.6 ha	1.14 ha

Table 3: Potential Remaining Land Supply on the Proposed DNAP Zonings at 2009 Based on the Average Annual Land Take-Up from Table 2

Council Area	Settlement	Land Zoned in DNAP (ha)	Residue of Zoned Land (ha) at 2009	Average Annual Take-up (table 2)	Number of Years Until Zoning Exhausted
Ballymoney	Ballymoney	12.1	12.1	0.63 ha	19.2
Coleraine	Coleraine	55.2	49.6	0.63 ha	78.7
Limavady	Limavady	61.2	59.8	1.14 ha	52.4
Moyle	Ballycastle	2.3	2.3	0.63 ha	3.6
	Bushmills	5.8	5.0	0.63 ha	7.9
	Cushendall	0.4	0	0.63 ha	0

Table 4: Update of Potential Remaining Land Supply on the NAP Zonings at 2015 Based on the Average Annual Land Take-Up from Table 2

Council Area	Settlement	Land Zoned in DNAP (ha)	Residue of Zoned Land (ha) at 2015	Average Annual Take-up (table 2)	Number of Years Until Zoning Exhausted
Ballymoney	Ballymoney	12.1	12.1	0.63 ha	19.2
Coleraine	Coleraine	55.2	44.3	0.63 ha	70.3
Limavady	Limavady	61.2	59.8	1.14 ha	52.4
Moyle	Ballycastle	2.3	1.7	0.63 ha	2.7
	Bushmills	5.8	3.1	0.63 ha	4.9
	Cushendall	0.4	0	0.63 ha	0
Total		137.0	121.0		

Table 5: Population and Economic Activity in Plan Area

	NI	CC&G	Ballymoney	Coleraine	Limavady	Moyle
1. Population 2011 % of Plan Area	1,810,863	140,877	31,224 (22%)	59,067 (42%)	33,536 (24%)	17,050 (12%)
2. 2011 Population 16-74 & as % of total	1,313,420 (72.53%)	102,820 (72.99%)	22,558 (72.25%)	43,277 (73.27%)	24,610 (73.385%)	12,375 (72.58%)
3. Economic Activity Rate	66.22%	63.65%	65.34%	64.22%	61.23%	63.33%
4. In Employment 2011	795,263 (44%)	58,936 (42%)	13,426 (43%)	25,272 (43%)	13,217 (39%)	7,021 (41%)
5. Population 2030 (estimate)	1,974,611	145,491	32,239	61,005	34,643	17,604
6. Population 16-74 in 2030	1,432,185	106,194	23,293	44,698	25,421	12,777
7. Economically Active 2030	948,393	67,592	15,220	28,705	15,565	8,092
8. Number of New Jobs Required (Rows 7-4)	153,130	8,656	1,794	3,433	2,348	1,071

Source: NISRA 2011 Tables KS601NI, KS604NI

Row 5 -assumes population percentages as per Row 2. The distribution of this increase may be affected by the development plan strategy.

Row 6 –assumes % rate as per Row 3.

Table 6: Jobs Required Using the Enabling Success Interim Target

	At 2011	Situation at 2011	Projected Situation at 2030
1. CC&G Population		140,877	145,491
2. % of Population age range 16-64 years	64.19%	90,429	93,391
3. CC&G Economic Activity Rate	63.65%	57,558	59,443
4. Enabling Success figure of Economic Activity	70%	63,300	65,373
5. Additional Number of Jobs Required to raise rate from 63.65 to 70% (4-3)		5,742	5,931

Figures relating to 2030 use the % figures at 2011

**Appendix 4: Location of Rural Employment Sites within the Council Area.
Associated Maps Series 1a-d at end of paper**

Ballymoney Area

Map Ref	Business	Area (ha)
1	McMullan Transport	1.05
2	Terex, 69 Frosses Road, Ballymoney	4.04
3	Mc Comb Steel Stockists 10-12 Landhead Road Dunaghy	0.69
4	R Barkley & Sons 14 Landhead Road Dunaghy	0.94
5	Mc Auley Kitchen Factory, 150 Bann Road, Ballymoney	5.24
6	KBB Doors Ltd, 6 Portna Road Rasharkin, Ballymoney	5.32
7	McKeown Turkeys, Townhill Road, Rasharkin	2.45
8	S Dooley & Co, 7 Presbytery Lane, Dunloy	0.48
9	D B Contracts, 9 Presbytery Lane, Dunloy	0.52
10	Wilson Engineering, 119 & 121 Gracehill Road	0.77
11	Farran Engineering, Farran Road, Ballymoney	1.18
12	Ballymoney Engineering Co Ltd, 142 Kirk Road, Ballymoney	0.56
13	SJ McAuley, Engineering 35 Vow Road, Ballymoney	0.81
14	JTC Dairy equipment engineering, 62 Burnquarter Rd, Ballymoney	0.34
15	Cregs Enterprises Ltd, 54 Gortahar Road, Rasharkin	0.95
16	M Hasson & Sons Structural Engineering, 340 Townhill Road Rasharkin	4.0
17	J & S Staircases, 71 Bridge Road, Dunloy	0.75
18	50 Kirk Road, Ballymoney	0.32
19	Causeway Pallets & Transport Ltd, Adj 74 Fivey Road, Stranocum	2.5
20	Bespoke Furniture 17 Kilmandil Road, Dunloy	0.99
21	103 Bann Road, Rasharkin	0.86

Coleraine Area

Map Ref	Business	Area (hectares)
1	Castleroe Pre-Cast Concrete, 130 Castleroe Rd	1.06
2	Nicobrand, 189 Castleroe Rd	2.48
3	A Diamond & Son, 35 Newmills Rd	4.23
4	Rooms Dynamic Furniture, 98 Drumcroon Rd	0.80
5	Geotechnical & Environmental Services, 22A Kilmoyale Rd	0.33
6	William McLoughlin & Sons, Letterloan Rd	1.65
7	Kennedy Products (Concrete), Letterloan Rd	3.53
8	Kennedy Contractors (Builders), Letterloan Rd	2.46
9	Ballerin Business Park, 98-101 Boleran Rd	0.90
10	Hampton Conservatories, 218 Ballybogey Rd	1.35
11	Crowe Precast Concrete, 191 Agivey Road	0.37
12	Smyth Steel, 15 Gorran Rd	4.25
13	Star Fuels, Glasgort Road	1.55
14	Northstone (NI), Glasgort Road	1.61
15	Rafferty Roof Trusses, 169 Agivey Rd	1.46
16	Roe Engineering, 158 Castleroe Rd	0.40
17	S J C Hutchinson Engineering, 58A Drumagarner Rd	0.97
18	Moneycarrie Engineering, 43 Moneycarrie Rd	0.37
19	Reid Machinery Sales & Precision Engineering, 101 Carrowreagh Rd	0.79
20	Aghadowey Food Services & Creamery, Jct. Moneybrannon Rd Ballylintagh Rd	1.00
21	ESL Engineering, 11 Farranlester Rd	1.25
22	Farlow Engineering, 39 Ballynameen Rd	0.97
23	Old Manse Joinery, 32 Boveedy Rd	0.45
24	Aghadowey Conservatories and Accessories, 11 Greenhill Road, Aghadowey	0.17
25	Artie Henry Plant and Machinery, 26 Brokeagh Road, Garvagh	0.192
26	B Mullan and Sons, 19 Cam Road	2.571
27	Bradley Fuels, 40 Tirkeeran Road, Garvagh	5.288

28	A and R Variety (Salvage), adj 39 Tirkeeran Road	0.662
29	Industrial Estate - SRK Equipment Company, 31 Ardreagh Road, Clarehill	0.722
30	Causeway Tours, 57 Ballylagan Road, Cloyfin	0.184
31	Daniel Henry Plant and Machinery Hire, 25 Tirkeeran Road	0.366
32	EA Martin and Son Wholesale Tools Distributor, 69 Drumsarragh Road	0.313
33	Entyre Cycling, 17 Culbane Road	0.196
34	Ergana Corn Mill, 143 Edenbane Road	0.633
35	Hilltop Garage, 22 Cranagh Road	0.293
36	HP O'Kane, 10 Glen Road, Garvagh	0.451
37	Ivansons, Oil Fuel Distributor, Dunhill Road	0.187
38	J Wilsons Agricultural Ltd, 75 Drumcroon Road	0.71
39	McIntrye Brothers, 186 Dunhill Road	0.198
40	McMaster Engineering, 31 Movenis Hill, Garvagh	0.874
41	Millar Tractors Ltd, 15 Glenleary Road	0.982
42	Oliver Transport Services Ltd, 16 Exorna Lane, Castlerock	0.835
43	RDS Technology, 136 Curragh Road, Aghadowey	0.464
44	RTS Plant, 23 Plantation Road	0.298
45	Weldtec Industrial Supplies, 232 Drumcroon Road	0.676
46	William Taylor Agricultural Equipment, 56 Cashel Road	0.297

Limavady Area

Map Ref	Business	Area (hectares)
1	William McLoughlin & Sons Carlaragh Rd	6.51
2	KPL Utilities 9 Carnanbane Rd	0.55
3	Geoffery Conn & Son Food Manufacturing 44 Tully Rd	1.61
4	V Semple & Son Food Manufacturing 28 Betts Rd	0.45
5	Drenagh Saw Mills Drumsurn Rd	2.65
6	Limavady Gear Co 51 Ballykelly Rd	1.25
7	Lynch Industrial Units & Tree Surgeon, 2 Brighter Rd	1.65

8	Hillcrest Joinery Muldonagh Road	0.57
9	Duffy Pre-Cast Concrete 103 Dowland Rd	0.58
10	Industrial Units, Longfield Beg	3.64
11	MCM Trailers, 748 Feeney Road, Dungiven	0.663

Moyle Area

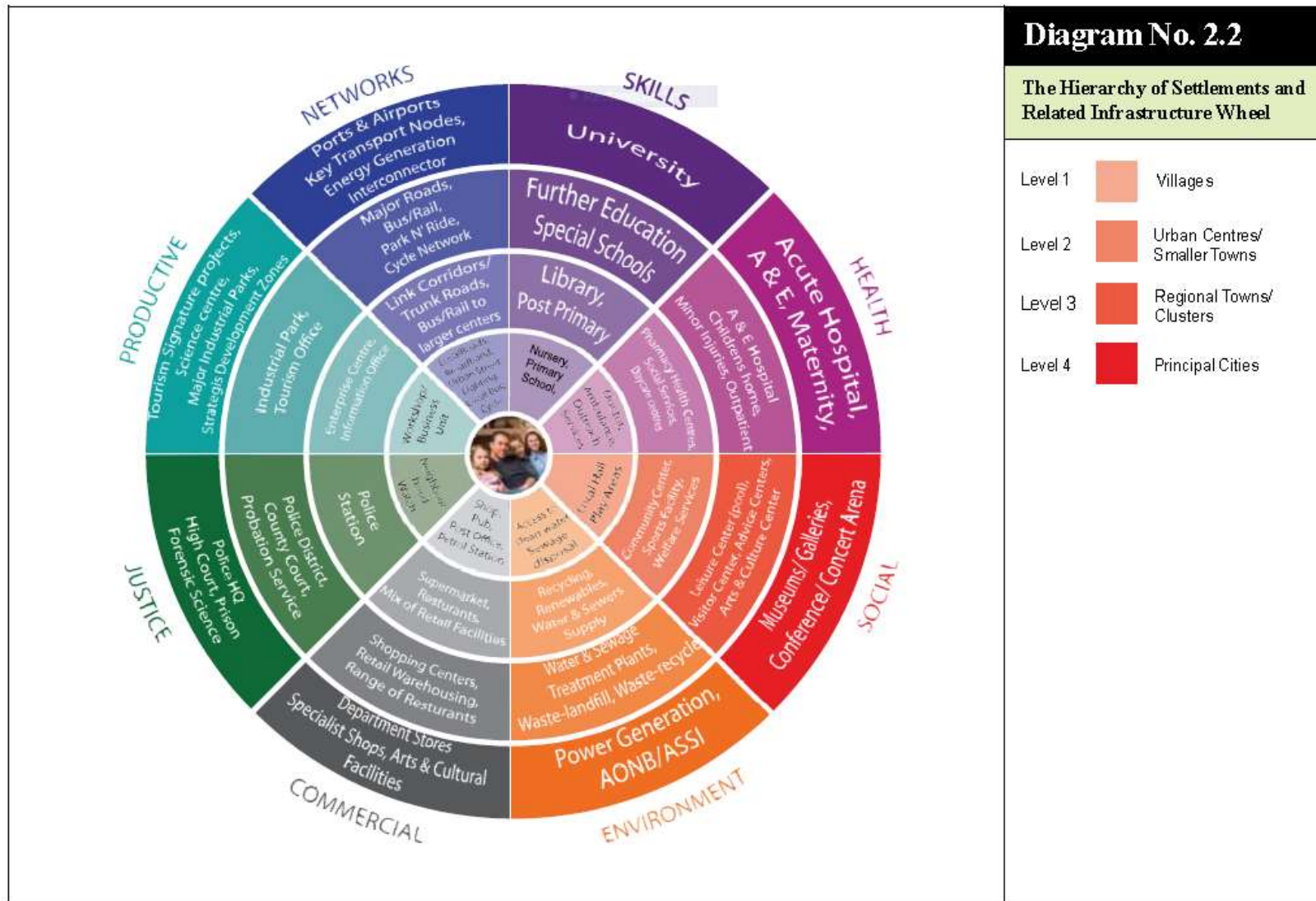
Map Ref	Business	Area (hectares)
1	Green Glens Recycling Ltd, Ballyemana Road, Cushendall	0.26
2	Cushendall Ornamental Concrete, Adj 14 Tromra Road	0.28
3	Glens of Antrim Potatoes, 118 Middlepark Road, Cushendall	3.06
4	McMullan Sea foods, 5 Glenariff Road, Waterfoot	0.22

Location of Quarries in the Council Area and Associated Map 2 at end of paper

Map Reference	Quarry Name	Location
1	Crocknamolt Quarry	East of Portrush
2	Keady Quarry	East of Limavady
3	Blackhill Quarries	South of Coleraine
4	Ballyboyland	East of Ballymoney
5	Carnanane Sand Pit	South West of Dungiven
6	Magheramore Quarry	South West of Ballycastle
7	Dunloy Quarry	Dunloy
8	Ardverness	Macosquin
9	Croaghan Quarry	Macosquin
10	Tully Sand Pits	Limavady
11	Kilhoyle Quarry	South East of Limavady
12	Cam Quarry 1	Macoquin
13	Cam Quarry 2	Macoquin
14	Craigall Quarry	Macoquin
15	Murnee Pit	Dungiven
16	Corkey Quarry	Corkey

Source: Quarry Products Association Northern Ireland; local knowledge

Appendix 5: RDS 2035, The Hierarchy of Settlements and Related Infrastructure Wheel



Source: Strategic Investment Board Limited, 2008

Appendix 6: Definitions of Convenience and Comparison Shopping (National Retail Planning Forum, Retail Definitions Working Group, October 2008)

Convenience: food and non-alcoholic beverages, tobacco, alcoholic beverages, newspapers and periodicals, non-durable household goods such as cosmetics, cleaning products, stationary.

Comparison: including clothing materials and garments, shoes and other footwear, materials for the maintenance and repair of dwellings, furniture and furnishings, carpets and other floor coverings, household textiles, major household appliances whether electrical or not, small electrical household appliances, tools and miscellaneous accessories, glassware, tableware and household utensils, medical goods and other pharmaceutical products, bicycles, books and stationary, plants, jewellery, games, toys, hobbies, camping equipment.

Table 7: Summary of the Range of Land Uses in Town Centres as a Percentage at 2015

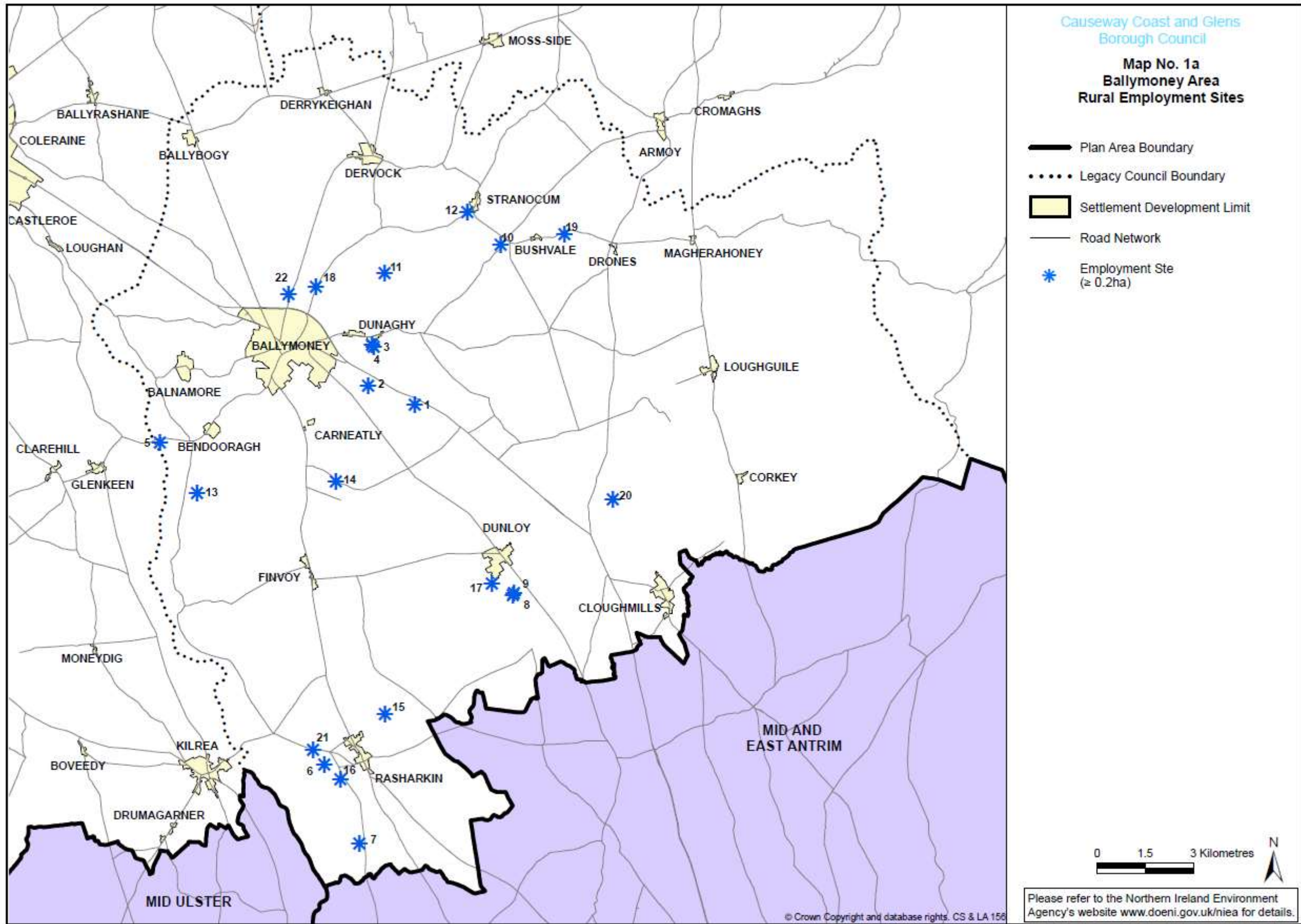
Settlement	Use Class				
	A1: Shops	A2: financial, professional and other services	C1: Dwelling houses	D1: Community and Cultural Uses	Vacant
Ballymoney	34	11	7	4	21
Coleraine	35	11	11	4	16
Limavady	35	8	14	6	14
Ballycastle	33	4	21	4	15
Dungiven	13	5	24	5	31
Garvagh	27	2	17	8	18
Kilrea	29	3	29	4	6
Portrush	40	2	8	4	10
Portstewart	29	6	20	2	10
Bushmills	40	2	30	2	17
Cushendall	27	2	25	7	12

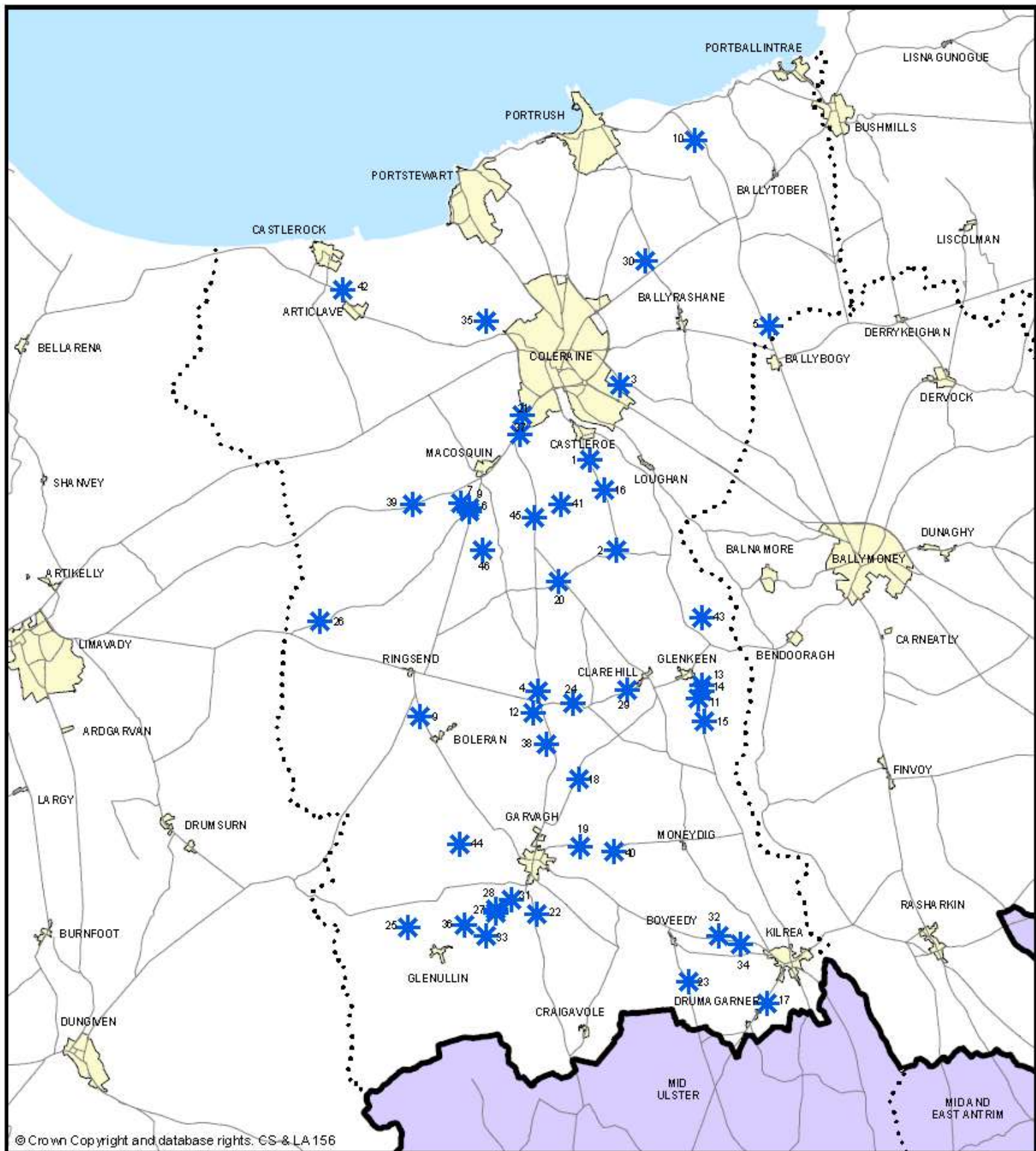
Table 8: Comparison of Town Centre Vacancy Levels 2008, 2009, 2012, 2015 & GL Hearn 2014

Settlement	Vacancy Rates in Each Defined Town Centre as a Percentage of the Total Number of Units at Ground Floor				
	2008	2009	2012	2015	GL Hearn 2014
Ballymoney	14.3	15.0	22.0	21.0	19
Coleraine	13.3	13.2	15.7	16.0	14
Portrush	19.4	13.9	5.9	10.0	n/a
Portstewart	17.5	14.7	9.4	10.0	n/a
Garvagh	17.3	19.6	26.9	18.0	n/
Kilrea	10.8	8.8	9.5	6.0	n/a
Limavady	5.9	3.9	13.0	14.0	10
Dungiven	12.7	24.7	26.3	31.0	n/a
Ballycastle	8.8	12.3	18.2	15.0	n/a
Bushmills	20.4	23.5	19.0	17.0	n/a
Cushendall	5.9	3.9	5.0	12.0	n/a
N Ireland Average (excluding Craigavon at 1%)					15.0
UK national Average					12

Table 9: Comparison of Potential Future Retail Capacity for the Hubs (Net Sq Metres) Taken from Various Reports

Town	Type of Goods	DoE Calculations (2005) to 2016	Driver's Jonas Report (2003) 2005 to 2016	DRD Masterplan Calculations (2011) to 2020
Coleraine	Convenience	2,447-7,060	5,519-9,836	0
	Comparison	34,797-41,080	48,047-63,941	0
Ballymoney	Convenience	395-1,140		500-1,400
	Comparison	9,514-1,232		900-2,800
Ballycastle	Convenience	184-534		300-1,100
	Comparison	1,544-2,544		1,000-1,900
Limavady	Convenience	267-770		590
	Comparison	6,097-8,198		0





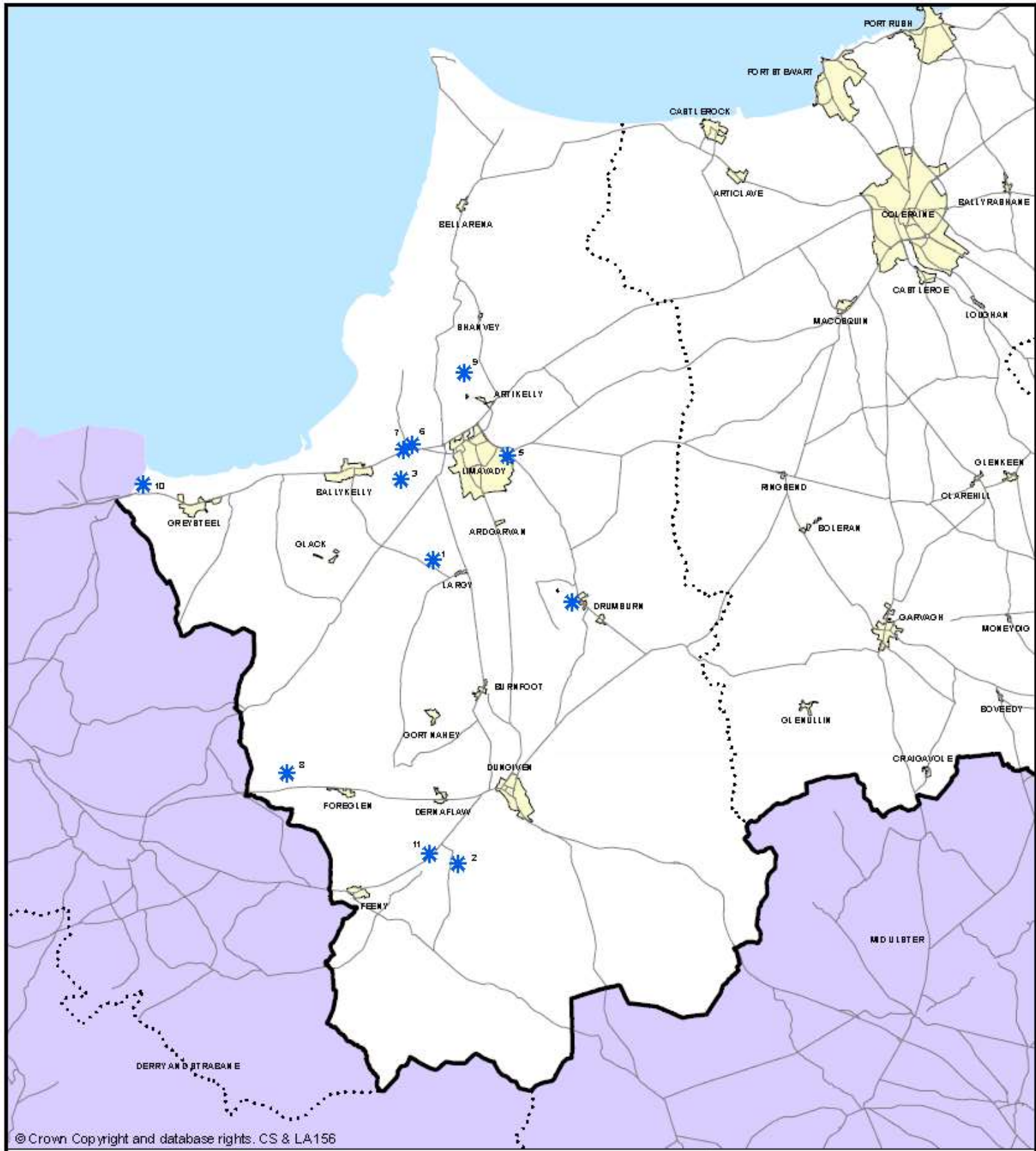
© Crown Copyright and database rights. CS & LA 156

Causeway Coast and Glens Borough Council
Map No. 1b - Coleraine Area Rural Employment Sites

- Plan Area Boundary
- Legacy Council Boundary
- Settlement Development Limit
- Road Network
- Employment Site (≥ 0.2ha)

Please refer to the Northern Ireland Environment Agency's website www.doeni.gov.uk/niea for details.





© Crown Copyright and database rights. CS & LA156

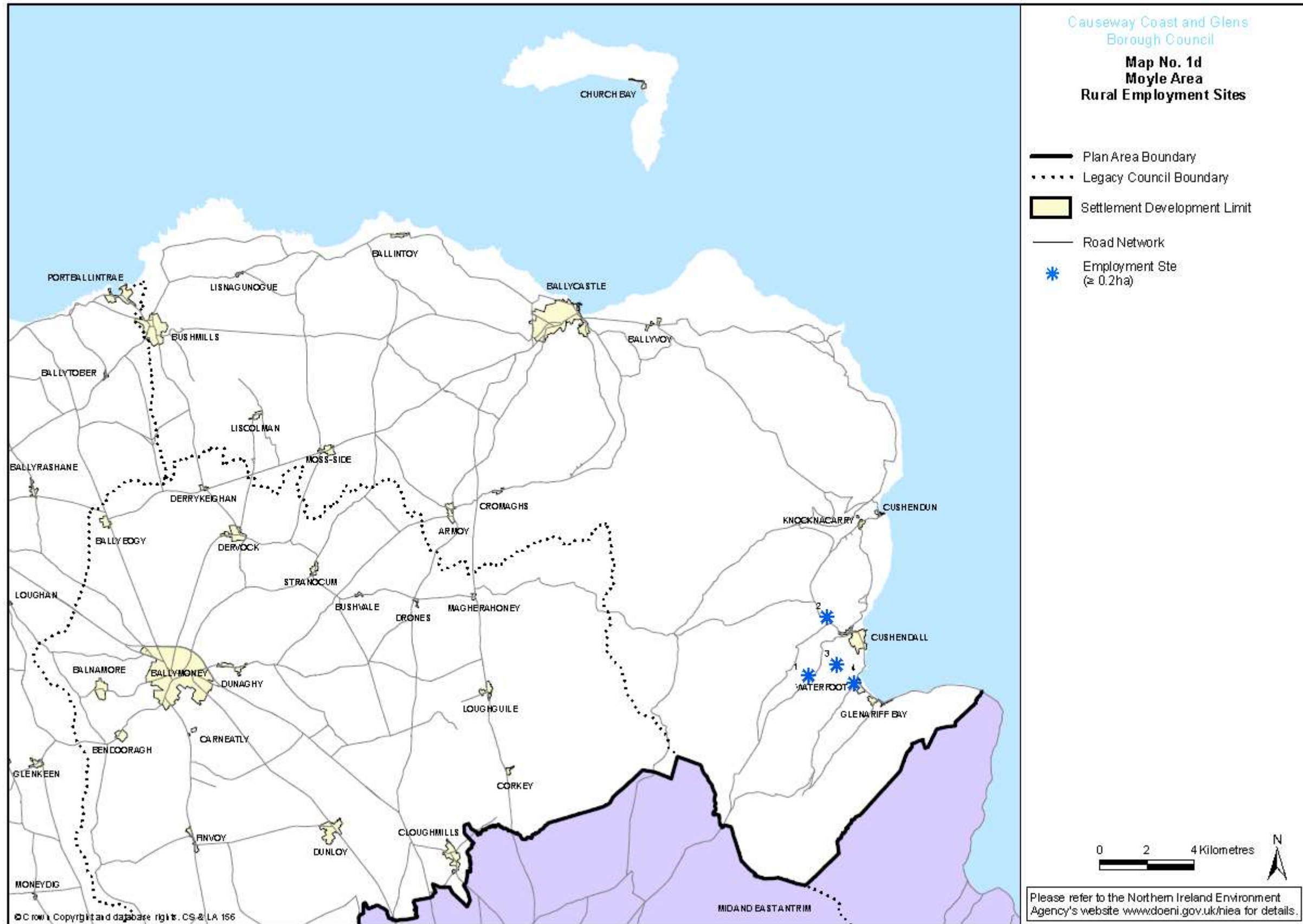
Causeway Coast and Glens Borough Council

Map No. 1c - Limavady Area Rural Employment Sites

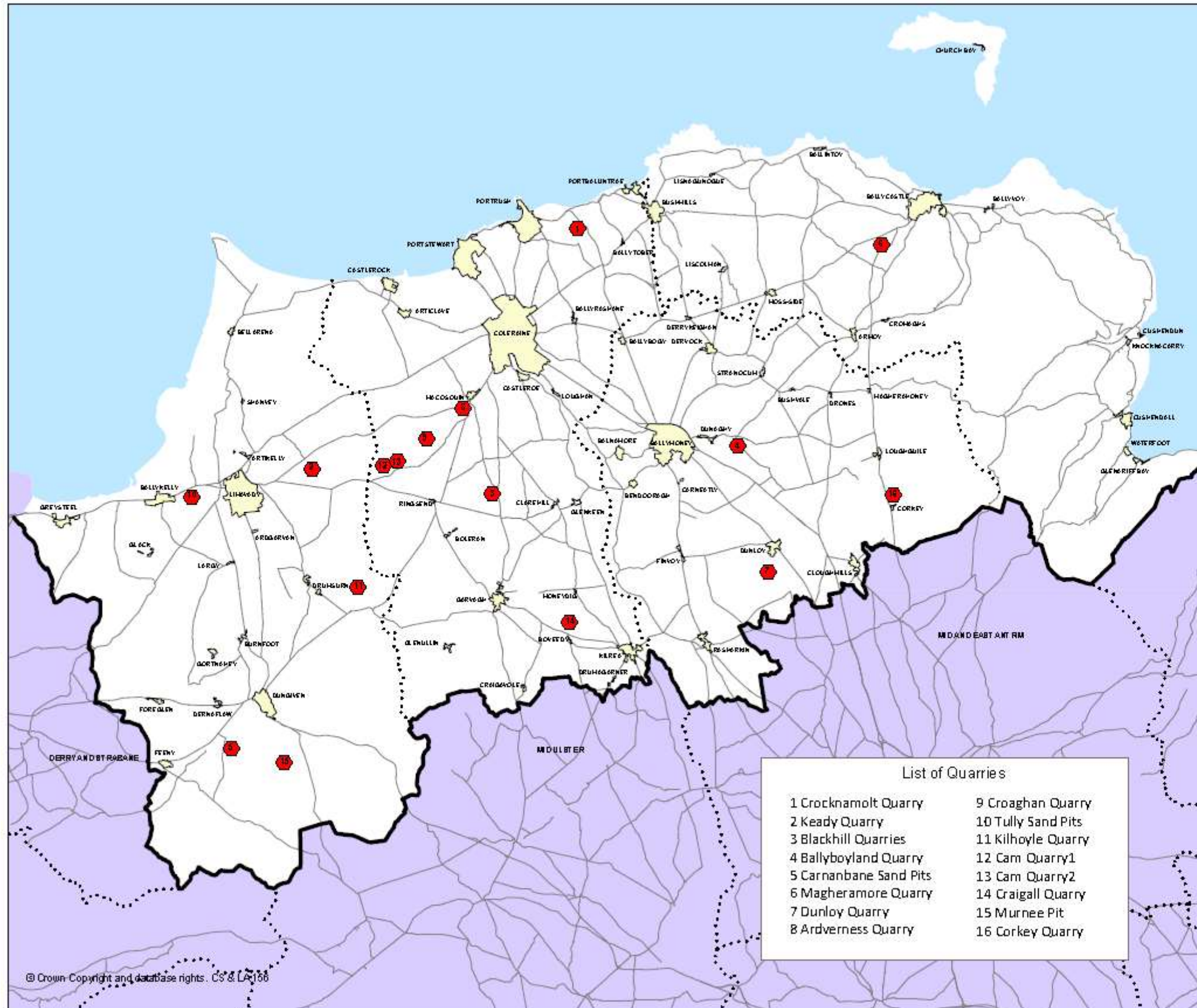
- Plan Area Boundary
- Legacy Council Boundary
- Settlement Development Limit
- Road Network
- * Employment Site (≥ 0.2ha)

Please refer to the Northern Ireland Environment Agency's website www.doeni.gov.uk/niea for details.

0 2 4 Kilometres N



**Map 2 : Location of
Quarries in the Council Area**



- Plan Area Boundary
- Legacy Council Boundary
- Settlement Development Limit
- Road Network

For Information Only
 Quarry

- List of Quarries
- | | |
|------------------------|--------------------|
| 1 Crocknamolt Quarry | 9 Croaghan Quarry |
| 2 Keady Quarry | 10 Tully Sand Pits |
| 3 Blackhill Quarries | 11 Kilhoyle Quarry |
| 4 Ballyboyland Quarry | 12 Cam Quarry1 |
| 5 Carnanbane Sand Pits | 13 Cam Quarry2 |
| 6 Magheramore Quarry | 14 Craigall Quarry |
| 7 Dunloy Quarry | 15 Murree Pit |
| 8 Ardverness Quarry | 16 Corkey Quarry |

