

Wigan Borough Economic Market and Employment Land Assessment

Wigan Council

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1. Executive Summary

1.1 Study Context

- 1.1.1 AECOM was commissioned by Wigan Council to undertake an Economic Market and Employment Land Assessment (EMELA). The study sets out a detailed evidence base to support the Local Plan 2040, and specifically the borough's future approach to the provision, protection, release and enhancement of employment land and premises.
- 1.1.2 The National Planning Policy Framework (NPPF)¹ outlines the principles that Local Planning Authorities should follow in preparing their evidence base to inform employment land policies. The need for Local Planning Authorities to produce an up-to-date employment land evidence base and the suggested format is outlined in national Planning Practice Guidance (PPG)². The approach to the study reflects the requirements and directions of this guidance.
- 1.1.3 The scope of the study includes employment land defined as office and industrial land and businesses, falling under the following use classes:
- Offices:
- E(g)(i) Offices; and
 - E(g)(ii) Research and Development.
- Industrial:
- E(g)(iii) Light industrial;
 - B2 General industrial; and
 - B8 Storage or distribution
- 1.1.4 The study also considers the Sui Generis (SG) use class, within land in employment uses, although this is not central to the EMELA and forecasting of demand for land for SG uses is not considered.
- 1.1.5 The area of assessment is the whole of Wigan Borough. In all 35 primary employment areas and 22 other undesignated employment areas were assessed, as defined by Wigan Council, alongside sites allocated in the Places for Everyone Plan. Sites not identified within the existing employment areas/allocations in the Places for Everyone Plan are considered to form part of the total supply presented alongside property market information (Section 6).

1.2 Strategic and Policy Context

- 1.2.1 The NPPF provides overarching guidance on the Government's development aims and describes the Government's vision for building a strong, competitive economy. It emphasises that Local Plans and Employment Needs Assessments should present robust evidence to support clearly defined designations and allocations of land for employment uses. It sets out a series of recommendations which policymakers should follow to help create conditions in which businesses can invest.
- 1.2.2 The need for an evidence base to assist in understanding existing business needs, local circumstances and market conditions is also emphasised in the national PPG. The PPG is a web-based resource providing detailed guidance on the implementation of the NPPF which undergoes regular updates. Guidance includes 'Housing and Economic Land Availability Assessments', which was updated in July 2019 and 'Housing and Economic Needs Assessments' which was updated in December 2020.
- 1.2.3 At a regional level, policies such as the Greater Manchester Strategy and the Places for Everyone Plan place emphasis on increasing prosperity across the sub-region, encouraging economic opportunities to be established which should benefit all. The economic position of northern England is

¹ Department for Levelling Up, Housing and Communities (2023), National Planning Policy Framework.

² Ministry for Communities, Housing and Local Government, (2019); Planning Practice Guidance.

also discussed, highlighting the performance gap and emphasising the need to close this by capitalising on its main strengths: advanced manufacturing, energy, health innovation, and digital. Places for Everyone Policy JP-Strat 8 also recognises the Wigan-Bolton corridor as an opportunity for growth, holding substantial importance in enhancing competitiveness and employment through its transport connections, particularly for logistics and industrial sectors.

- 1.2.4 At a more local level, it is evident that there is an identified need to bring forward a range of employment sites to facilitate this growth. Historically, some employment sites have been lost due to lack of market demand and viability issues, indicating the need to ensure that new sites are well planned within the economic context of Wigan Borough to be successful. Connectivity and transport are key topics across local policies, with Wigan Borough's proximity to the motorway network identified as a strength to support future employment growth.

1.3 Functional Economic Market Area

- 1.3.1 The PPG requires local planning authorities (LPAs) to assess development needs in consideration of other LPAs in a relevant functional economic market area (FEMA), to be defined as part of needs assessments. Analysis of Wigan Borough's travel to work area, housing market area, property market area, and economic governance and partnerships area, indicates that the borough is relatively self-contained economically, with some important connections either from an economic governance perspective (administrative boundaries), market characteristics (housing and commercial property markets) and connectivity (travel to work and transport infrastructure).
- 1.3.2 Based on the assessment conducted, Wigan Borough is particularly connected with two other local authority areas: Bolton and Salford. This is based on outflow self-containment, the road and rail network, housing and property market areas, and economic governance areas. Therefore, these three local authorities form Wigan Borough's FEMA.
- 1.3.3 However, it is noted that Wigan Borough does have strong relationships with neighbouring local authorities that fall outside of this definition, such as Warrington, St Helens, West Lancashire and Chorley, and these areas are considered within the property market analysis (Section 6) in light of this.

1.4 Wigan Borough's Economic Performance

- 1.4.1 In 2021³, the average economic activity rate in Wigan Borough was 58.8%, higher than the FEMA (58.2%), Greater Manchester (57.4%), and England (58.6%). However, jobs density, which is the number of jobs in an area divided by the working age resident population (aged 16 to 64), is estimated to be 0.61 in Wigan Borough, which is considerably lower than the equivalent rate across the FEMA (0.75), Greater Manchester (0.81), and England (0.86). This suggests a lower supply of jobs in the borough relative to its working age population.
- 1.4.2 Wigan Borough has a higher proportion of employment in manufacturing, at 9.2% of all jobs compared with the national average of 7.7%, linked to its strong manufacturing engineering base and specialisms such as food manufacturing. However, the economy of Wigan Borough is increasingly becoming characterised by the service sector. The largest employment sector in the borough was health, employing 15.6% of workers, representing a greater share than in the FEMA, Greater Manchester and England (13.1%).
- 1.4.3 The sectoral breakdown of employment in Wigan Borough highlights the importance of the foundational economy to the borough's performance, with the employment breakdown by industry in Wigan demonstrating a relatively higher proportion in foundational industries (48%), compared with the FEMA (42%), Greater Manchester (41%) and England (41%).
- 1.4.4 Over the last decade, the outlook on skills and qualifications has improved in Wigan Borough though a lower proportion of residents hold NVQ Level 4+ qualifications, and a higher proportion have no qualifications, compared with the FEMA, Greater Manchester and the national average. This is reflected in the borough's productivity performance, with GVA per worker lower than the comparators, with the gap in performance persistent and widening since the late 2000s, likely driven by a more muted recovery from the global financial crisis in the borough.

³ Office for National Statistics (2021). ONS Census 2021.

1.5 Property Market Assessment

- 1.5.1 The property market assessment considers the office and industrial property markets in Wigan Borough, set within the context of the wider FEMA, Greater Manchester and England.

Office Market Office Market [E(g)(i) and E(g)(ii)]

- 1.5.2 The office market in Wigan Borough currently accommodates approximately 257,000 m² of floorspace and comprises around 21% of office floorspace across the FEMA⁴. Premises are mostly small in size, and clusters of office space can be found in Wigan town centre and Leigh. Almost half of buildings were constructed before 1960, with very few being constructed since 2010.
- 1.5.3 Analysis shows that demand for office premises in Wigan Borough is generally positive with a vacancy rate of 2.7%, considerably lower than averages in the FEMA, Greater Manchester, and England. Net absorption has also been positive over the last decade, however, there has been a slackening of demand over the past 5 years.
- 1.5.4 Despite positive trends in vacancy rates and net absorption, rental values are considerably lower than in the FEMA and Greater Manchester, and nationally. Indeed, the market rent for office space in Wigan Borough is the lowest across Greater Manchester as of Q3 2023. The borough experiences rental values that sit 34.7% lower than the FEMA and 87.8% lower than the average across Greater Manchester.
- 1.5.5 In regard to viability, market yields for office space in Wigan Borough are higher than comparator areas, indicating a higher risk profile, which can deter investment. The borough is an affordable place to rent office floorspace from a financial viewpoint and is maintaining its level of affordability. However, this could be impacted by recent increases in construction and maintenance costs as noted during consultation with local agents.

Industrial Market [E(g)(iii), B2 and B8]

- 1.5.6 The industrial market in Wigan Borough accommodates approximately 90,000 m² of light industrial floorspace and 1,950,000 m² of general industrial and warehousing floorspace. Industrial activity is clustered in Wigan, Leigh, Hindley, and Golborne, and there are various industrial estates on the outskirts of other towns.
- 1.5.7 The light industrial market occupies 25% space across the FEMA, being characterised by mostly small premises, and contains a notable proportion of buildings which were constructed during the 1980s. Vacancy rates for light industrial space are in line with the comparator geographies, however market rent is well below the national average. Rents in Wigan Borough have risen steadily over the last decade whilst they have increased much faster nationally. This suggests that affordability could be increasing relatively in the borough. In addition, market yield has decreased in the borough over time, suggesting that the attractiveness for investment has improved.
- 1.5.8 General industrial and storage and distribution occupies a larger proportion of space in the FEMA at 37% and is characterized by stock that was generally constructed in the 1980s onwards. Vacancy rates are similar to the comparator geographies. Rental values are also in line with the other geographies and have been consistently over the past decade. However, there has been an increase in rental values for warehousing space in recent years according to local agents, likely due to an increase in e-commerce.

1.6 Wigan Borough's Economic Market Potential

- 1.6.1 As set out in the Places for Everyone Plan⁵, in recent years, the northern areas of Greater Manchester have seen relatively low levels of growth overall compared to other parts of the city region, and this is forecast to continue. In order to reach their potential and deliver economic prosperity, these areas need to capitalise on their many strengths, such as their distinctive landscapes, proud communities and manufacturing bases.

⁴ CoStar 2023

⁵ Greater Manchester Combined Authority (2024). Places for Everyone Plan. Available at: <https://www.greatermanchester-ca.gov.uk/media/4838/places-for-everyone.pdf>

- 1.6.2 This section of the report sets out the key sectors in Wigan Borough and their outlook; where the borough's strengths lie and potential growth areas, considering future economic trends, that could drive economic prosperity. Core sectors include Manufacturing / Advanced Manufacturing, Transport and Logistics, Construction and Health and Social Care, which link to the importance of the foundational economy in Wigan Borough, while trends associated with increased digitisation, health innovation and net zero and decarbonisation are likely to have a considerable impact on the future direction of these sectors and Wigan's economic performance.
- 1.6.3 The analysis and consultation undertaken highlighted a range of wider factors that are potential determinants of site selection or investment in sites and premises across the borough, including infrastructure, labour availability and skills and quality-of-life factors, such as housing, schools and the availability of amenities. These are vital factors for the Council and its partners to consider in order to help the borough meet its potential, in line with Wigan Council's aspirations to create a more inclusive economy, and a prime location in which to live, work, invest and visit.

STRENGTHS	WEAKNESSES
<ol style="list-style-type: none"> 1. Strong economic foundations in core sectors of construction, manufacturing, health and social care and logistics. 2. Net increase in businesses in past 5 years. 3. Low vacancy rates across employment land use classes (office and industrial) 4. Apprenticeship take-up exceeds the national average. 5. Economic activity levels exceed Greater Manchester and the national average. 6. Proximity to the M6, M58, M61, M60 and A580 (key strategic routes) and wider transport infrastructure. 7. Strong demand for industrial (B2) and warehousing and distribution (B8) floorspace over the past decade, robust rental values and yields broadly in line with Greater Manchester and national averages. 8. Higher proportion of new industrial floorspace (delivered since 2010) compared with Greater Manchester. 9. Strong foundation of high-performing schools and colleges. 10. Relationships between employers and the college network in Wigan Borough. 11. Quality of life factors such as the relatively lower cost of housing, high-quality neighbourhoods, green space and the natural environment. 	<ol style="list-style-type: none"> 1. More limited employment and opportunities in higher productivity sectors such as ICT, professional services and financial services, leading to highly skilled residents leaving the borough / commuting outside for work. 2. Limited number of large, anchor firms, viewed as meaning reduced opportunities for skills development, progression and retention within Wigan. 3. Educational attainment lags other Greater Manchester boroughs at higher levels (NVQ Level 3 and 4+). 4. Low job density causes high levels of outward commuting. 5. Viability challenges, particularly for office uses with limited office floorspace delivered since 2010 vs comparators. 6. Productivity gap has widened vs Greater Manchester and national average since the global financial crisis. 7. In-borough connectivity noted by consultees to be challenging, leading to long journey times. 8. Amenity and quality of offer currently available in Wigan and Leigh town centres. 9. Negative/outdated external perception of Wigan that does not accurately reflect life in the borough.
OPPORTUNITIES	THREATS
<ol style="list-style-type: none"> 1. Net zero and decarbonisation has the potential to drive significant investment in Wigan Borough's core sectors and 	<ol style="list-style-type: none"> 1. Macroeconomic influences: inflation, interest rates, cost of living, Covid 19, Brexit etc. which have historically resulted in steep and prolonged downturns, slow returns and short

<p>present inward investment opportunities⁶.</p> <ol style="list-style-type: none"> 2. Potential for large scale development for consented employment uses at M6 Junction 25. 3. Near/re-shoring of manufacturing to increase resilience/support ESG goals could present inward investment opportunities. 4. Improvements in educational attainment, linked to the strong provider network, having the potential to continue to narrow the educational attainment gap. 5. Potential to realise productivity improvements across foundational economy businesses. 6. Town centre regeneration projects (e.g. The Galleries, Eckersley Mills) present opportunities to increase Wigan's attractiveness to potential occupiers. 7. Ambitious housebuilding plans offer the potential to attract and retain working age residents to the borough. 8. Potential to further develop partnerships between educational providers and employers to deliver against skills gaps – particularly in relation to emerging themes such as digital and net zero / decarbonisation. 9. Opportunities with partners locally and across Greater Manchester to re-position and promote Wigan Borough as a place to work, live, play and invest. 	<p>upswings in Wigan Borough's economic cycle.</p> <ol style="list-style-type: none"> 2. Changes in minimum energy efficiency standards (MEES) necessitating the upgrading, retrofitting and/or replacement of building stock, with the challenge more acute for office stock in Wigan. 3. Ageing population could lower participation rates in the workforce.
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1.7 Current Supply

- 1.7.1 A total of 57 existing employment areas, as defined by Wigan Council, form the basis of this assessment. These comprise of 35 primary employment areas and 22 other undesignated employment areas and sites that have been identified across the borough. An assessment of Wigan Borough's vacant sites, within existing employment areas and sites allocated in the Places for Everyone Plan, is also undertaken, including 93.08 hectares across 7 sites with planning permission, and 52.39 hectares across 10 sites without planning permission.
- 1.7.2 The assessment of each employment area and vacant site was informed by Wigan Council monitoring data and ratified by desk-based investigation and a site survey undertaken in August 2023. This focused on a range of criteria including building age and condition (where applicable); the quality of the public realm, environment and surroundings; access to the primary road network/motorway and proximity to public transport; compatibility of surrounding land uses; the amount of vacant floorspace; current and future market attractiveness and the suitability for meeting the needs of Wigan Borough's core/cross-cutting sectors.

⁶ As noted by the EY Attractiveness Survey (June 2023), if the UK is to fully realise the opportunities that manufacturing creates — and is to build the industrial capacity it needs to reach net zero — its proportion of FDI projects needs to be higher.

- 1.7.3 The larger and higher performing employment areas in industrial use tend to be located with direct or indirect access to the strategic road network or other main arterial routes (such as the M6, A580 and A49), with employment areas less well connected to the road network often being smaller, offering older/poorer quality buildings and limited formal public realm.
- 1.7.4 Outside of the main town centres, office space tends to be provided alongside other industrial uses in business park settings and industrial estates, mainly comprising spaces ancillary to industrial uses with small amounts of standalone commercial office space.
- 1.7.5 Within the existing employment areas, there is evidence of stock with stronger alignment with the requirements of Wigan Borough's core and cross-cutting sectors. These include:
- Hope Carr/Leigh Commerce Park (8) and Gibfield (12) in the Atherton, Leigh and Tyldesley area.
 - Stone Cross Park (1), Golborne Enterprise Park (2), Newton Road (4), Moss Industrial Estate (5), Land Gate (34) and South Lancashire Industrial Estate (36), in the Hindley, Abram, Golborne and Ashton-in-Makerfield area.
 - Seaman Way (17), Westwood Park (20), Wigan Pier Business Park (21), Martland Park and Heinz (25), Lamberhead Industrial Estate (29), Smithy Court and Beecham Court (30) and Warrington Road Hawkley (32), in the Wigan, Ince, Standish and Orrell area.
- 1.7.6 In relation to the vacant sites in Wigan Borough, the analysis highlights that, despite some higher quality sites that demonstrate relatively strong marketability, such as Westwood Park (20), Warrington Road, Hawkley (32) and Land at M6 Junction 25, few of the vacant sites score strongly across multiple domains. Taken with evidence of barriers to development and limited site activity or developer interest, the analysis of vacant sites highlights that the available employment land in Wigan Borough currently lacks the quality profile to align with occupants' likely requirements across the borough's core and cross-cutting sectors, or is subject to constraints that could limit its potential for development.

1.8 Future Floorspace and Land Requirements

- 1.8.1 The approach to assessing future employment floorspace and land requirements is in line with Planning Practice Guidance on economic needs assessments. The future demand assessment considers three different approaches/scenarios to determine the future land requirements in Wigan Borough:
- Scenario 1: Labour Demand – based on the land needed to accommodate expected employment growth in the borough, as per the latest employment forecasts from Experian.
 - Scenario 2: Past Trends – trend-based scenario based on the continuation of historical net absorption rates, sourced from CoStar. This analyses the net absorption of floorspace – i.e. the quantum of net floorspace occupied over a period of time (i.e. move-ins minus move-outs) based on lease deals, a proxy measure of demand – by use class over the period 2013-2022 and extrapolates these trends over the assessment period.
 - Scenario 3: Policy On – the employment levels that could be possible, in line with Wigan Council's aspirations to create a more inclusive economy, that creates a high-quality place to live, work, invest and visit. This applies adjustments to the employment forecasts under Scenario 1, based on improvements to Infrastructure; Labour Availability and Skills; and Environment across the borough.
- 1.8.2 The analysis shows that up to 2040 there is a projected (net) requirement for between approximately 33,776 m² (Scenario 1) and 89,402 m² (Scenario 3) office floorspace in Wigan Borough. This would translate to a land requirement for office uses of between 3.4 ha and 8.9 ha.
- 1.8.3 In relation to industrial floorspace, the analysis predicts a net requirement for between 205,800 m² (Scenario 1) and 557,809 m² (Scenario 3) of floorspace up to 2040. This would translate to a land requirement for industrial uses of between 45.3 ha and 126.0 ha.

Preferred Scenario

- 1.8.4 The scenarios set out within this section forecast varying changes in floorspace in Wigan Borough across the Local Plan period; with a more modest growth outlook forecast under Scenario 1 (Labour

Demand); whereas Scenario 2 (Past Trends) and Scenario 3 (Policy On) project a stronger outlook for growth.

- 1.8.5 Scenario 3 (Policy On) presents an ambitious growth outlook in line with aspirations held by the Council to create a more inclusive economy, that creates a high-quality place to live, work, invest and visit, and wider growth drivers set out in Places for Everyone. This is not only reflected in the quantum of employment land forecast over the plan period, but also in the breakdown of land requirements which place a greater emphasis on office uses in line with local growth aspirations to support higher value service activities and attract optimal occupiers in the industrial market.
- 1.8.6 As such, Scenario 3 (Policy On) is considered the preferred scenario for future floorspace needs and employment land requirements for all employment land uses in the borough over the new Local Plan period to 2040.

1.9 Comparison Between Supply and Demand

- 1.9.1 This section compares the projected future demand for office and industrial floorspace and land up to 2040, with the existing supply conditions in the borough.

Net Requirement for Office and Industrial Land

- 1.9.2 For office floorspace [(E(g)(i) and E(g)(ii))] there is projected to be a (net) requirement of approximately 89,402 m² office floorspace in Wigan Borough. This would translate to 8.9 ha of employment land for office uses.
- 1.9.3 Over the Local Plan period, the analysis predicts a net requirement of 557,809 m² of industrial floorspace [E(g)(iii), B2 and B8] in Wigan Borough. This would translate to 126.0 ha of employment land for industrial uses.

Pipeline

Employment land supply sites without planning permission

- 1.9.4 A number of existing employment areas were identified as having land allocated for development within local plan policy, which is yet to come forward, as well as sites which are allocated in the Places for Everyone Plan. This available employment land totals 52.39 ha, with much of this capacity at South Lancashire Industrial Estate (19.5 ha) and West of Gibfield (11.4 ha).

Planning Pipeline – Employment Sites with planning permission

- 1.9.5 If all approved planning applications were to come forward for development, 238,914 m² of floorspace would be delivered when both gains and losses are considered. The vast majority of this floorspace is supported through the approved application at M6 Junction 25 (113,965 m²), South Lancashire Industrial Estate (58,064 m²), Chaddock Lane (32,826 m²) and Plots 2 & 3 Warrington Road, Hawkley (10,492 m²). This translates to 93.1 ha of employment land.
- 1.9.6 If implemented, these permissions may serve to reduce overall land requirements. However, there is a possibility that some developments may not come forward or be developed in different quantities by use class than has been consented, for example if amendments to the planning applications are made and as such these have not directly been deducted from the stated net requirements. Nevertheless, due to factors such as site size, location and constrained access to the strategic road network, a notable proportion of these approvals are not anticipated to make a transformational impact on the borough's economy.
- 1.9.7 The outcome of the comparison between employment land demand and available supply, based on the current portfolio of sites / allocations across the borough, is set out in Table 1. This indicates that, taking into account pipeline sites, there is sufficient supply available to meet projected demand in Wigan Borough over the Plan period. However, as noted above, the borough's available employment land supply lacks the quality profile to align with occupants' likely requirements, and/or is subject to constraints that could limit the likelihood of it coming forward for development, while some developments in the planning pipeline may not come forward, or be developed in different quantities by use class than has been consented.

Table 1 Summary of Comparison Between Demand and Available Undeveloped Land
Scenario 3 (Policy On)

<i>Demand</i>	
A) Net Office Land	8.9
B) Net Industrial Land	126.0
C) Total Demand [A+B]	134.9
<i>Supply (Available Undeveloped Land)</i>	
D) Existing Local Plan allocated sites	52.4
E) Pipeline (ha)	93.1
F) Total Supply (Available Undeveloped Land) [D+E]	145.5
G) Total Supply – Total Demand [F-C]	10.6

- 1.9.8 Considering the suitability of Wigan Borough's existing employment areas and available land supply for continued employment use in line with potential drivers of current and future market demand for floorspace, as set out in Section 8, it is evident that there are a number of sites that have a quality profile somewhat below potential occupants' likely requirements, and for some current occupants given that very low vacancy rates generally indicate firms taking space where they can find it. This is particularly in relation to more peripheral or constrained industrial and storage/warehousing sites in the borough, which lack accessibility and have a poor quality profile in terms of building age/condition and quality/suitability of the overall environment.
- 1.9.9 Taking this into account alongside the lack of certainty in respect of the delivery of the planning pipeline it is considered that the supply of land that is suitable to meet economic development purposes in the borough will not meet needs over the Local Plan period. There is a requirement therefore to allocate new land which would deliver sites and premises which can better align with the requirements of the borough's core and cross-cutting sectors in terms of location, quality profile and environment.

1.10 Conclusions and Recommendations

- 1.10.1 The analysis set out within the EMELA forecasts increased demand for office and industrial floorspace within the borough over the Local Plan period to 2040, with this distinctly weighted towards industrial floorspace. Considering the quantum of land available at allocated sites and employment sites in the planning pipeline, this does result in a position whereby supply exceeds the demand for employment land in the borough. However, the analysis of existing employment areas and vacant sites presented in Section 8 highlights that the supply of land is not suitable to meet the aspirations of the Council to improve the performance of the local economy, by attracting optimal occupiers, supporting higher value activities and moving up the value chain in the industrial market. Therefore, it will be important for the Council to consider the allocation of additional sites, or replacement of sites, in Wigan Borough to improve economic performance up to 2040.
- 1.10.2 The safeguarding of existing higher quality sites, to ensure there is a ready supply of premises and that vacant land and intensification opportunities can potentially be realised, is considered important in Wigan Borough. However, while it is important to protect employment land, there is also strong evidence of competition for space from non-employment uses such as housing. Employment land policies will therefore need to accommodate the Council's ambitions and objectives in these areas.
- 1.10.3 In practice, a flexible approach to the protection of employment land, that considers the merits of each individual site, is recommended to ensure that sites that are unlikely to remain suitable for ongoing employment use during the Local Plan period can be considered for alternative use, whilst those sites most appropriate to meeting needs continue to be protected. This approach would ensure that the over protection of sites, which could result in the inefficient use of assets and blight and deter investment, does not occur. Similarly, the under protection of sites, whereby the market intervenes prematurely to short-term demand indicators and adversely impacts the long-term provision of employment land, also does not occur.

- 1.10.4 When forming employment land policies, the Council should follow a balanced approach such that the employment activities of all business sizes, from start-ups to large headquarters, are supported and encouraged. The Council should also recognise that demand will vary by type of space and will therefore be geographically varied.

Recommendations

- 1.10.5 Based on the analysis and conclusions presented in this report, several recommendations in relation to employment land are presented.
- 1.10.6 This is one of several evidence base documents the Council will be considering that will feed into and inform its Local Plan evidence base. These are AECOM's independent recommendations, and the Council will subsequently consider these before drafting its own Local Plan policies.

R1: To meet the future requirements for office and industrial floorspace in Wigan Borough, the Council will need to make choices about which existing employment areas and sites to protect and to identify new sites for employment development to support growth and facilitate transformational change, in order to deliver against the aspirations of the Council to drive inclusive growth in higher value activities.

R2: Local Plan policy should provide criteria for determining if alternative uses should be permitted, to be applied across employment areas. Alternative uses will typically be most appropriate at less well performing areas.

R3: Local Plan policy should provide the conditions to support inclusive growth in line with the Council's aspirations, considering the range of potential influences on demand and development.

R4: The Council should seek to support occupiers and landlords in addressing the retrofitting challenge. To do so, the Council could draw upon local connections with occupiers and landlords and coordinate action to prevent the accumulation of 'stranded assets' across the borough.

R5: The Council should consider developing an affordable workspace policy which reflects the needs of start-up businesses and the foundational economy.

R6: The Council should continue to monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the plan period to 2040. This includes ensuring that permitted development rights and the introduction of Class E do not impact on the integrity of employment areas through facilitating the introduction of non-employment uses.

2. Introduction

2.1 Study Context

- 2.1.1 AECOM was commissioned by Wigan Council to undertake an Economic Market and Employment Land Assessment (EMELA).
- 2.1.2 The study sets out a detailed evidence base to support the Local Plan for the borough to 2040. On adoption, the new Wigan Borough Local Plan will form a key component of the borough's Development Plan, alongside the Places for Everyone Plan, a long-term development plan covering nine Greater Manchester boroughs for jobs, new homes, and sustainable growth.
- 2.1.3 By providing an assessment of the balance of supply and demand in the context of changing employment needs, trends and challenges this study will ensure that the Local Plan contains sufficient land and policy approaches to help the borough to meet its economic potential through to 2040 and beyond.
- 2.1.4 Employment land considered by the study is defined as land with business activities falling under office and industrial use classes. These include:
- E(g)(i) Offices;
 - E(g)(ii) Research and Development;
 - E(g)(iii) Light industrial;
 - B2 General industrial; and
 - B8 Storage or distribution.

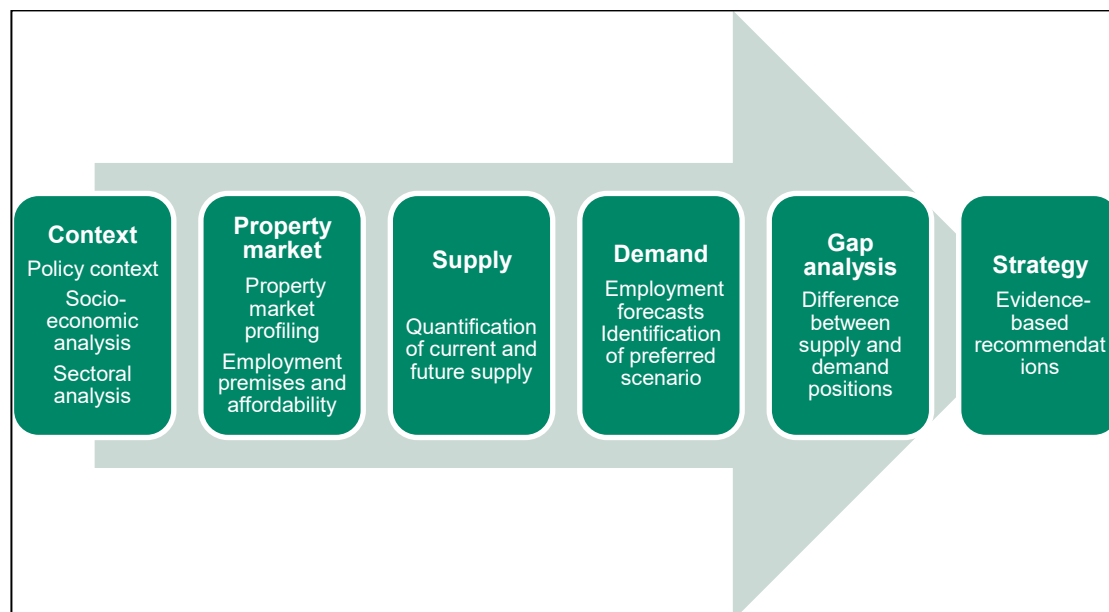
2.2 Objectives

- 2.2.1 The key requirements of the EMELA are set out below:
- Understand the existing situation – Review where the borough is economically, including its assets and constraints; provide a supply-side assessment of the quantity and quality of the borough's current employment land and its suitability to continue to support employment, and establish the existing Functional Economic Market Area (FEMA);
 - Assess future needs and gap analysis – Assess the likely future demand for employment space in the borough over the proposed Local Plan period; and compare quantitatively and qualitatively the supply of existing land against forecast future demand; and
 - Recommendations and actions – Set out evidence-based recommendations for appropriate employment land policies. This includes an assessment of recommendations for employment land policies that could support a higher jobs growth scenario in the borough, aligning with broader local economic growth objectives.

2.3 Approach

- 2.3.1 The National Planning Policy Framework (NPPF) outlines the principles that Local Planning Authorities should follow in preparing their evidence base to inform employment land policies.
- 2.3.2 The need for Local Planning Authorities to produce an up-to-date employment land evidence base and the suggested format is outlined in national Planning Practice Guidance (PPG) published in March 2014. The approach to the study reflects the requirements and directions of this guidance.
- 2.3.3 The main research elements of this EMELA are illustrated in Figure 1 below. The methodology and tasks at each stage conform to the PPG.
- 2.3.4 This report sets out certain elements of the EMELA, comprising the policy context; definition of the Functional Economic Market Area (FEMA); socio-economic and sectoral analysis; property market review and employment forecasting scenarios.

Figure 1 Approach to the EMELA



2.4 Report Structure

2.4.1 The remainder of this report is structured as follows:

- Section 3 presents a review of the relevant policy and strategic context including a review of local economic priorities;
- Section 4 defines the Functional Economic Market Area (FEMA) in which Wigan Borough is located;
- Section 5 provides a comprehensive analysis of socio-economic baseline conditions relevant to the study;
- Section 6 presents a review of the property market indicators in Wigan Borough. Reference is also made to comparator geographies;
- Section 7 considers Wigan Borough's key sectors, potential drivers of future growth and influences on demand for employment floorspace;
- Section 8 presents the key qualitative and quantitative results of the existing employment land assessment;
- Section 9 is a future demand assessment and sets out the forecast scenarios used within the study to understand the 'reasonable alternatives' for potential future growth.
- Section 10 contains a quantitative comparison of projected supply and demand for employment floorspace; and
- Section 11 presents overall conclusions and employment land policy recommendations.

3. Strategic and Policy Context

3.1 Introduction

- 3.1.1 This section outlines the planning policy and strategic context of relevance to employment land in Wigan Borough, wider region and national area.

3.2 National

National Planning Policy Framework (2023)

- 3.2.1 The National Planning Policy Framework⁷ (NPPF) consolidates the Government's economic, environmental, and social planning policies for England and provides overarching guidance on the Government's development aims. At the heart of the NPPF is a presumption in favour of sustainable development, which the Government states should be seen as a common theme running through planning and decision-taking.
- 3.2.2 In relation to the economy and employment land, the NPPF states that planning decisions should help create the conditions in which businesses can invest, expand, and adapt. They should support economic growth and productivity, taking into account both local business needs and wider opportunities for development. Decisions should also allow an area to build on its strengths, counter any weaknesses, and address any challenges of the future.
- 3.2.3 In addition, the Framework aims to identify strategic sites for local and inward investment, address potential barriers to investment, allow for new and flexible working practices, and enable a rapid response to changes in economic circumstances.

Planning Practice Guidance (2019)

- 3.2.4 Planning Practice Guidance (PPG)⁸ includes guidance on housing and economic needs assessments, and housing and economic land availability assessments.
- 3.2.5 Guidance on housing and economic needs assessments states that authorities need to prepare an evidence base to understand existing business needs, which will have to reflect local circumstances and market conditions. This includes assessing the best fit functional economic market area (FEMA), existing stock of land for employment uses within the area, recent pattern of employment land supply and loss, market demand and failure, and wider market signals relating to economic growth.
- 3.2.6 For housing and economic land availability assessments, PPG requires local planning authorities to work with other local authorities within the functional economic market area when assessing availability of land. A wide range of sites should be considered including existing sites that could be improved, intensified or changed.

The Town and Country Planning (General Permitted Development) (England) Order (2015)

- 3.2.7 Permitted development rights (PDRs) allow certain building and development works to be carried out without the need of the normal planning process. These rights were introduced to facilitate housing growth to meet targets across England. PDRs make it easier for people to extend their home, create new homes in existing buildings such as offices, shops and warehouses, or demolish vacant previously classified B1(a), B1(b), B1(c) or C3 space and rebuild as residential.
- 3.2.8 The current Use Classes were last updated on 1 September 2020. Class B now comprises B2 General Industrial and B8 Storage and Distribution, while previously classified B1(a), B1(b) and B1(c) uses are now as follows:
- E(g)(i): Offices to carry out any operational or administrative functions;

⁷ Department for Levelling Up, Housing and Communities, (2023); National Planning Policy Framework

⁸ Ministry of Housing, Communities and Local Government (2019). Planning Practice Guidance

- E(g)(ii): Research and development of products or processes; and
- E(g)(iii): Industrial processes.

3.2.9 The Order was amended in 2020 to consider PDRs for demolition and rebuilding as residential. A new use class for buildings was introduced, dealing with demolition of buildings and construction of new dwellinghouses in their place. The PDR states that the building to be demolished must have been built before 1 January 1990, be vacant, redundant and free-standing and fall within certain use classes. The building must also have been vacant for at least six months prior to the date of the application for prior approval.

3.2.10 An open consultation by DLUHC into potential changes to various permitted development rights was initiated in February 2024⁹. With regard to employment floorspace/land, potentially applicable proposed changes include:

- Review of permitted development rights for building upwards e.g. upon commercial buildings to create new homes;
- Review of permitted development rights for demolition and rebuild of detached buildings e.g. those in use as offices, research and development and industrial processes, with a view to whether number of buildings within scope by virtue of age should be increased (by extending right to redevelop newer buildings, whilst restricting right to redevelop older buildings); and
- Potential changes to permitted development rights for extension or alteration of Use Class E buildings, including office, research and development, industrial premises such that footprints can be increased by a greater magnitude.

3.3 Pan-regional

The Northern Powerhouse Independent Economic Review (2016)

3.3.1 This review¹⁰ sought to characterise the economic position of northern England and the drivers underpinning its performance. It discusses the scale, nature, and causes of the North's 'performance gap', distinctive sectoral strengths and capabilities, and future growth prospects for the North. Evidence shows that productivity and employment account for the largest share of this performance gap. It has remained broadly constant and gradually widened from the beginning of the 2008 recession.

3.3.2 It also identified four prime capabilities in which the North competes globally: advanced manufacturing, energy, health innovation, and digital. These are facilitated by three critical enablers to driving further growth: financial and professional services, logistics, and investment in education. As noted in the Wigan Employment and Skills Strategy²⁰, high value sectors such as the ones identified here are expected to grow in terms of output and employment in Wigan Borough in the future. However, the borough is currently more concentrated with 'foundational economy' sectors and so identifying locations for future employment space could facilitate expansion in these industries and drive growth.

3.4 Sub-regional

Greater Manchester Strategy (2021)

3.4.1 The Greater Manchester Strategy¹¹ aims to make Greater Manchester a place where everyone has good quality of life in a greener, fairer, more prosperous city region. It sets out a route up to 2031 for how this vision can be realised in an inclusive, innovative, and forward-thinking way. The Strategy is broken down into three main themes:

⁹ Department for Levelling Up, Housing and Communities, (2024); Changes to various permitted development rights: consultation.

¹⁰ SQW (2016). The Northern Powerhouse Independent Economic Review. Available at: https://www.sqw.co.uk/application/files/5316/2037/9289/16987_-_TfN_-_NPH_IER_-_Executive_Summary_-_Final_24_June_2016.pdf

¹¹ Greater Manchester Combined Authority (2021). Greater Manchester Strategy. Available at: <https://aboutgreatermanchester.com/media/jlslqby5/greater-manchester-strategy-our-plan.pdf>

- A Greener Greater Manchester: recognising that climate change is the single biggest threat to places everywhere and that the city-region has set a target of being carbon-neutral by 2038;
 - A Fairer Greater Manchester: identifying inequalities that have deepened since the COVID-19 pandemic regarding jobs, transport, and health and housing; and
 - A Prosperous Greater Manchester: delivery of a new vision for economic growth which is equitable and socially responsible to create opportunities and prosperity for all.
- 3.4.2 This EMELA aligns with the vision for a Prosperous Greater Manchester, creating economic opportunities to ensure all citizens benefit from the economic development of the city-region.
- 3.4.3 In addition, the Strategy presents the Greater Manchester Growth Locations in which Wigan Borough falls into the Wigan-Bolton Growth Corridor. The purpose of these locations is to identify areas of opportunity for the whole city-region to bring forward development and drive transformational change. For example, identifying locations for the delivery of employment land in the Wigan-Bolton Growth Corridor could improve the perception of both boroughs as places to live, work and invest.
- 3.4.4 Moreover, the Greater Manchester Strategy highlights the importance of the foundational economy and frontier sectors, including clean growth, health innovation, advanced materials and manufacturing and digital, creative and media. These sectors have the potential to address some of society's biggest challenges including achieving net zero carbon emissions and addressing the challenges of an ageing population, as well as to drive investment and productivity, and create future jobs, both locally and across the UK.

Places for Everyone Plan (2024)

- 3.4.5 The Places for Everyone Plan¹² is a joint development plan which provides a strategic development framework for nine Greater Manchester boroughs for the plan period 2022-39¹³. It has been developed in conjunction with Transport for Greater Manchester's (TfGM) Transport Strategy 2040 and first Five-Year Transport Delivery Plan, to incorporate infrastructure and transport investment needs.
- 3.4.6 The Places for Everyone Plan has the following Strategic Objectives, through to 2039, that hold relevance for this EMELA:
- Objective 1: Meet our housing need.
 - Objective 3: Playing our part in ensuring a thriving and productive economy in all parts of Greater Manchester.
 - Objective 5: Reduce inequalities and improve prosperity.
 - Objective 9: Ensure access to physical and social infrastructure.
- 3.4.7 In regard to policies, Policy JP-Strat 6 focuses on boosting the competitiveness of 'Northern Areas' including Wigan Borough, highlighting the need to prioritise the re-use of brownfield land, and increase the mix, type, quality and range of residential offer.
- 3.4.8 Lying within the area and policy framework covered by JP-Strat 6, the Wigan – Bolton Growth Corridor (Policy JP-Strat 8) will deliver a regionally-significant area of economic and residential development. This growth corridor is focused on improved transport links. These include new roads and a Wigan to Bolton Quality Bus corridor and, the more intense use of the Wigan – Atherton – Manchester and the Wigan – Bolton – Manchester rail lines. There are a number of sites already identified along this corridor, including some major brownfield sites such as those to the north of Leigh, south of Hindley and at Westwood Park, to support commercial and residential development. However, in order to maximise the contribution of this corridor to boosting the competitiveness of the northern areas, support the economic prospects of Wigan and Bolton, and maximise the benefits of new transport infrastructure, there is also provision made for selective release of land from the Green Belt for employment and housing development.

¹² Greater Manchester Combined Authority (2024). Places for Everyone. Available at: <https://www.greatermanchester-ca.gov.uk/media/4838/places-for-everyone.pdf>

¹³ The plan period of 2022-39 is based on proposed modifications to the plan following examination.

Places for Everyone Employment Topic Paper (2021)

- 3.4.9 As part of the Places for Everyone Plan, the Employment Topic Paper¹⁴ focuses on employment and specifically the supply and demand for office and industry/warehousing land across the plan period.
- 3.4.10 Key findings of the supply and demand assessment found, across Greater Manchester:
- A shortfall in industry and warehousing floorspace. Allocations in Wigan Borough were suggested including M6 Junction 25, Pocket Nook, and West of Gibfield.
 - An oversupply of office floorspace. This is mostly within the City of Manchester, as Wigan Borough has a much smaller supply.

Greater Manchester Local Industrial Strategy (2019)

- 3.4.11 The Greater Manchester Local Industrial Strategy¹⁵ outlines a set of long-term policy priorities to help guide industrial development and provides a plan for job creation and economic growth in Greater Manchester. It builds on 'Our People, Our Place' – the Greater Manchester Strategy.
- 3.4.12 A strategic priority of the Strategy is to strengthen economic areas across the city-region based on their unique opportunities and challenges, building on the diversity of its places. It refers to the eight main town centres (including Wigan) which are to be supported to provide a stronger focus for local economic activity by exploiting advantages such as, particularly for Wigan, the direct mainline rail links to London.

3.5 Local

Wigan Replacement Unitary Development Plan – Remaining Policies (2006)

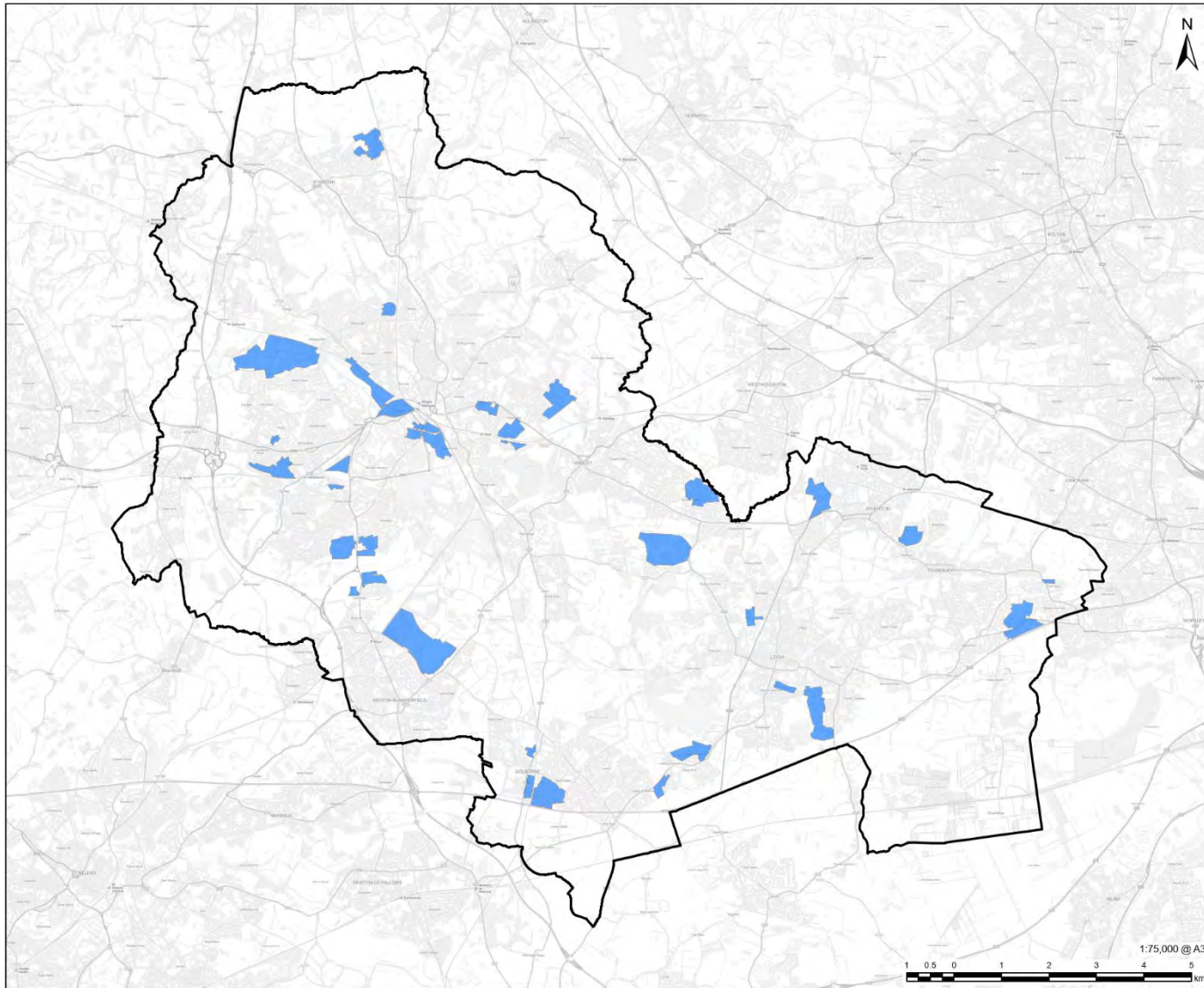
- 3.5.1 The Wigan Unitary Development Plan¹⁶ was adopted by the council in April 2006. It includes written policies and a proposal map showing land use allocations and designations. Many policies have now been replaced by policies in the Local Plan Core Strategy. Some remain and are contained within this document.
- 3.5.2 Policy EM1A identifies 35 Primary Employment Areas, which are designated on the Local Plan Policies Map as shown in Figure 2. These include business parks and industrial estates. They have particular advantages for continuing employment use including: a mass of land capable of meeting a variety of business needs, emphasis on redevelopment of brownfield land, balanced geographical spread, good accessibility for workers and goods.

¹⁴ Greater Manchester Combined Authority (2021). Places for Everyone Employment Topic Paper. Available at: <https://www.greatermanchester-ca.gov.uk/GMCAFiles/PFE/Supporting%20documents/05%20Places%20for%20Jobs/05.01.04%20Employment%20Topic%20Paper.pdf>

¹⁵ HM Government (2019). Greater Manchester Local Industrial Strategy. Available at: <https://www.greatermanchester-ca.gov.uk/media/2132/gm-local-industrial-strategy-web.pdf>

¹⁶ Wigan Council (2006). Wigan Unitary Development Plan – Remaining Policies. Available at: <https://www.wigan.gov.uk/Council/Strategies-Plans-and-Policies/Planning/Local-plan/ReplacementWiganUDP.aspx>

Figure 2 Primary Employment Areas in Wigan Borough (Policy EM1A)



- 3.5.3 UDP Policy EM1B covers other (undesigned) employment areas and sites. In all, 22 other undesigned employment areas and sites have been identified across the borough. The emphasis within both policies is to maintain employment land and premises for employment uses wherever possible. However, this has proved challenging in many instances over the last 15 years, with many sites having been lost, predominantly to housing, usually entirely appropriately due to:
- there having been no effective market demand for outdated and expensive to maintain premises; and
 - redevelopment for employment uses having been unviable or unworkable as an investment proposition due to the yields required.
- 3.5.4 However, it should be noted that this is an aged document, and that national policy now reflects the need to ensure a balanced supply of land for employment and housing.

Wigan Local Plan Core Strategy (2013)

- 3.5.5 The Wigan Local Plan Core Strategy¹⁷ is the strategic local plan for the borough. It sets out the spatial vision through to 2026 and a range of strategic objectives and policies.
- 3.5.6 Policy CP 5 notes the need to create sustainable economic growth across the borough to boost economic performance and profile; and provide a wider range of job opportunities. It identifies the need to bring forward a range of employment sites of the right quality in terms of location, accommodation provision and supporting infrastructure, to attract, maintain and grow businesses, especially within the east-west core of the borough. Policy CP 5 will be replaced by Policy JP-J1 and JP-J2 upon the adoption of the Places for Everyone Plan and the core principles of CP 5 are now captured within these.
- 3.5.7 Wigan Council is preparing a new Wigan Borough Local Plan, which will replace remaining policies in the Wigan Local Plan Core Strategy (2013) and the remaining policies in the Wigan Replacement Unitary Development Plan (2006). It is envisaged that the Local Plan will allocate specific sites for development to facilitate sustainable development, deliver associated infrastructure and address development needs over the next 15 years. The Local Plan will be consistent with, and sit alongside, the Places for Everyone Plan.

Wigan Employment Land Review Update (2015)

- 3.5.8 The latest complete evidence base on employment land and premises in Wigan Borough is an Employment Land Review from 2008 that was prepared to inform the Local Plan Core Strategy. An update was made to the Review in 2015 and is summarised below¹⁸.
- 3.5.9 The update finds that the quality of existing employment offer is mixed. The borough has good employment sites that are well occupied and where investment and improvement has taken place such as Stone Cross Park and Moss Industrial Estate. However, there are several older unplanned employment sites which are of poor quality and displaying signs of obsolescence.
- 3.5.10 Analysis of employment supply within this update finds a total of 160 hectares of suitable and available employment land. These sites are within existing employment areas or within the broad locations for development identified within the Core Strategy. The update notes that there is a shortfall of 35 hectares against the Core Strategy requirement for 200 hectares, taking into consideration that 4.35 hectares of employment land have been provided since 2011.
- 3.5.11 It is important to note that evidence gathered in this update identifies a requirement for employment sites with particular characteristics that are not currently available within the borough. In particular, there is a requirement for high profile larger sites with good transport connections to the motorway network that are attractive to the market. It identifies that these areas could be suitable for logistics, manufacturing and/or office uses.

¹⁷ Wigan Council (2013). Wigan Local Plan Core Strategy.

¹⁸ Wigan Council (2015). Wigan Borough Draft Employment Land Review. Available at: <https://www.wigan.gov.uk/Council/Strategies-Plans-and-Policies/Planning/Local-plan/Background/Key-Local-Studies/WiganEmploymentLandReview.aspx>

Wigan Employment Land Position Statement (2020)

- 3.5.12 This Statement¹⁹ suggests that it is increasingly evident that most of the borough's employment land supply is either too small, too long term or in the wrong location to compete for major investment opportunities for business and jobs. The borough does not take advantage of its strategic assets, including the M6 and M61 Motorways and the A580 East Lancashire Road, to secure a greater share of the modern employment market. It is the only borough in Greater Manchester that has direct access to the M6 and M58, which the Greater Manchester Spatial Framework – now superseded by the Places for Everyone Plan – recognises as a significant opportunity for manufacturing and logistics development (Use Classes B2 & B8).
- 3.5.13 In 2020, it was estimated that Wigan Borough had 131.44 hectares of available employment land. Around two fifths of this available employment land consists of small vacant plots below 5 hectares within designated employment areas, with one third on very small sites of less than one hectare. These small sites are suitable for small, locally based and low cost or low amenity businesses, and are therefore unattractive to, and unsuitable for, larger Class B2 and B8 uses due to their size, access and location.
- 3.5.14 Of this 131.44 hectares, there is considerable uncertainty about the availability of around half of this supply within the Core Strategy plan period to 2026, and beyond. Uncertainty has arisen due to factors such as the need for transport infrastructure improvements and ground remediation, and the fact that some sites within this supply are the subject of residential planning applications.
- 3.5.15 The Council did produce an Employment Land Prospectus in 2021 to promote the portfolio of sites, but there has been relatively little progress on them since the prospectus was published.

Wigan Employment and Skills Strategy (2019)

- 3.5.16 Wigan's Employment and Skills Strategy²⁰ sets out plans to create a strong and productive workforce in the borough. Deindustrialisation has impacted Wigan and main employment sectors are now retail, health and social care, and public services. Typically, these sectors provide low-skilled, low-paid jobs and suffer low levels of productivity.
- 3.5.17 The Strategy states that in the future, high value sectors such as digital, construction, engineering, and logistics are expected to grow in terms of output and employment in the borough. An objective of the Strategy is to increase the number of employment opportunities within these high growth sectors and so sufficient employment land is required for this.

Wigan's Economic Vision – Wigan's Economic Strategy (2019)

- 3.5.18 Wigan's economic vision²¹ is a high-level plan setting out the growth priorities until 2030. The vision has been shaped with the business community and capitalises on our strengths and opportunities.
- 3.5.19 It is hoped that in 2030, Wigan Borough will have capitalised on its close proximity to Manchester, Liverpool, and Birmingham. In addition, it is expected that Wigan Borough will be known for attracting big brands and new start-ups, but also for realising the potential of existing businesses, particularly those that have become known as the 'foundational economy' such as retail and healthcare.

3.6 Summary

- 3.6.1 At a national level, guidance suggests that development should allow an area to build on its strengths, counter any weaknesses, and address any challenges of the future, which will form the basis of this assessment. It is recommended that a FEMA is established to understand business needs and market conditions in an area. At a regional level, policies such as the Greater Manchester Strategy and the Places for Everyone Plan put emphasis on increasing prosperity across the sub-region, encouraging economic opportunities to be established which should benefit all. The economic position of northern

¹⁹ Wigan Council (2020). Wigan Borough Employment Land Position Statement. Available at: <https://www.wigan.gov.uk/Council/Strategies-Plans-and-Policies/Planning/Local-plan/Background/Employment-Land-Position-Statement.aspx>

²⁰ Wigan Council (2019). Employment and Skills Strategy 2020-2030. Available at: <https://www.wigan.gov.uk/Docs/PDF/Resident/Jobs-Careers/Employability-and-skills-strategy.pdf>

²¹ Wigan Council (2019). Wigan's Economic Vision – Wigan's Economic Strategy. Available at: <https://www.wigan.gov.uk/Docs/PDF/Business/Economic-vision/Wigan-Economic-Vision.pdf>

England is also discussed, highlighting the performance gap and emphasising the need to close this by capitalising on its main strengths: advanced manufacturing, energy, health innovation, and digital. The Strategy also recognises the Wigan-Bolton corridor as an opportunity for growth, holding substantial importance in enhancing competitiveness and employment through its transport connections, particularly for logistics and industrial sectors. At a more local level, it is evident that there is an identified need to bring forward a range of employment sites to facilitate this growth. Historically, some employment sites have been lost due to lack of market demand and viability issues, indicating the need to ensure that new sites are well planned within the economic context of Wigan Borough to be successful. Connectivity and transport are key topics across local policies, with the borough's proximity to the motorway network identified as a strength to support future employment growth.

4. Functional Economic Market Area

4.1 Introduction

- 4.1.1 As noted above, the PPG requires local planning authorities (LPAs) to assess development needs working with other LPAs in the relevant functional economic market area in line with the duty to cooperate. It adds that local communities, partner organisations, Local Enterprise Partnerships, businesses, business representative organisations and Higher Education Institutions, among others, should be involved in the preparation of the evidence base in relation to development needs.
- 4.1.2 PPG states that the need for economic uses should be assessed in relation to the functional economic area (FEMA) whilst identifying and recognising smaller sub-markets with specific features and 'market segments'. It states that it is possible to define FEMA's by exploring the spatial economic profile; travel to work areas; commercial property market areas; housing market areas; transport networks; and economic and governance partnership areas.
- 4.1.3 When it comes to statistical data the PPG suggests a single source for defining FEMA's: the Office for National Statistics (ONS) Travel-to-Work Areas (TTWAs) which are based on commuting data only, with Wigan's covering Lower Super Output Areas (LSOAs) across Wigan and Warrington. However, the TTWAs ignore administrative boundaries, and are therefore of limited value for Duty to Cooperate discussions. The methodology for defining the FEMA is consequently based on commuting data, administrative boundaries and housing and commercial property markets.
- 4.1.4 The objective was therefore to identify an area that records the highest self-containment in terms of commuting flows, and which also best fits the administrative boundaries, housing, and commercial property markets.

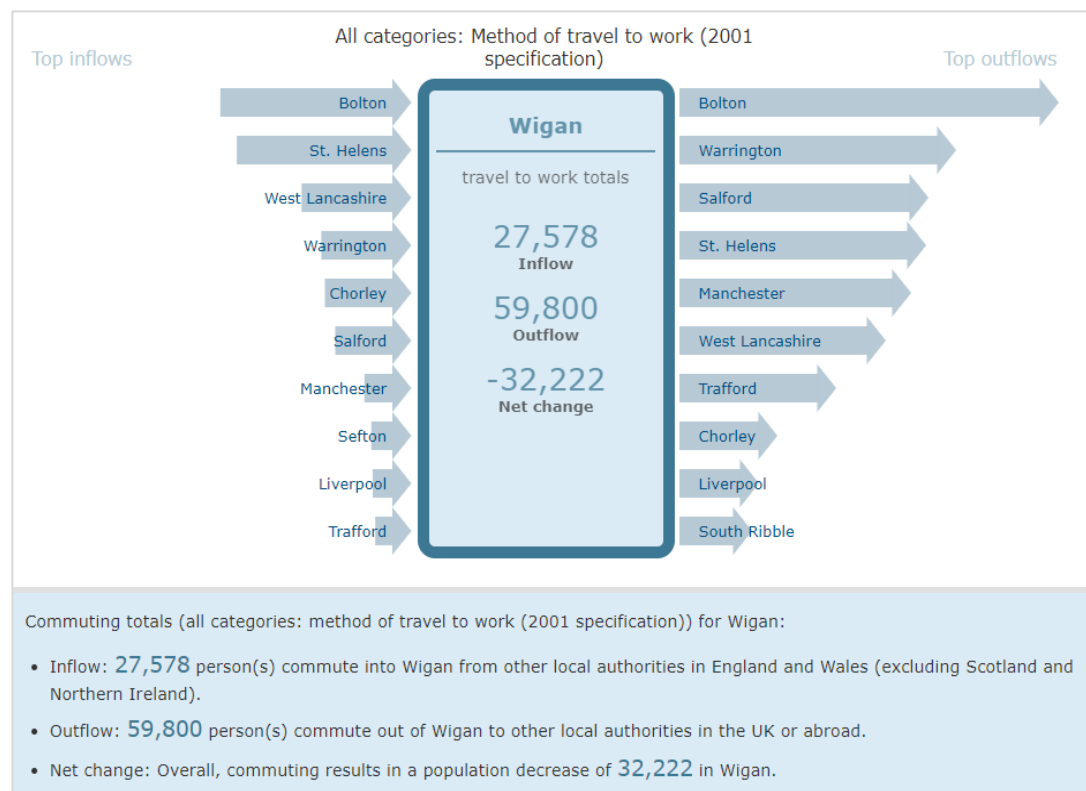
4.2 Travel to Work Area

- 4.2.1 The PPG does not prescribe a threshold of self-containment (people who live and work in the same area) to help define the FEMA. AECOM has adopted the ONS's definition of TTWAs that states that: *"The current criterion for defining the TTWAs is that generally at least 75% of an area's resident workforce work in the area and at least 75% of the people who work in the area also live in the area... however, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted"*. The lower 66.7% threshold for self-containment for origin and destination commuting is therefore appropriate in the case of Wigan Borough, which has a working population in excess of 25,000.
- 4.2.2 Further, the ONS publishes Origin-Destination data (also known as flow data) which includes the travel-to-work patterns of individuals based on data from the 2011 Census²².
- 4.2.3 Figure 3 provides a summary of total and top inflows and outflows for Wigan Borough. The data indicates that 27,578 people commute into Wigan Borough from a different local authority area for work, whilst 59,800 commute from Wigan Borough to another local authority area for work, generating an overall net outflow of 32,222 people²³. The main flow of workers into the borough is from Bolton and St. Helens, and the main flow of workers out of the borough is to Bolton and Warrington.

²² While the ONS 2021 Census Origin-Destination data has been released, Census 2021 took place during the coronavirus (COVID-19) pandemic, a period of unparalleled and rapid change; the national lockdown, associated guidance and furlough measures will have affected the origin-destination data. Therefore, using these data for planning and policy purposes is cautioned, with Census likely to be a truer reflection of travel to work patterns, albeit the frequency of journeys may have reduced following the pandemic.

²³ By way of contrast, the Census 2021 data indicates that 20,492 people commute into Wigan from a different local authority area for work, whilst 45,628 commute from Wigan Borough to another local authority area for work, generating an overall net outflow of 25,136.

Figure 3 Top Inflows and Outflows for Wigan Borough



Source: Office for National Statistics (2011). Census 2011: Census WU03EW - Location of usual residence and place of work by method of travel to work (MSOA level).

4.3 Inflow Self-Containment

4.3.1 Detailed Origin-Destination data indicates that Wigan Borough supports 95,852 jobs, of which 68,238 are filled by residents of the borough. This represents a share of 71.2%, which is above the 66.7% threshold of ONS's self-containment definition of travel to work areas. Therefore, Wigan would be considered to be self-contained as a travel to work area in regard to inflows. Inflows are presented in Table 2 for the top 10 origins.

Table 2 Wigan Borough Inflows

Usual Residence	Working in Wigan	Self-Containment
Wigan	68,238	71.2%
Bolton	4,476	75.9%
St. Helens	4,073	80.1%
West Lancashire	2,483	82.7%
Warrington	2,000	84.8%
Chorley	1,912	86.8%
Salford	1,658	88.5%
Manchester	942	89.5%
Sefton	772	90.3%

Usual Residence	Working in Wigan	Self-Containment
Liverpool	739	91.1%

Source: Office for National Statistics, (2011); Census 2011: Origin-Destination data

4.4 Outflow Self-Containment

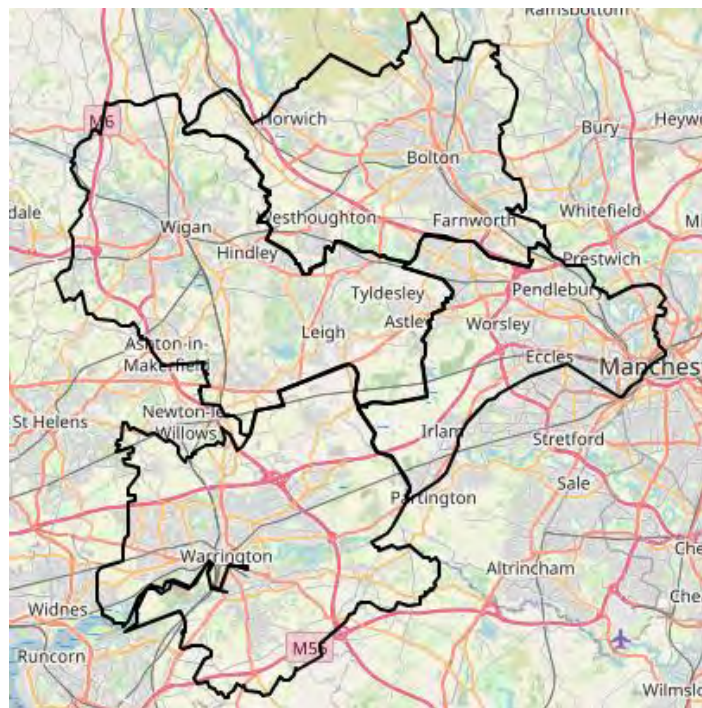
- 4.4.1 Detailed Origin-Destination data indicates that Wigan Borough has a population (residents aged 16 and over in employment) of 127,732 persons, of which 68,238 work in Wigan. This represents a share of 53.4% which is below the 66.7% adopted as the ONS threshold definition of TTWAs. Therefore, based on this definition, the borough could not be considered to be self-contained or as a travel to work area in regard to outflows.
- 4.4.2 Outflow data is presented in Table 3 for the top ten destinations. This data suggests from an outflow perspective, that there is a TTWA (above the 66.7% ONS self-containment definition of TTWAs) comprising Wigan, Bolton, Warrington, and Salford.

Table 3 Wigan Borough Outflows

Usual Place of Work	Residing in Wigan	Self-Containment
Wigan	68,238	53.4%
Bolton	9,110	60.6%
Warrington	6,539	65.7%
Salford	5,845	70.3%
St. Helens	5,787	74.8%
Manchester	5,415	79.0%
West Lancashire	4,763	82.7%
Trafford	3,532	85.5%
Chorley	2,048	87.1%
Liverpool	1,584	88.4%

Source: Office for National Statistics, (2011); Census 2011: Origin-Destination data

Figure 4 Wigan Borough Outflow Self-Containment Area



Source: Nomis (2023).

4.5 Transport Networks

- 4.5.1 Like the commute to work assessment, an analysis of transport network is a useful indicator of the potential size and shape of the FEMA for Wigan Borough. The average commute time can be applied to understand the catchment area (inflow commuting of workforce), as well as the extent of the area of potential employment for local residents (outflow commuting of workforce). This defines the employment market area.
- 4.5.2 The average commute time in the UK is 59 minutes per day²⁴, or 63 minutes by National Rail²⁵, or the equivalent of circa 30 minutes' journey each way.
- 4.5.3 On this basis, the employment market area is defined as the geographical area reachable from Wigan Borough (from the outer boundaries of the borough for travel by road, and from a train station within the borough by rail).

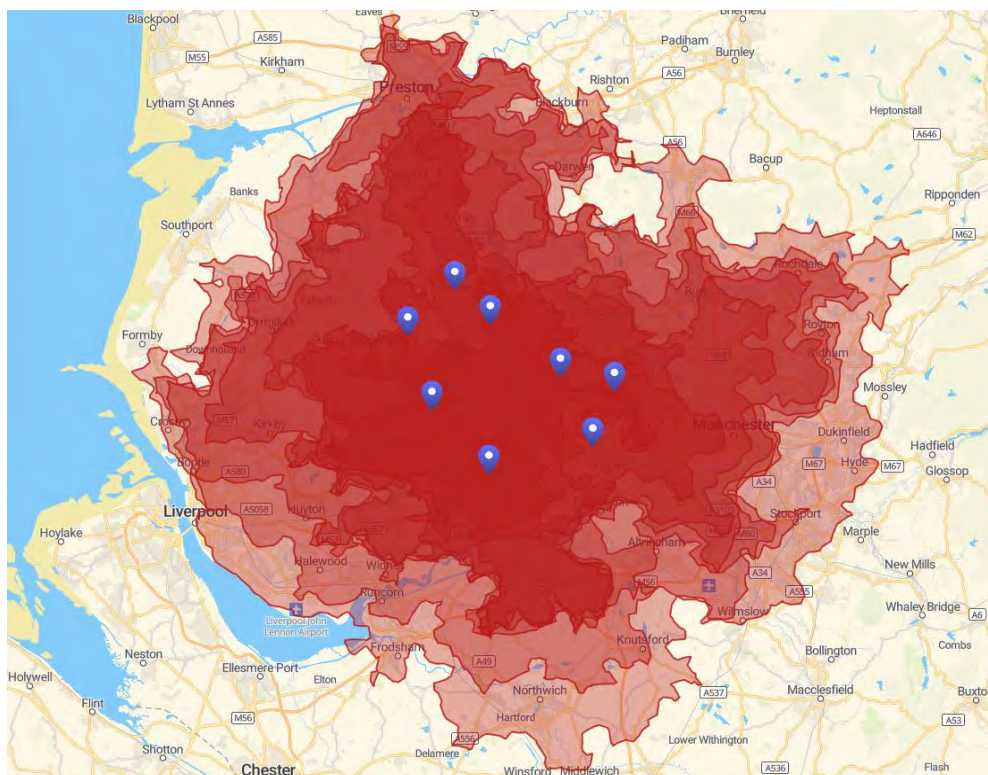
Road

- 4.5.4 Wigan Borough is serviced by several strategic roads which provide key links to major urban centres outside of the borough including Manchester and Liverpool. These roads include the M6, M58, M61, and A580. It is also serviced by a range of secondary roads which mainly provide links to neighbouring local authorities.
- 4.5.5 Data shows that respecting speed regulations, there are 25 local authorities reachable by car within a 30-minute drive from Wigan Borough. Figure 5 illustrates the 30-minute catchment area. It shows the different areas (red highlighted) reachable from different starting points (blue pins) within the borough. The darker shades of red indicate the areas reachable from multiple parts of the borough, whereas lighter shades show areas that are only reachable by some parts of the borough.

²⁴ Safe Workers (2023). Long Commutes to Work What are UK Averages & How Far is Too Far? Available at: <https://www.safeworkers.co.uk/health-wellbeing/effects-of-long-commutes-to-work/#:~:text=The%20average%20commute%20in%20the,and%20from%20work%20each%20day.>

²⁵ Statista (2023). Average commuting time in Great Britain in October to December 2020, by mode of transportation. Available at: <https://www.statista.com/statistics/300712/average-time-taken-to-travel-to-work-in-the-united-kingdom/>

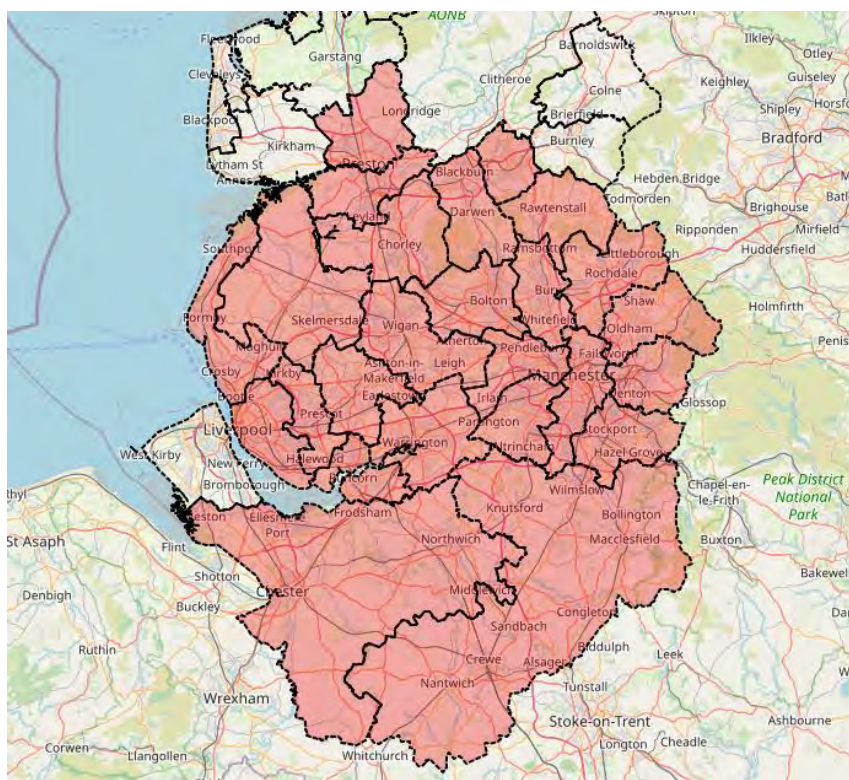
Figure 5 Wigan Borough 30-Minute Drive Catchment Area



Source: AECOM

4.5.6 The 25 local authorities are located within the North West region: Blackburn with Darwen; Bolton; Bury; Cheshire East; Cheshire West and Chester; Chorley; Halton; Hyndburn; Knowsley; Liverpool; Manchester; Oldham; Preston; Rochdale; Rossendale; Salford; Sefton; South Ribble; St. Helens; Stockport; Tameside; Trafford; Warrington; West Lancashire; and Wigan.

Figure 6 Wigan Borough 30-Minute Drive Catchment Area by Local Authority



Source: AECOM

Rail

- 4.5.7 There are 10 train stations within Wigan Borough: Atherton; Bryn; Gathurst; Hag Fold; Hindley; Ince; Orrell; Pemberton; Wigan North Western; and Wigan Wallgate. Table 4 provides a list of stations which can be reached within 30 minutes (by rail) from one of these stations, not including those listed.

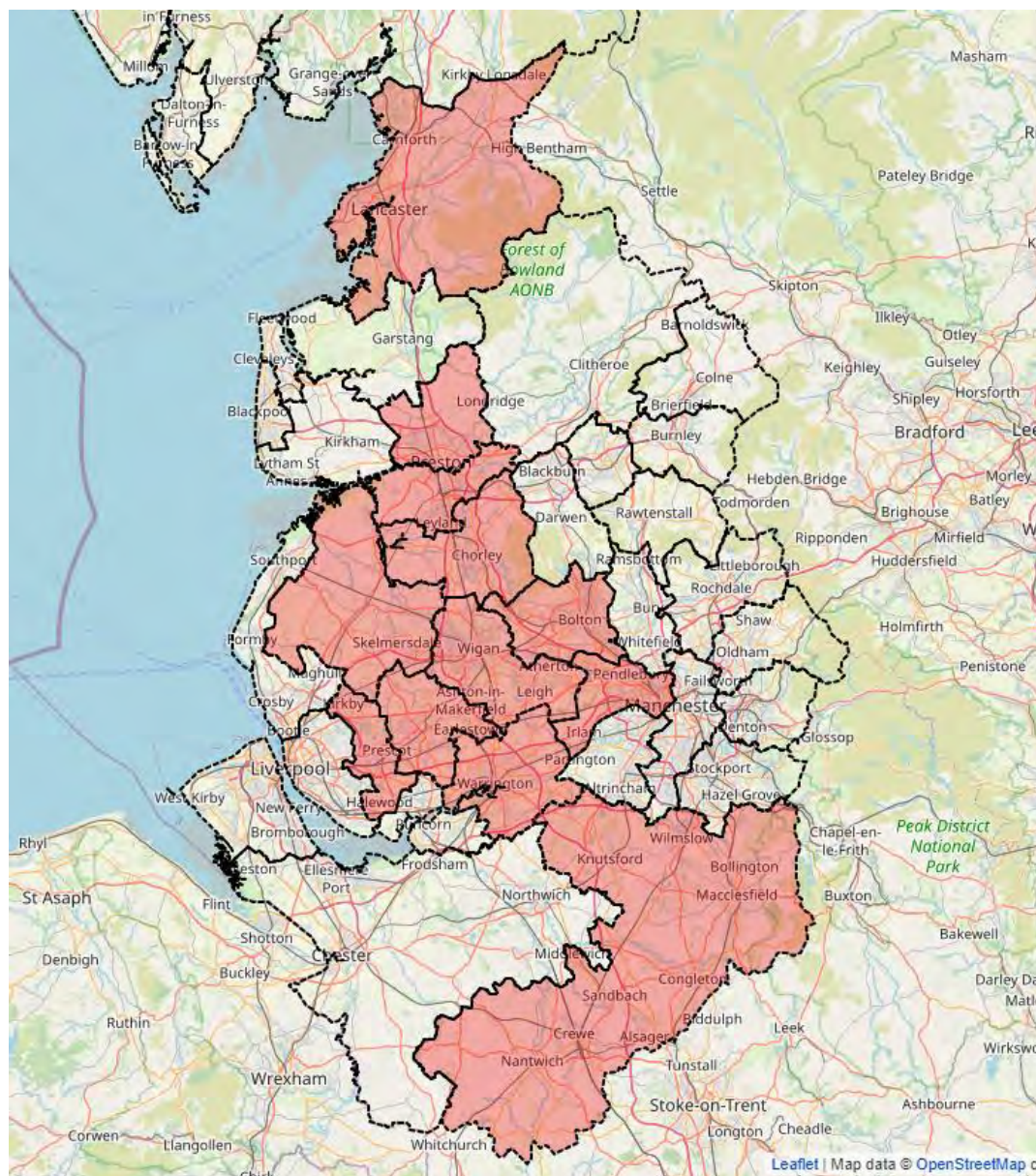
Table 4 Railway Stations Accessible Within 30-Minute Train Journey from Stations within Wigan Borough

Station	Local authority
Appley Bridge	West Lancashire
Daisy Hill	Bolton
Crewe	Cheshire East
Euxton Balshaw Lane	Chorley
Huyton	Knowsley
Lancaster	Lancaster
Leyland	South Ribble
Parbold	West Lancashire
Preston	Preston
Rainford	St Helens
Salford Crescent	Salford
St Helens Central	St Helens
Swinton	Salford
Up Holland	West Lancashire
Walkden	Salford
Warrington Bank Quay	Warrington
Westhoughton	Bolton

Source: TravelTime and Trainline

- 4.5.8 Figure 7 below illustrates the local authorities that are reachable from Wigan Borough by rail within 30 minutes or less.

Figure 7 Wigan Borough 30-Minute Train Journey Catchment Area by Local Authority



Source: AECOM

4.6 Housing Market Area

- 4.6.1 A draft Wigan Strategic Housing Market Assessment was consulted on in 2015 however did not progress to a final version. This was due to work commencing on a Greater Manchester Strategic Housing Market Assessment²⁶, which was published to inform the Greater Manchester Spatial Framework, now the Places for Everyone Plan. The Assessment identifies Wigan Borough as part of the Greater Manchester housing market area (along with the other nine GM authorities) and assesses housing needs to 2035.

4.7 Commercial Property Market Area

- 4.7.1 The FEMA is also influenced by the commercial property market area in which Wigan sits. Commercial property market areas are geographic boundaries that serve to define core areas that are competitive

²⁶ Greater Manchester Combined Authority (2020). Greater Manchester Strategic Housing Market Assessment Update. Available at: <https://www.greatermanchester-ca.gov.uk/what-we-do/planning-and-housing/places-for-everyone/archive/previous-consultation/greater-manchester-spatial-framework-2020-archive/supporting-documents/>

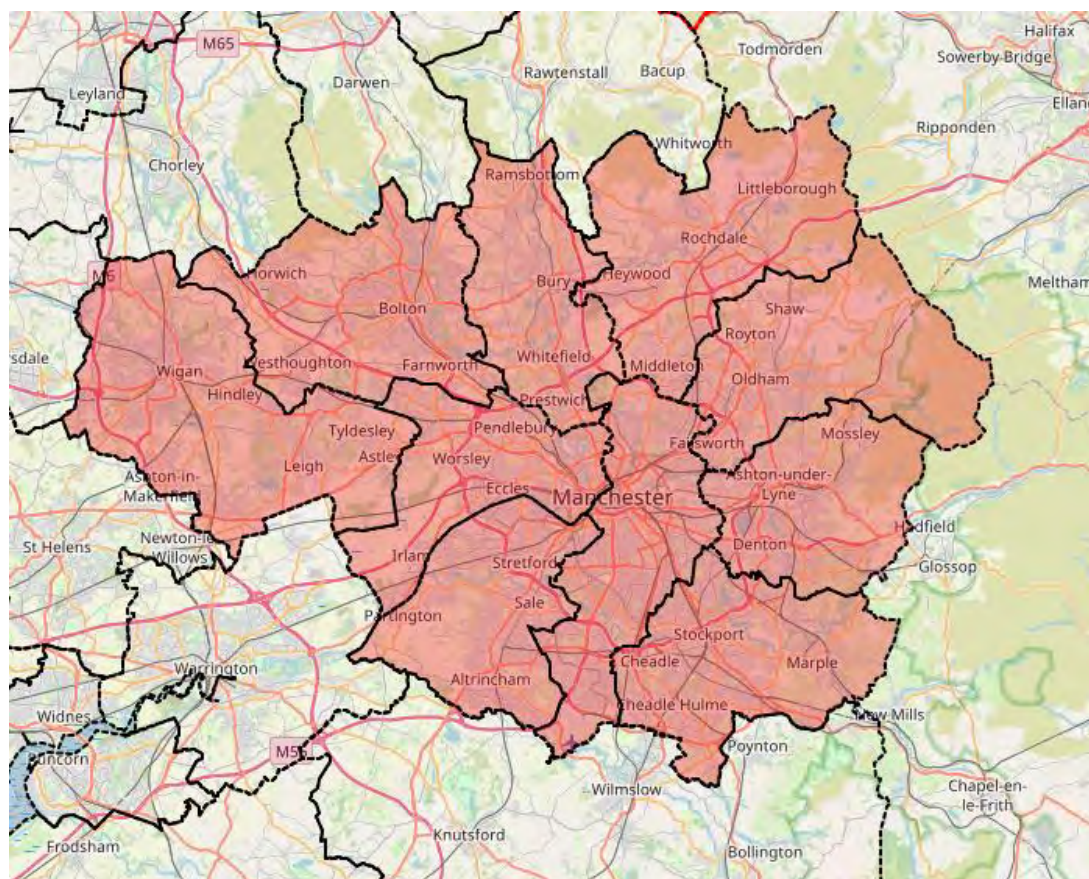
with each other. Markets are defined by buildings presenting similar characteristics and are formed of non-overlapping areas (i.e., a place cannot be part of two property market areas at the same time).

- 4.7.2 For the purposes of this EMELA, it is relevant to look at both the office and industrial property markets. CoStar, the most comprehensive database of real estate data throughout the UK, is a useful source of information and provides pre-defined office and industrial property market areas for the entire UK. CoStar defined markets have therefore been assumed as part of the analysis.
- 4.7.3 Both the industrial and office markets are defined as 'Manchester' which encompasses the local authority areas of Greater Manchester (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Trafford, Tameside, and Wigan). These are referred to as 'sub-markets'.

4.8 Economic Governance and Partnerships Area

- 4.8.1 Wigan falls within the Greater Manchester Business Board (formerly the Greater Manchester Local Enterprise Partnership). The Board captures all ten Greater Manchester local authorities and works in partnership with Greater Manchester Combined Authority. The Board sits at the heart of Greater Manchester's governance arrangements, aiding business leaders to set the strategic course, determine local priorities and drive growth and job creation within the city region.

Figure 8 Greater Manchester Business Board Area



Source: AECOM

4.9 Summary

- 4.9.1 To summarise, Wigan Borough can be considered relatively self-contained economically, with some important connections either from a connectivity, market characteristics, and economic governance perspective.
- 4.9.2 Based on the assessment undertaken in this section, and as summarised in Table 5, it can be concluded that Wigan Borough is particularly connected to two other local authorities: Bolton and Salford. This is based on outflow self-containment, the road and rail network, housing and property

market areas, and economic governance areas. Therefore, these three local authorities form Wigan Borough's FEMA.

- 4.9.3 However, it is noted that the borough does have strong relationships with neighbouring local authorities that fall outside of this definition, such as Warrington, St Helens, West Lancashire and Chorley, and these areas are considered within the property market analysis (Section 6) in light of this.

Table 5 Summary of Wigan Borough FEMA Analysis

Local authority

	Inflow self-containment	Outflow self-containment	Road network	Rail network	Housing market area	Property market area	GM Business Board (LEP)
Wigan	X	X	X	X	X	X	X
Bolton		X	X	X	X	X	X
Salford		X	X	X	X	X	X
Bury			X		X	X	X
Manchester			X		X	X	X
Oldham			X		X	X	X
Rochdale			X		X	X	X
Stockport			X		X	X	X
Tameside			X		X	X	X
Trafford			X		X	X	X
Warrington		X	X	X			
Cheshire East			X	X			
Chorley			X	X			
Knowsley			X	X			
Preston			X	X			
South Ribble			X	X			
St. Helens			X	X			
West Lancashire			X	X			
Blackburn with Darwen			X				
Cheshire West and Chester			X				
Halton			X				
Hyndburn			X				
Lancaster				X			
Liverpool			X				
Rossendale			X				
Sefton			X				

Source: AECOM (2023)

5. Wigan Borough's Economic Performance

5.1 Introduction

5.1.1 This section profiles Wigan Borough's economic strengths and weaknesses that may impact upon employment land and premises requirements. Key indicators provided include:

- Population by age;
- Economic activity;
- Employment by industry sector;
- Business stock, size and demography (start-ups and closures); and
- Qualifications, earnings and GVA.

5.1.2 To provide a comparative assessment, Wigan Borough is benchmarked against the FEMA, Greater Manchester and England.

5.2 Population

5.2.1 The future economic needs of Wigan Borough will be driven in part by trends in the size of the resident population. ONS Census data^{27 28} shows that the population of Wigan increased by 3.6% between 2011 and 2021 from 318,000 to 329,000. Compared to the other geographies, the population of Wigan grew at a slower pace than the FEMA (8.0%), Greater Manchester (6.9%), and England (6.6%) over the same period. Over the past decade, the proportion of the working age population in the borough decreased from 64.9% in 2011 to 62.3% in 2021. This mirrors the trend across all geographies.

5.2.2 The ONS also publishes population projection data²⁹ which can illustrate what an area's population structure may look like in the future. In 2041, it is expected that Wigan will have experienced a net increase in the overall population of 5.2%. However, when broken down by age group, it is the 65 and over category which will likely drive this increase. In contrast, both the under 16 and the working age group populations are expected to decline by 2041, albeit the latter only marginally. This does however present a distinction, in that Wigan is expected to experience a net decrease in the working age population (-0.1%), compared to the FEMA (3.8%), Greater Manchester (4.8%) and England (2.3%) which are all projected to experience increases. A decrease in the working age population could have implications for economic development in the borough, with the pressures of a high dependency ratio impacting local service delivery and having the potential to reduce productivity growth.

Table 6 Estimated Population Change by 2041 across the study areas

	Wigan	FEMA	Greater Manchester	England
All Ages	5.2%	7.4%	7.6%	7.7%
Aged 0 to 15	-5.7%	-1.0%	-0.8%	-3.6%
Aged 16 to 64	-0.1%	3.8%	4.8%	2.3%
Aged 65+	32.7%	30.1%	29.4%	36.9%

Source: ONS (2021). Population Projections.

²⁷ Office for National Statistics (2011). ONS Census 2011.

²⁸ Office for National Statistics (2021). ONS Census 2021.

²⁹ Office for National Statistics (2021). Population Projections.

5.3 Economic Activity

- 5.3.1 Economic activity data measures the proportion of working age residents who are active members of the labour market in an area. In 2021²⁸, the average economic activity rate in Wigan Borough was 58.8%, higher than the FEMA (58.2%), Greater Manchester (57.4%), and England (58.6%). In addition, the unemployment rate was lower in the borough than in the FEMA and Greater Manchester, and similar to the national average.
- 5.3.2 Jobs density³⁰, which is the number of jobs in an area divided by the working age resident population (aged 16 to 64), is estimated to be 0.61 in Wigan Borough, which is considerably lower than the equivalent rate across the FEMA (0.75), Greater Manchester (0.81), and England (0.86). This suggests a lower supply of jobs in the borough relative to its working age population compared to areas more widely, and reflects the analysis in Section 4 which shows that 59,800 Wigan Borough residents travel outside of the borough for work; whereas 27,578 residents from other local authorities commute into the borough for work.

5.4 Employment by Industry

- 5.4.1 Like many other towns in the north of England, Wigan has a proud industrial heritage, with its canals and railways providing connections to Liverpool and Manchester which allowed the town to expand and grow economically. To this day the borough retains a higher proportion of employment in manufacturing, at 9.2% of all jobs compared with the national average of 7.7%, linked to its strong manufacturing engineering base and specialisms such as food manufacturing. However, the borough's economy is increasingly becoming characterised by the service sector. In 2021³¹, the largest employment sector in the borough was health³², employing 15.6% of workers, representing a greater share than in the FEMA (13.8%), Greater Manchester (13.0%) and England (13.1%). This reflects points made within various local guidance that the 'foundational economy' is a key area of the economy in Wigan Borough, providing goods and services essential to the wellbeing of the population.
- 5.4.2 Employment in office-related sectors (comprising of the information and communication, financial and insurance, property, professional, scientific and technical, and business administration and support services sectors) contributes to 17.4% of employment in the borough, a lower proportion than in the FEMA (26.0%), Greater Manchester (30.3%), and England (28.2%).
- 5.4.3 Meanwhile, the proportion of employment in industrial sectors (comprising the construction, manufacturing, motor trades, and transport and storage sectors) is higher in the borough (26.6%), than in the FEMA (22.6%), Greater Manchester (19.3%), and nationally (19.2%).
- 5.4.4 The sectoral breakdown of employment in Wigan Borough highlights the importance of the foundational economy to the borough's performance. The services and products within the foundational economy provide those basic goods and services on which every citizen relies, such as care and health services, food, housing, energy, construction, tourism and retail. The employment breakdown by industry in Wigan demonstrates a relatively higher proportion in foundational industries (48%), compared with the FEMA (42%), Greater Manchester (41%) and England (41%)³³.

Table 7 Employment by industry across the study areas

Industry	Wigan	FEMA	GM	England
Agriculture, forestry & fishing (%)	0.3	0.2	0.2	1.3
Mining, quarrying & utilities (%)	0.6	1.0	1.1	1.1
Manufacturing (%)	9.2	7.7	6.7	7.3

³⁰ Office for National Statistics (2021). Jobs density.

³¹ Office for National Statistics (2021). Business Register and Employment Survey.

³² Note, the ONS definition of "Health" includes a wide range of activities, from health care provided by trained medical professionals in hospitals and other facilities; residential care activities through to social work activities.

³³ Definition of the Foundational Economy based on 5-digit SIC codes available at <https://foundationaleconomy.com/activity-classification/>

Industry	Wigan	FEMA	GM	England
Construction (%)	10.1	7.7	5.5	4.9
Motor trades (%)	1.8	1.7	1.4	1.7
Wholesale (%)	4.1	4.6	4.1	3.6
Retail (%)	10.1	9.0	9.1	9.0
Transport & storage (inc postal) (%)	5.5	5.6	5.8	5.2
Accommodation & food services (%)	7.3	6.4	6.9	7.4
Information & communication (%)	1.4	3.6	3.5	4.5
Financial & insurance (%)	0.9	3.4	3.7	3.6
Property (%)	1.4	2.3	2.4	2.0
Professional, scientific & technical (%)	4.6	7.4	10.8	9.3
Business administration & support services (%)	9.2	9.3	9.9	8.9
Public administration & defence (%)	5.5	5.2	4.4	4.1
Education (%)	8.3	7.9	8.1	8.5
Health (%)	15.6	13.8	13.0	13.1
Arts, entertainment, recreation & other services (%)	4.1	3.3	3.5	4.3

Source: ONS (2021). Business Register and Employment Survey.

5.5 Business Stock

- 5.5.1 ONS UK Business Counts data³⁴ indicates that there were 9,365 enterprises located in Wigan Borough in 2022. When broken down by employment size band, the vast majority of businesses (8,320) were classed as micro (defined as companies employing up to nine employees), making up 88.8% of enterprises. This is broadly aligned with the rates in the FEMA, Greater Manchester, and England. There was a total of 880 small businesses, 135 medium-sized, and 25 large businesses located in the borough. Of these businesses, the construction and professional, scientific, and technical sectors had the largest proportion of enterprises. This is echoed across the FEMA, Greater Manchester, and England.
- 5.5.2 However, when considering business density, Wigan Borough has 282 enterprises per 10,000 of the population. This is the second lowest across Greater Manchester, with only Tameside (274 enterprises per 10,000 of the population) lower³⁵.

³⁴ Office for National Statistics (2022). UK Business Counts - enterprises by industry and employment size band.

³⁵ Derived using the Nomis UK Business Counts 'Number of enterprises' and 'Total population' in 2021.

Table 8 Business counts by employment size band across the study areas

	Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (250+)
Wigan	88.8%	9.4%	1.4%	0.3%
FEMA	89.2%	8.9%	1.5%	0.4%
Greater Manchester	88.8%	9.2%	1.6%	0.4%
England	89.6%	8.5%	1.5%	0.4%

Source: ONS (2022). UK Business Counts enterprises by industry and employment size band.

- 5.5.3 In regard to economic performance, the largest proportion of turnover revenue per business is in the £100,000-£199,000 category, with 32.5% of businesses turning over this amount. This mirrors the trend in the FEMA, Greater Manchester, and England. Approximately 875³⁶ businesses generated a turnover of £1 million or more in Wigan Borough in 2022, and these businesses were mainly manufacturing, wholesale, and construction enterprises. Across the borough, the only businesses to generate £50 million or more in turnover were manufacturing enterprises.
- 5.5.4 Business demography data³⁷ demonstrates the annual change in the number of businesses across the UK and Table 9 below illustrates demography in Wigan between 2016 and 2021. It shows that during this period, there was a net increase in businesses in Wigan almost every year, with more births than deaths recorded.

Table 9 Business demography in Wigan

	2016	2017	2018	2019	2020	2021
Births	1,290	1,155	1,085	1,300	1,320	1,375
Deaths	940	1,205	990	1,020	1,015	1,190
Net Change	350	-50	95	280	305	185

Source: ONS (2021). Business Demography.

5.6 Qualifications and Skills

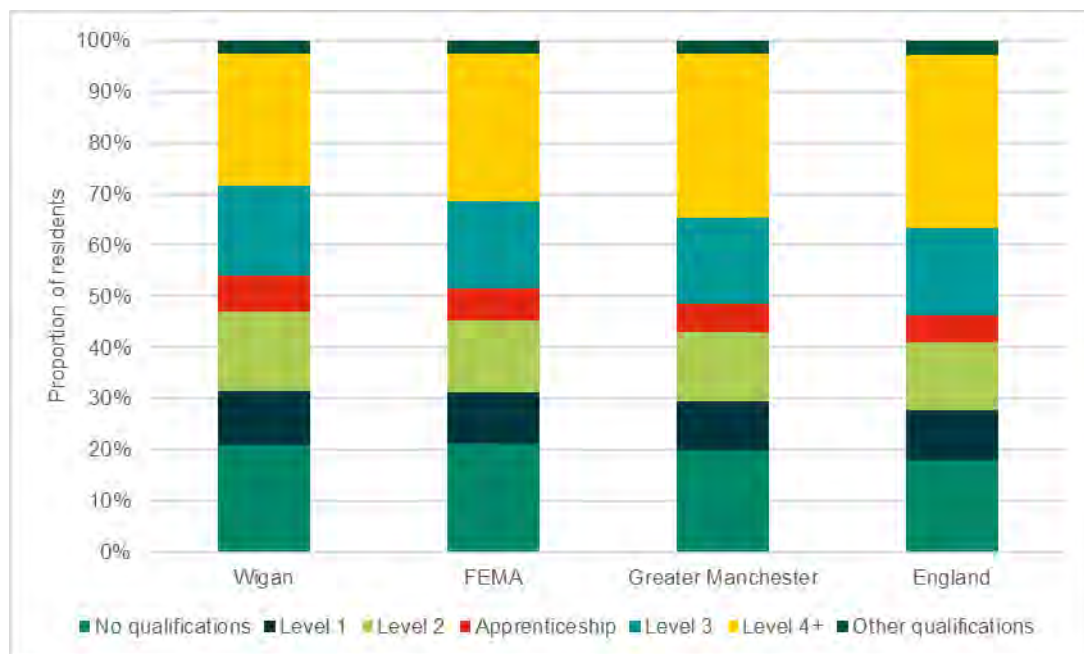
- 5.6.1 The proportion of residents in Wigan Borough aged 16 or over with a qualification at NVQ4 level or above³⁸ is 25.8%. This is lower than the average across the FEMA (28.7%), Greater Manchester (31.9%), and England (33.9%). With regard to residents with no qualifications, 21.1% of residents hold no qualifications in the borough, similar to that in the FEMA and Greater Manchester, but higher than the proportion in England (18.1%).

³⁶ Rounded to the nearest 5.

³⁷ Office for National Statistics (2021). Business Demography.

³⁸ NVQ Level 4 or above qualifications include: Degree (for example BA, BSc), Higher Degree (for example MA, PhD, PGCE), NVQ Level 4-5, HNC, HND, RSA Higher Diploma, BTEC Higher level, Foundation degree (NI), Professional qualifications (for example teaching, nursing, accountancy)

Figure 9 Highest level of qualification across the study areas



Source: ONS (2021). Census 2021: Highest level of qualification.

- 5.6.2 Over the last decade, the outlook on skills and qualifications has improved in Wigan Borough, particularly within the Level 4+ category whereby the proportion achieving this level increased from 19.5% in 2011 to 25.8% in 2021. Meanwhile, the proportion of residents with no qualifications decreased from 27.3% in 2011 to 21.1% in 2021. This suggests that Wigan Borough is experiencing positive growth in skills and educational attainment, albeit the borough continues to lag behind many boroughs across Greater Manchester.
- 5.6.3 Consultation undertaken in support of this study highlighted that the borough has a strong foundation of high-performing schools, with 88% of children in Good and Outstanding schools as of 2023, higher than Greater Manchester (84%) and the national average (86%). This translates to an Attainment 8 score at Key Stage 4 of 49.7, with only Trafford (60.2) and Stockport (52.7) higher across Greater Manchester.
- 5.6.4 Despite having similarly high performing further and higher education colleges, consultees reflected a lack of opportunities available at a graduate level within the borough, linked to the sectoral composition of the local economy and preponderance of SMEs which can be viewed to offer more limited opportunities and scope for progression. This leads to graduates leaving or commuting outside the borough to access these opportunities, or lowering their aspirations despite holding a degree to remain in the area, with the view that there is a need to secure higher value anchor employers within the borough to retain graduates and encourage the uptake of degree level qualifications, such as degree level apprenticeships which are in demand given the cost associated with university attendance.
- 5.6.5 Conversely, further education providers reflected strong demand for apprenticeships, with rates for people practising these in Wigan Borough higher than the national average, and strong linkages in place between the local business community and providers. Key sectors for such opportunities included manufacturing/engineering, construction and health and social care.

5.7 Earnings and GVA

- 5.7.1 The Annual Survey of Hours and Earnings³⁹ shows that the median annual gross pay for full time workers who reside in Wigan Borough was £29,553 in 2022. This was in line with earnings in the FEMA, but slightly lower than across Greater Manchester and England. Workplace-based earnings show that for those who work in Wigan Borough, annual gross pay was £28,355, less than earnings across the FEMA, Greater Manchester, and England. The difference between resident-based⁴⁰ and

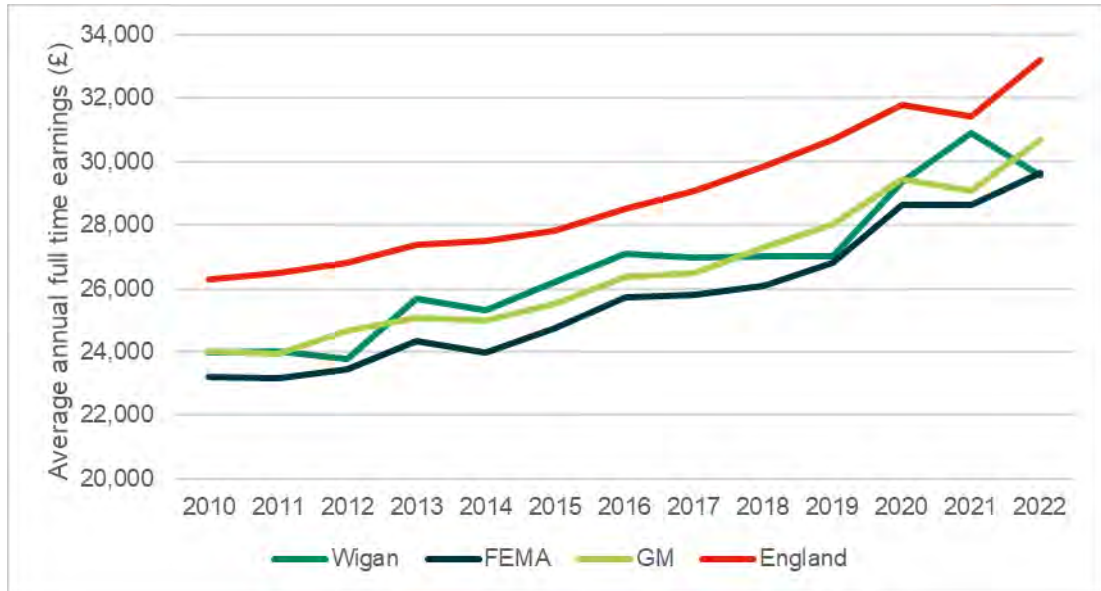
³⁹ Office for National Statistics (2022). Annual Survey of Hours and Earnings.

⁴⁰ Earnings by people residing in Wigan (regardless of where they work).

workplace-based⁴¹ earnings reflects anecdotal evidence that the borough’s residents may commute out of the borough to access higher-paying jobs elsewhere.

- 5.7.2 Figure 10 shows resident-based earnings over time. Whilst Wigan Borough made progress in closing the earnings gap with England in 2021, it has since decreased, and the gap has widened again. However, looking at average earnings for the FEMA, the borough has performed above average over the past 10+ years, and broadly in line with Greater Manchester.

Figure 10 Median average annual earnings (full-time workers) across the study areas (resident-based)

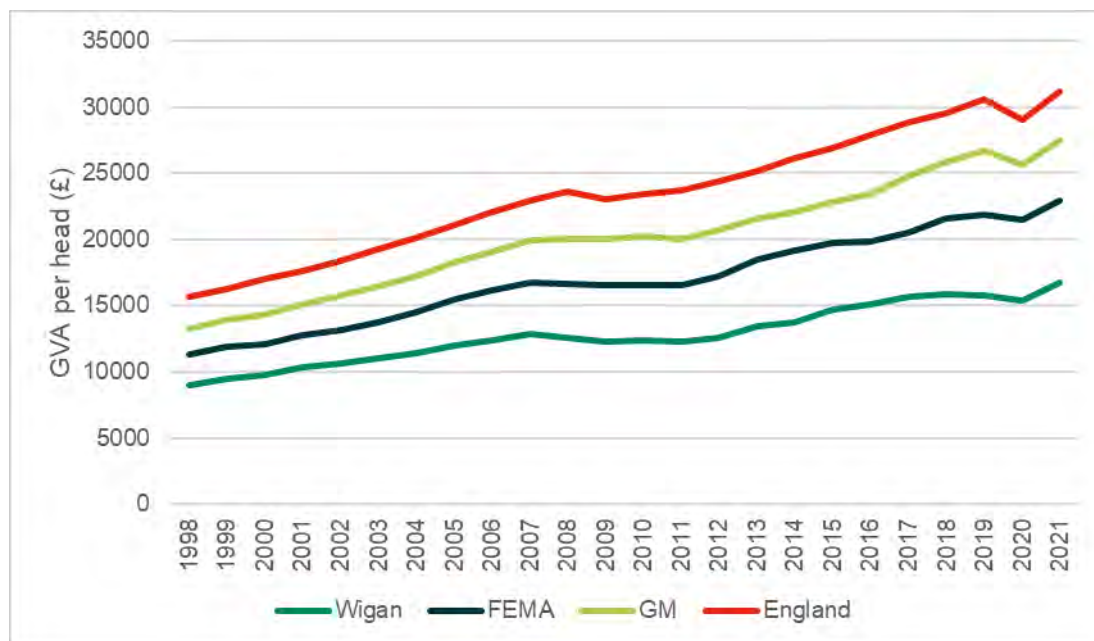


Source: ONS (2022). Annual Survey of Hours and Earnings.

- 5.7.3 Productivity, as measured by GVA per head, in Wigan Borough stood at £16,712 in 2021, lower than the FEMA (£22,953), Greater Manchester (£27,452) and England (£31,138). As shown in Figure 11, these gaps are persistent and have widened since the late 2000s, likely driven by a more muted recovery from the global financial crisis in the borough.

⁴¹ Earnings by people working in Wigan (regardless of where they live).

Figure 11 GVA per head across the study areas



Source: ONS (2022). Regional gross value added (balanced) at current prices.

- 5.7.4 Taken together, the earnings and productivity data reflect the sectoral breakdown in the borough, with a lack of employment in key growth/high productivity sectors such as ICT and financial services⁴². Centre for Cities analysis highlights that the borough registers just 6.1% of employment in knowledge intensive business services, compared with 13.8% nationally⁴³.
- 5.7.5 Attracting higher value firms, encouraging business investment and building on improvements in educational attainment in Wigan Borough will be imperative to closing the earnings and productivity gap. In this regard, Wigan Council released an Employment and Skills Strategy in 2020²⁰ which included an objective to develop provision of education post-16 in the workforce through creation of apprenticeships and engagement with higher education institutes.

⁴² Wigan Council (2013). Wigan Local Plan Core Strategy.

⁴³ [Wigan | Centre for Cities](#)

6. Property Market Assessment

6.1 Introduction

- 6.1.1 This section provides a review of property market indicators in Wigan Borough. Reference is also made to comparator geographies, namely the FEMA, Greater Manchester and England. This reflects the fact that the commercial property market in the borough is not self-contained, and instead forms part of a much wider market area encompassing the FEMA and combined authority area to some extent and which varies by type of floorspace.
- 6.1.2 Data presented in this section is derived from CoStar which represents a comprehensive database of recent property market data. Trends are presented where applicable, otherwise data for 2023 Q2 is shown, being the most recent period for which complete data is available at the time of writing. All data presented reflects that which is available and is subject to gaps and inaccuracies.
- 6.1.3 Employment-generating properties comprised of office, light industrial, general industrial, and storage and distribution types are considered, in line with the definition of employment land. The relationship between historic and new planning use classes, their relationship to CoStar primary and secondary property type classification, and nomenclature adopted for this report, are shown in Table 10 below. It is recognised that there are other property types which may contribute to employment, but these will not be analysed for the purposes of this evidence base.

Table 10 Property type classification

Pre-2021 planning Use Class	New planning Use Class	CoStar primary type	CoStar secondary type
B1a (revoked) – Offices	E(g)(i) – Offices to carry out any operational or administrative function	Office	<ul style="list-style-type: none"> All
B1b (revoked) – Research and development of products or processes	E(g)(ii) – Research and development of products or processes	Light industrial	<ul style="list-style-type: none"> R&D
B1c (revoked) – Industrial Processes	E(g)(iii) – Uses which can be carried out in a residential area without detriment to its amenity: industrial processes	Light industrial	<ul style="list-style-type: none"> Light distribution Light manufacturing Showroom (light industrial)
		Industrial	<ul style="list-style-type: none"> Light industrial
B2 – General industrial (other than E(g))	B2	Industrial	<ul style="list-style-type: none"> Food processing Manufacturing Service
B8 – Storage and Distribution	B8	Industrial	<ul style="list-style-type: none"> Distribution Warehouse Refrigeration/Cold storage Truck terminal Showroom (industrial)

Source: AECOM.

- 6.1.4 This section is divided into three sub-sections covering the office market (E(g)(i))⁴⁴, the light industrial market (E(g)(iii)), and the industrial and warehousing market (B2 and B8).
- 6.1.5 This section considers the following property market indicators for each property type:
- Total building stock and floorspace;

⁴⁴ Note: No E(g)(ii) properties were identified in Wigan and therefore this section only reports E(g)(i) properties

- Building stock size;
- Vacancy rate and vacant floorspace;
- Building stock age;
- Building stock condition;
- Market rent and asking rent;
- Net absorption;
- Affordability; and
- Recent market activities.

6.2 Office Market [E(g)(i)]

6.2.1 This section presents findings relating to the office property market in Wigan Borough.

Buildings and Floorspace

6.2.2 The local office market in Wigan Borough provides approximately 257,000 m² of floor space across 337 properties. Office premises are primarily located in the key centres of Wigan and Leigh. Wigan Borough accounts for approximately 21% of office floorspace across the FEMA and circa. 4% of total office floorspace across Greater Manchester.

6.2.3 Wigan Borough has a relatively small office market in relation to its neighbours Bolton (337,000 m²), Salford (924,000 m²) and Warrington (638,000 m²), though it offers a greater amount of floorspace than St Helens (147,000 m²), Chorley (85,000 m²) and West Lancashire (70,000 m²). In relation to Greater Manchester, only Oldham (203,000 m²), Rochdale (149,000 m²) and Tameside (118,000 m²) have less office floorspace than Wigan Borough.

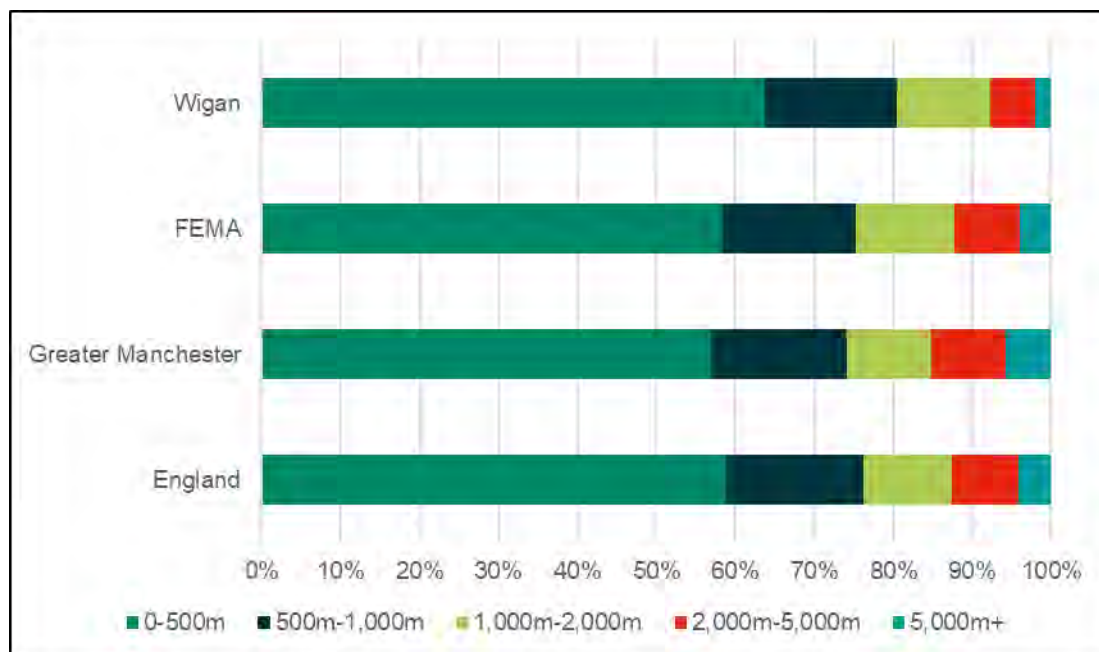
Table 11 Office [E(g)(i)] properties – buildings and floorspace (2023 Q2)

	Wigan	FEMA	Greater Manchester	England
Number of properties	337	1,160	4,796	94,850
Floorspace (m ²)	256,663	1,236,687	6,275,559	109,440,678

Source: CoStar 2023

6.2.4 In all, 63.8% of office premises in buildings in Wigan Borough are under 500 m² in size, notably higher than the FEMA (58.4%), Greater Manchester (56.9%) and England (58.9%). There are only seven premises larger than 5,000 m² in Wigan Borough, including Wigan Investment Centre, offices on Greenbank Industrial Estate in Hindley, at South Lancashire Industrial Estate, Ashton and at Trencherfield Mill, Wigan. These account for 2.1% of total premises, lower than the FEMA (4.0%), Greater Manchester (5.7%) and England (4.2%). This shows that Wigan Borough's office premises are mostly small, although there are some larger premises remaining, as set out in Figure 12.

Figure 12 Office [E(g)(i)] properties - building stock size (% of buildings)



Source: CoStar 2023

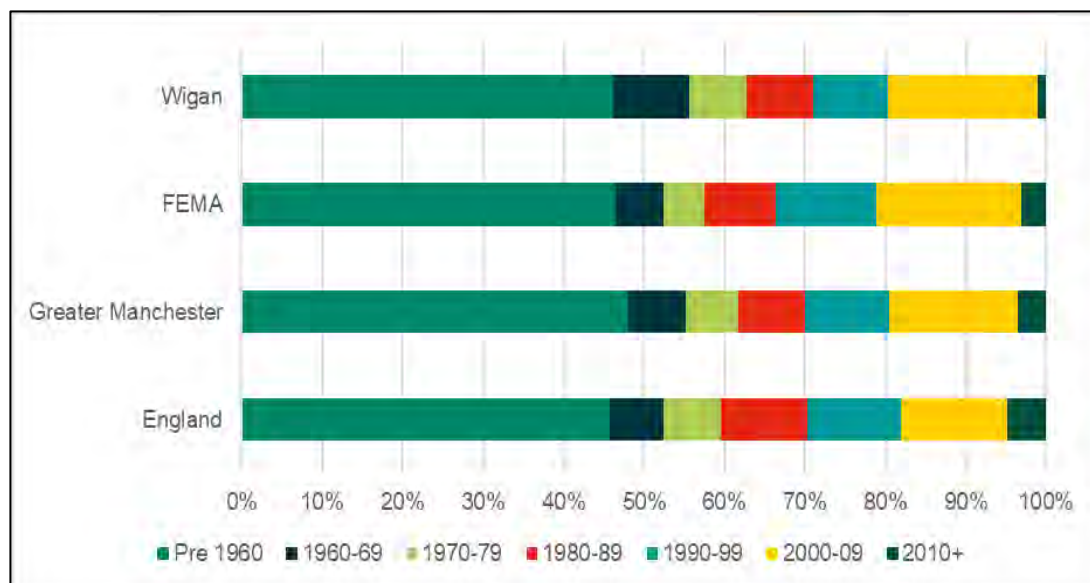
6.2.5 During consultation, agents noted that smaller office properties are most popular amongst occupiers. There are relatively few medium to large office properties, and these experience much lower demand and are a challenge to let. It is suggested that this decrease in demand is due to many companies downsizing since the pandemic. For larger office properties, agents are recommending to owners that properties are split into smaller units.

Age

6.2.6 The breakdown of office buildings by age indicates that just 1.1% of office buildings in Wigan Borough have been constructed since 2010, lower than the FEMA (3.1%), Greater Manchester (3.5%) and England (4.9%). However, a high proportion of office buildings were constructed between 2000-09 (18.6%), many of which utilised European funding to fill the viability gap. While similar to the FEMA (18.1%), the proportion was higher than Greater Manchester (16.1%) and England (13.1%). Wigan Borough has a similar proportion of older stock, constructed before 1990 (71%), compared with Greater Manchester (71.0%) and England (70.3%), though higher than the FEMA (66.4%).

6.2.7 Agents have noted that modernisation is a key challenge for the office market, and very few properties have been constructed in recent years in Wigan Borough. There has been a noticeable increase in demand for modern, good quality office space to help with both retention and recruitment of staff. With more people working from home increasingly, staff feel more likely to visit the office if the space is good quality and attractive.

Figure 13 Office [E(g)(i)] properties - building stock age (% of buildings)



Source: CoStar 2023

Vacancy

6.2.8 As of Q2 2023, 7,042 m² of office floorspace was vacant in Wigan Borough, amounting to a vacancy rate of 2.7%. The vacancy rate is considerably lower than the FEMA (8.0%), Greater Manchester (8.8%) and England as a whole (7.3%). The vacancy rate in the borough is considerably below the frictional vacancy rate of ~8% which indicates a balanced market in terms of supply and demand. The current vacancy rate in the borough therefore reflects potential supply constraints within the market, whereas the comparator areas are broadly in balance.

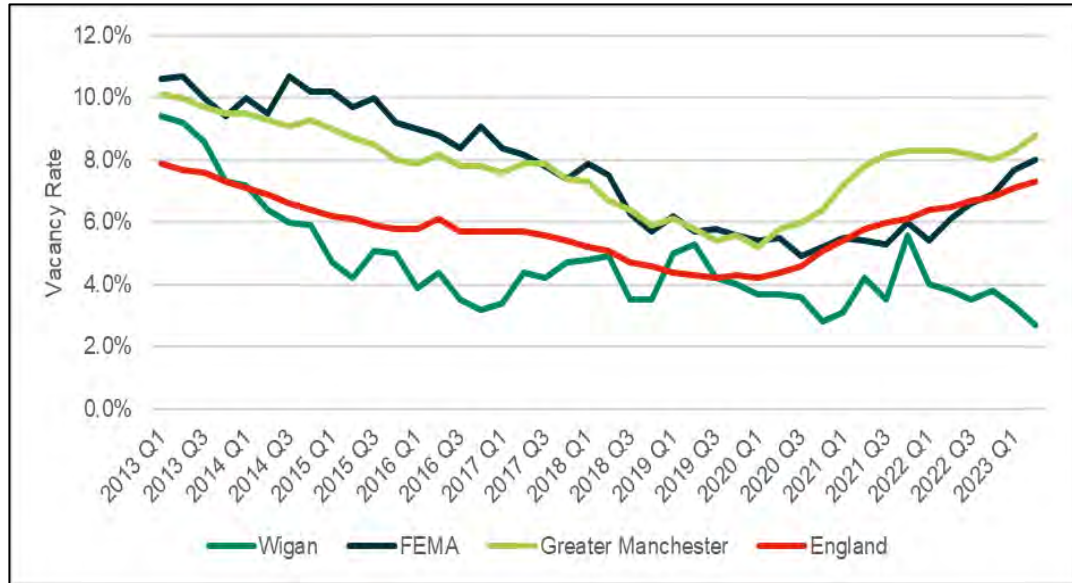
Table 12 Vacancy of Office [E(g)(i)] floorspace

	Wigan	FEMA	Greater Manchester	England
Vacancy rate (%)	2.7%	8.0%	8.8%	7.3%
Vacant floorspace (m ²)	7,042	99,176	553,721	8,003,831

Source: CoStar 2023

6.2.9 Figure 14 shows the change in office vacancy rates over the past decade. Vacancy rates in the borough saw a sharp decrease between Q1 2013 (9.4%) to Q2 2015 (4.2%) and have fluctuated around 4% since this period, despite a drop-off in recent quarters to stand at the current rate of 2.7%. The vacancy rate in the borough has been below that of the FEMA and Greater Manchester throughout the past decade and has been below the national rate for large parts of the past 10 years. It is notable that, while all comparators experienced an increase in the office vacancy rate from 2020, likely driven by the Covid-19 pandemic, the borough has seen a fall from the end of 2021 whereas the FEMA, Greater Manchester and England have continued to register rises in the vacancy rate over the same period.

Figure 14 Office Vacancy Rate (% , 2013 – 2023)



Source: CoStar 2023

Rent

- 6.2.10 Office floorspace in Wigan Borough attracts considerably lower market rent (£133.26/m²) than across the comparator areas, being 41.8% lower than the FEMA (£189.01/m²) and 64.4% lower than the average across Greater Manchester (£219.05/m²).
- 6.2.11 However, office market rents are similar to neighbouring areas such as Bolton (£146.39/m²), St Helens (£135.63/m²), Chorley (£140.36/m²) and West Lancashire (£126.58/m²)

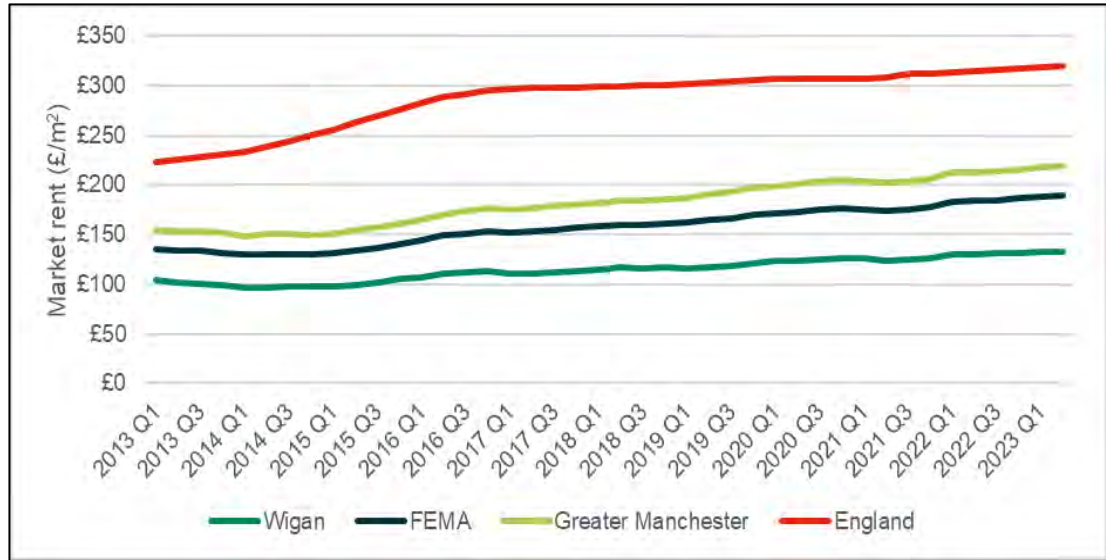
Table 13 Office [E(g)(i)] properties - market rent (2023 Q2)

	Wigan	FEMA	Greater Manchester	England
Market Rent (£/m ²)	£133.26	£189.01	£219.05	£319.04

Source: CoStar 2023

- 6.2.12 Figure 15 presents the change in rental values in Wigan Borough and the comparators over the past decade. It shows that rental values for office properties have risen slightly over the past decade in Wigan, at an average pace of 0.62% per quarter. Meanwhile, properties in the FEMA, Greater Manchester, and England increased by 0.83% per quarter or more, representing a faster increase.

Figure 15 Office [E(g)(i)] properties - market rent (£/m²) (2013 – 2023 Q2)

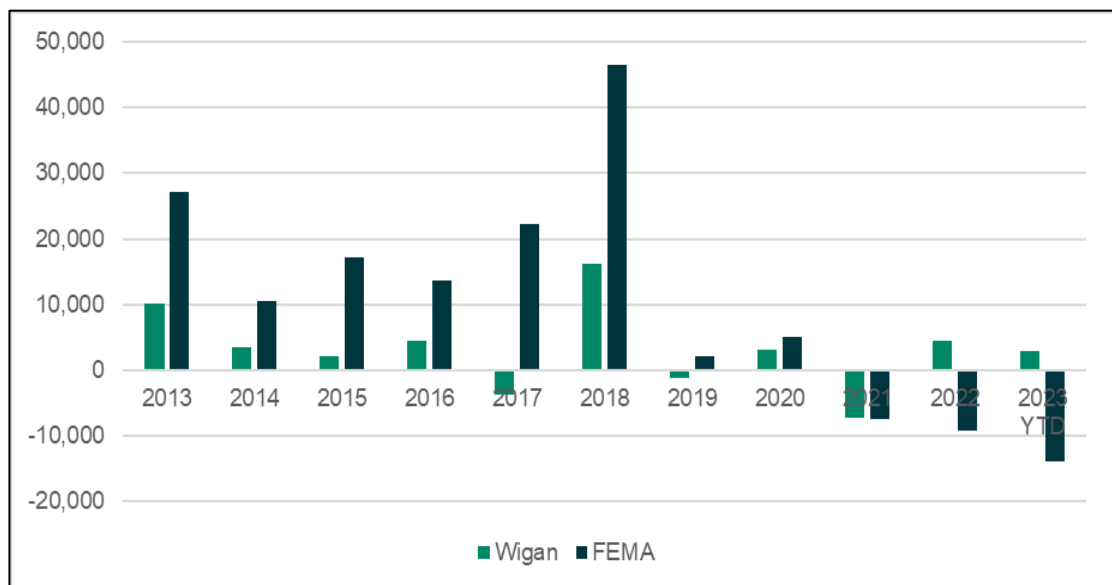


Source: CoStar 2023

Net Absorption

- 6.2.13 Net absorption provides another angle on demand. The measure expresses the change in the overall quantum of occupied floorspace, typically recorded year on year. Positive annual net absorption means that a greater amount of space has been occupied from a given year to the next. Net absorption is not the reverse of vacancy, as vacancy is an expression of the level of non-occupancy against total stock. In office markets where stock may be in decline, for example due to the conversion of offices to residential use, vacancy may reduce but net absorption would be negative.
- 6.2.14 Figure 16 below presents the net absorption for Wigan Borough and the FEMA. Net absorption in the borough has been mostly positive between 2013 and 2023, which provides some evidence of positive demand, with the exception of 2017, 2019 and 2021. However, recently absorption has been at or near neutral. Across the FEMA, net absorption was positive over the period 2013-2020, however the FEMA has experienced negative net absorption from 2021 onwards, indicating a slackening of demand likely linked to the impact of Covid-19 on the office market.

Figure 16 Historic net absorption of office [E(g)(i)] floorspace (2013 - 2023 YTD, m²)

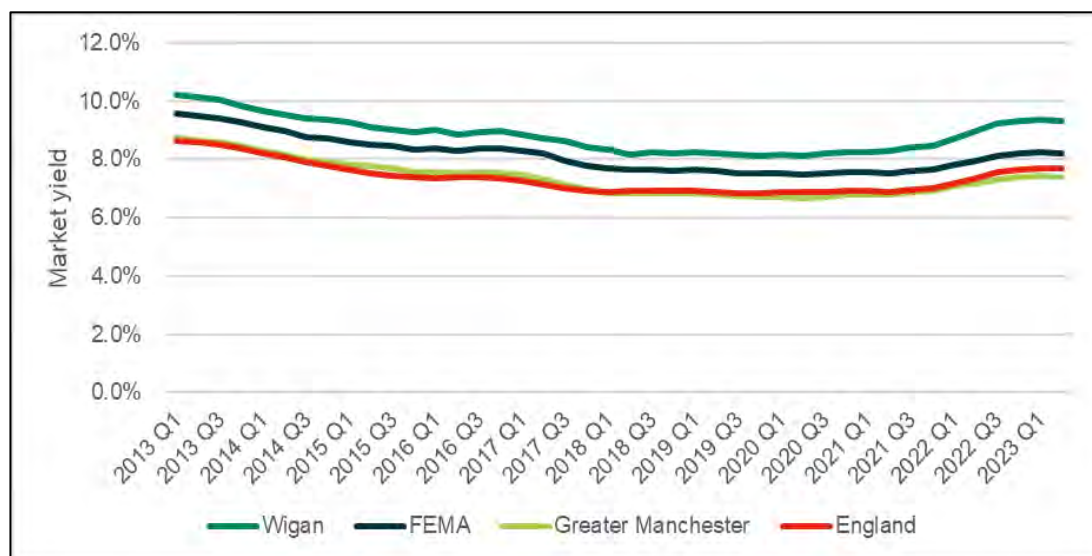


Source: CoStar 2023

Viability and Affordability

- 6.2.15 In Q2 2023, the market yield for office space in Wigan Borough stood at 9.3%, which is higher than in the FEMA, Greater Manchester, and England. As shown in Figure 17 market yield for office space in Wigan showed a gradual decrease until late 2021 when it began to increase. This reflects an established trend whereby market yields spiked in the global financial crisis before recovering over the 2010s before the Covid-19 pandemic and ensuing disruption saw yields rise once again. A high yield generally represents a higher risk profile, which can deter investment.

Figure 17 Office [E(g)(i)] properties – market yield (%)



Source: CoStar 2023

- 6.2.16 It is difficult to comment on affordability of office space in Wigan Borough, as affordability is not only a question of price (rental value) for occupiers, but also of access to the appropriate space, and providing the required services.
- 6.2.17 In pure financial aspects (i.e. rental value), Figure 15 shows that the borough provides affordable office space in comparison to the FEMA, Greater Manchester, and England. Between Q1 2013 and Q2 2023, rental values increased in the borough by an average of 0.62% per quarter. This increase was lower than the FEMA, Greater Manchester, and national increases (0.83%, 0.87%, and 0.88%). This would suggest that from a financial point of view⁴⁵, Wigan Borough is maintaining its level of affordability.
- 6.2.18 However, following consultation with agents, it is suggested that in Wigan Borough, both rents and yields are generally low and do not substantiate extending or refurbishing existing offices. In addition, construction and operating costs have risen in recent years whilst rents have not and so it is not seen as viable to build new offices in the borough.

Office Market Conclusions

- 6.2.19 The office market in Wigan Borough currently accommodates approximately 257,000 m² of floorspace and comprises around 21% of office floorspace across the FEMA. Premises are mostly small in size, and clusters of office space can be found in Wigan town centre and Leigh. Almost half of buildings were constructed before 1960, with very few being constructed since 2010.
- 6.2.20 Analysis shows that demand for office premises in Wigan is generally positive with a vacancy rate of 2.7%, considerably lower than averages in the FEMA, Greater Manchester, and England. Net absorption has also been positive over the last decade, however, there has been a slackening of demand over the past 5 years.

⁴⁵ Note that this does not take into considerations other financial costs of rental and deductions such as service charge, business rate, or months free rent for example.

- 6.2.21 Despite positive trends in vacancy rates and net absorption, rental values are considerably lower than in the FEMA and Greater Manchester, and nationally, and have been so for the past decade. Indeed, the market rent for office space in the borough is the lowest across Greater Manchester as of Q3 2023. Wigan Borough experiences rental values that sit 34.7% lower than the FEMA and 87.8% lower than the average across Greater Manchester.
- 6.2.22 In regard to viability, market yields for office space in the borough are higher than comparator areas, indicating a higher risk profile, which can deter investment. Wigan Borough is an affordable place to rent office floorspace from a financial viewpoint and is maintaining its level of affordability. However, this could be impacted by recent increases in construction and maintenance costs as noted during consultation with local agents.

6.3 Industrial Market [E(g)(iii), B2 and B8]

- 6.3.1 This section presents findings relating to the industrial property market in Wigan Borough. Industrial properties, comprising industrial, manufacturing, light industrial, and storage and distribution functions are dispersed amongst the settlements of Wigan, with some remote properties also contributing industrial employment space. Key activity areas include the centres of Wigan, Leigh, Atherton, and Golborne, and various industrial estates on the outskirts of Ashton, Standish, and Pemberton.

Buildings and Floorspace

- 6.3.2 There are 72 light industrial properties in Wigan Borough, comprising 89,388 m² of floorspace. The light industrial floorspace in the borough accounts for approximately 25% of the light industrial floorspace in the FEMA and 7% of the light industrial floorspace across Greater Manchester.
- 6.3.3 There are 614 general industrial and storage and distribution properties in Wigan Borough, comprising circa. 1,950,000 m² of floorspace. General Industrial and Storage and Distribution floorspace accounts for 37% of total floorspace across these use classes in the FEMA, significantly higher than the proportions associated with office (21%) and light industrial (25%) uses in the borough as a proportion of stock across the FEMA.

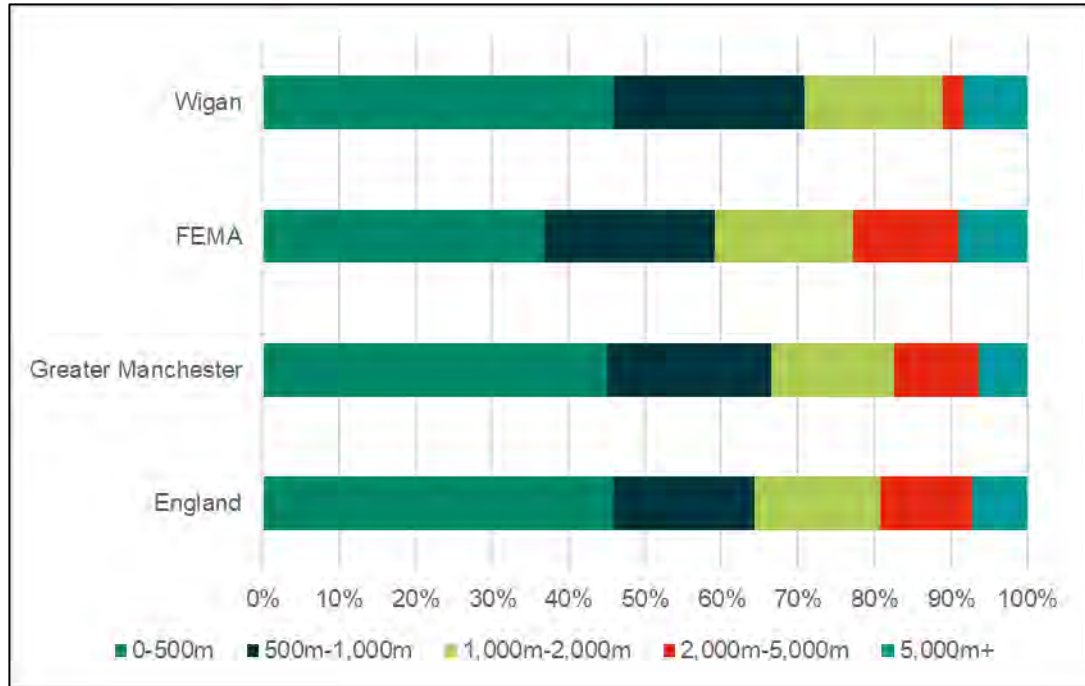
Table 14 Industrial properties – buildings and floorspace (2023 Q2)

	Wigan	FEMA	Greater Manchester	England
Light Industrial [E(g)(iii)]				
Number of Properties	72	205	930	13,496
Floorspace (m ²)	89,388	360,003	1,331,183	19,389,442
General Industrial and Storage and Distribution [B2; B8]				
Number of Properties	614	1,857	5,873	85,838
Floorspace (m ²)	1,948,251	5,220,772	16,530,510	238,808,596

Source: CoStar 2023

- 6.3.4 In all, 45.8% of light industrial premises in Wigan Borough are under 500 m² in size, notably higher than the FEMA (36.8%), but broadly in line with Greater Manchester (44.9%) and England (45.9%). There are only two premises within the 2,000 - 5,000 m² size bracket in the borough, based at Lamberhead Industrial Estate and Martland Park, accounting for 2.8% of total premises. This is markedly lower than the FEMA (13.6%), Greater Manchester (11.1%) and England (12.0%).

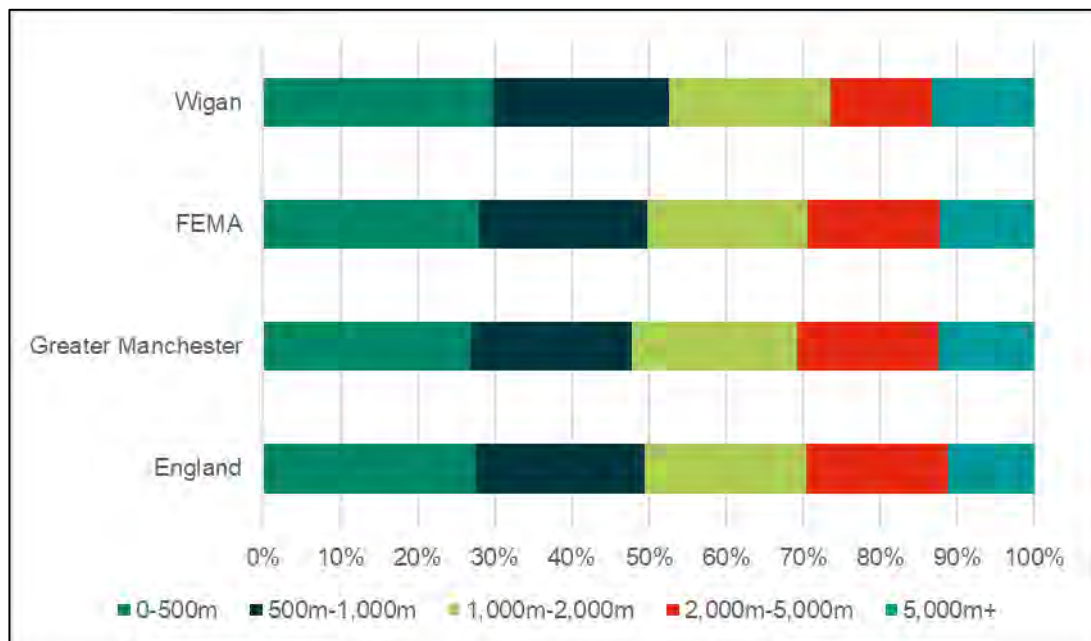
Figure 18 Light industrial [E(g)(iii)] - building size (m²)



Source: CoStar 2023

6.3.5 When considering General Industrial (B2) and Storage and Distribution (B8) floorspace, a similar picture is evident with Wigan Borough having proportionally higher stock in the 0 – 1,000 m² size bracket (52.6%) and the 5,000 m²+ size bracket (13.4%) than the comparator areas. However, the borough has a notably lower proportion of stock within the 2,000-5,000 m² size bracket (13.0%) compared with the FEMA (17.1%), Greater Manchester (18.2%) and England (18.2%).

Figure 19 General Industrial [B2] and Storage and Distribution [B8] - building size (m²)



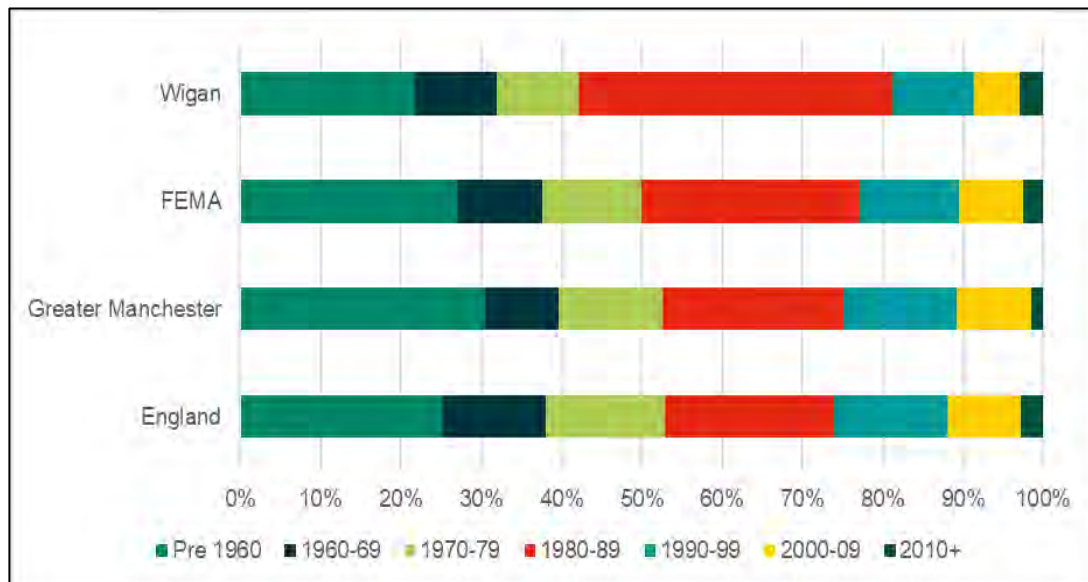
Source: CoStar 2023

Age

6.3.6 Wigan Borough has a notably smaller proportion of light industrial buildings constructed pre-1960 (21.7%) compared with the FEMA (27.2%), Greater Manchester (30.4%) and England (25.1%). A large proportion of light industrial buildings in the borough were constructed in the 1980s (39.1%) – almost

double the proportion in Greater Manchester (22.6%) and England (21.1%). This was likely driven by regeneration funding associated with the closure of the mines in the borough and includes the development of large sites such as Martland Park. However, just 18.8% of light industrial buildings have been constructed since 1990, lower than the FEMA (22.8%), Greater Manchester (24.8%) and England (26.0%).

Figure 20 Light industrial [E(g)(iii)] – building stock age (% of buildings)



Source: CoStar 2023

6.3.7 Wigan Borough has a smaller proportion of general industrial and storage and distribution buildings constructed before 1980 (32.9%) compared with the FEMA (35.7%), Greater Manchester (38.6%) and England (34.2%). At the other end of the age spectrum, 7.8% of general industrial and storage and distribution buildings were constructed since 2010 which, while lower than the national average (8.5%) is higher than the FEMA (7.5%) and Greater Manchester (6.1%). A notable proportion of the borough's general industrial and storage and distribution buildings were constructed in the 1990s (22.0%) compared with the FEMA (19.5%), Greater Manchester (17.3%) and England (18.6%).

Figure 21 General Industrial [B2] and Storage and Distribution [B8] – building stock age (% of buildings)



Source: CoStar 2023

Vacancy

- 6.3.8 As of Q2 2023, 1,191 m² of light industrial floorspace was vacant in Wigan Borough, amounting to a vacancy rate of 1.3%. The vacancy rate is marginally higher than the FEMA (0.9%), but lower than that registered in Greater Manchester (1.6%) and England as a whole (2.3%).
- 6.3.9 There is 48,582 m² of vacant General Industrial and Storage and Distribution floorspace across the borough, amounting to a vacancy rate of 2.5%, marginally lower than the FEMA (2.6%) and Greater Manchester (2.7%), and almost one percentage point lower than the national average of 3.4%.

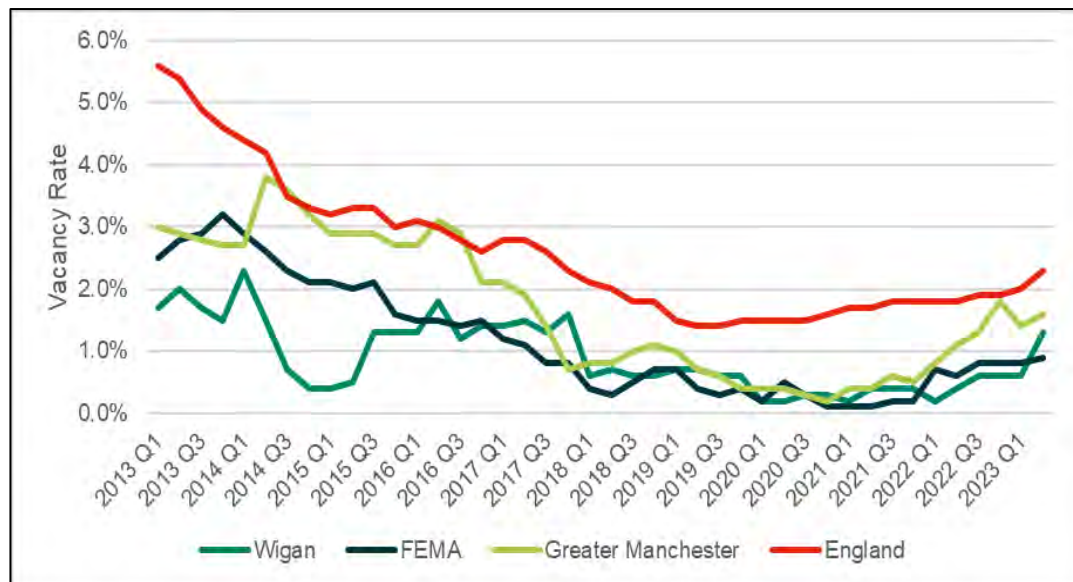
Table 15 Industrial Properties – Vacancy (2023 Q2)

	Wigan	FEMA	Greater Manchester	England
<i>Light Industrial [E(g)(iii)]</i>				
Vacancy Rate (%)	1.3%	0.9%	1.6%	2.3%
Vacant Floorspace (m ²)	1,191	3,371	20,750	437,513
<i>General Industrial and Storage and Distribution [B2; B8]</i>				
Vacancy Rate (%)	2.5%	2.6%	2.7%	3.4%
Vacant Floorspace (m ²)	48,582	133,817	449,427	8,131,768

Source: CoStar 2023

- 6.3.10 Figure 22 shows the change in light industrial vacancy rates over the past decade. Light industrial vacancy rates in Wigan Borough have remained well below the English average over the past decade, averaging 0.9% compared with 2.6% across England. Despite being below the FEMA and Greater Manchester average between 2013-2017, the light industrial vacancy rate across the borough, the FEMA and Greater Manchester has been around the same level from 2018 onwards.

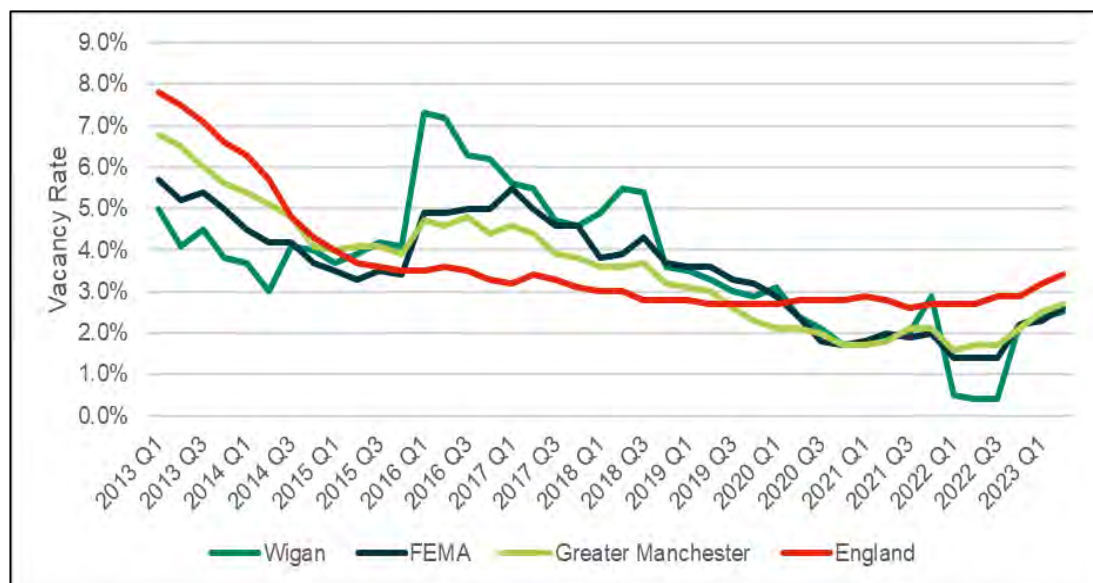
Figure 22 Light industrial [E(g)(iii)] – vacancy rate (%), 2013 – 2023)



Source: CoStar 2023

- 6.3.11 The vacancy rate for general industrial and storage and distribution floorspace in Wigan Borough over the ten-year period to 2023 has shown some variation around the regional and national vacancy rate. Although the vacancy rate has remained mostly below the wider comparator geographies, there was a marked increase over the 2016-2018 period when the borough exceeded all comparators. The ten-year average vacancy rate for the borough (3.7%) is in line with the national average, and marginally higher than the FEMA and Greater Manchester (both 3.5%).

Figure 23 General industrial [B2] and Storage and Distribution [B8] - vacancy rate (%)



Source: CoStar 2023

Rent

6.3.12 Light Industrial floorspace in Wigan Borough attracts similar market rent (£75.46/m²) to the FEMA (£71.15/m²) and Greater Manchester (£81.48/m²), though falls below the national average of £113.99/m².

6.3.13 A similar, but far less pronounced, picture is evident in relation to General Industrial and Storage and Distribution floorspace. At £85.90/m², market rental values across B2 and B8 use classes similar to the FEMA (£85.47/m²), the Greater Manchester average (£88.16/m²), and the national average of £89.02/m².

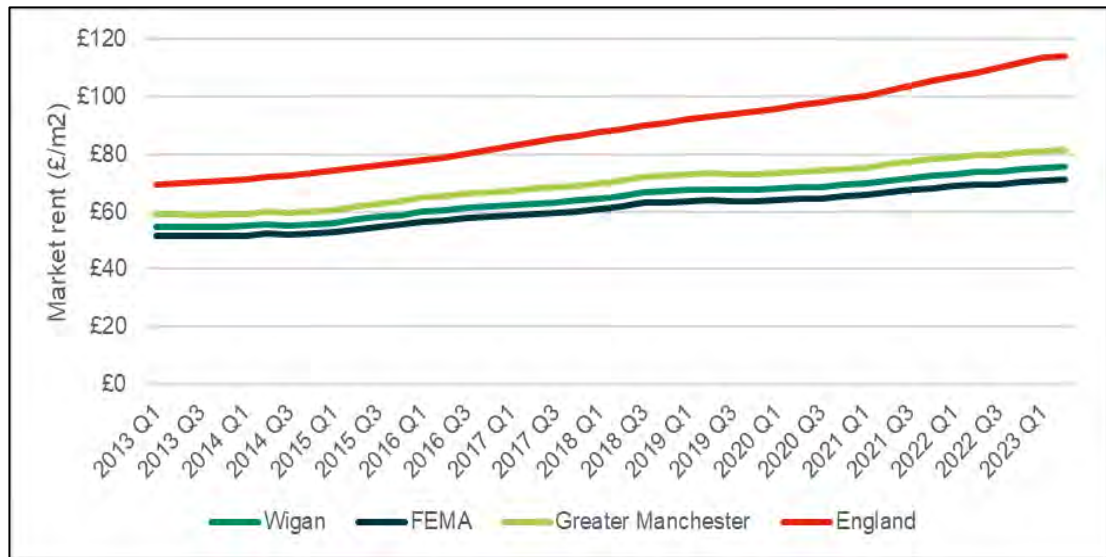
Table 16 Industrial properties – rental values (2023 Q2)

	Wigan	FEMA	Greater Manchester	England
<i>Light Industrial [E(g)(iii)]</i>				
Market Rent (£/m ²)	£75.46	£71.15	£81.48	£113.99
<i>General Industrial and Storage and Distribution [B2; B8]</i>				
Market Rent (£/m ²)	£85.90	£85.47	£88.16	£89.02

Source: CoStar 2023

6.3.14 Figure 24 presents the change in light industrial rental values in Wigan Borough and the comparators over the past decade. It shows that rental values in the borough are 5.7% higher than in the FEMA, but 8.0% lower than in Greater Manchester and 51.1% lower than the national average. Values have risen steadily over time, rising from £54.79 in Q1 2013 to £75.46 in Q2 2023. This trend is mirrored across each of the comparator geographies also.

Figure 24 Light industrial [E(g)(iii)] - market rent (£/m²)



Source: CoStar 2023

6.3.15 Figure 25 presents the change in general industrial and storage and distribution rental values in Wigan Borough and the comparators over the past decade. Values across each geography have experienced similar growth over time, having risen steadily. At present, values in the borough are very similar to those in the FEMA, 2.6% lower than in Greater Manchester, and 3.6% lower than in England.

Figure 25 General industrial [B2] and Storage and Distribution [B8] – market rent (£/m²)



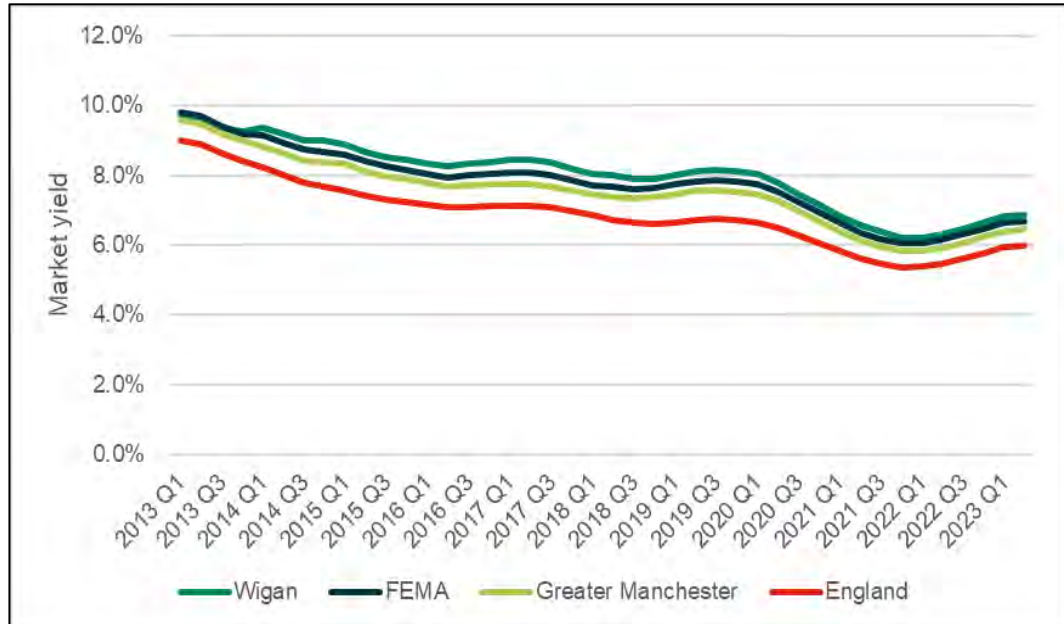
Source: CoStar 2023

6.3.16 It was noted during consultation with agents that the industrial market experienced a boom in rental and land values recently due to a move towards e-commerce (accelerated by the pandemic). This has created demand for warehousing space in the borough. According to the agents, there is currently an undersupply of industrial space in Wigan Borough and so rental values are high. The demand for industrial space is immediate, highlighting a need to balance the short term needs of the sector as well as longer term requirements, with the designation of new or greenfield sites for development having the potential to take a long time to gain planning permission and install infrastructure required for operation.

Viability and Affordability

- 6.3.17 The market yield for light industrial space in Wigan Borough decreased from 9.5% to 6.5% between Q1 2013 and Q2 2023 in the borough, reflecting a similar trend to the other comparator geographies as shown in Figure 26. With higher yields generally reflecting a higher risk profile, which can deter investment, it can be viewed that the attractiveness of light industrial space has increased over the past decade, though yields have risen since the Covid-19 pandemic.

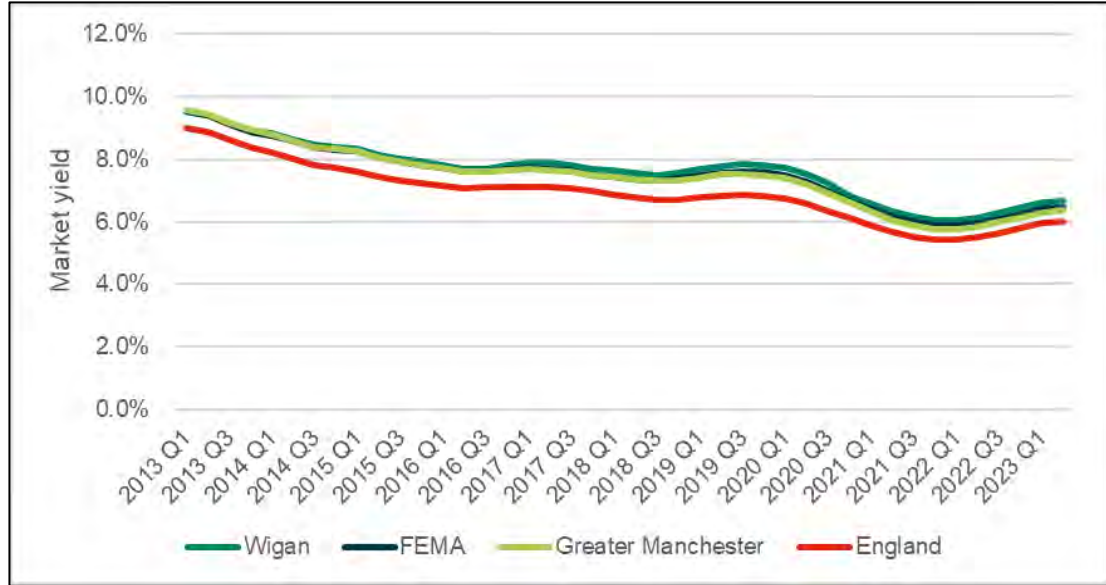
Figure 26 Light industrial [E(g)(iii)] – market yield



Source: CoStar 2023

- 6.3.18 It is difficult to comment definitively on affordability, as affordability is not only a question of price (rental value) for occupiers, but also of access to the appropriate space, providing the required services. It can be particularly true for light industrial businesses, who may find it attractive to pay extra in rent to have access to shared high-tech equipment (i.e. 3d printers, cutting machines, etc.).
- 6.3.19 From a purely financial view (i.e., rental value), Figure 24 shows that Wigan Borough provides affordable light industrial space in comparison to the Greater Manchester and national averages. Rental values increased in the borough between 2013 and 2023, with an average quarterly increase of 0.79%. This is in line with the FEMA and Greater Manchester averages, but lower than England average of 1.22%. This suggests that from a financial point of view, affordability of light industrial space in the borough is increasing compared to the rest of the country however this is likely to be a reflection of there being a higher proportion of lower quality stock with lower rents in the market relatively.
- 6.3.20 For general industrial and storage and distribution, market yields have also decreased over time, as shown in Figure 27, signalling an increase in the attractiveness of B2 and B8 floorspace in the borough, albeit as with light industrial space the market yield has increase since the Covid-19 pandemic. Current performance in Wigan Borough is comparable to the FEMA, Greater Manchester, and England, allowing the borough to stay competitive.

Figure 27 General industrial [B2] and Storage and Distribution [B8] – market yield (%)



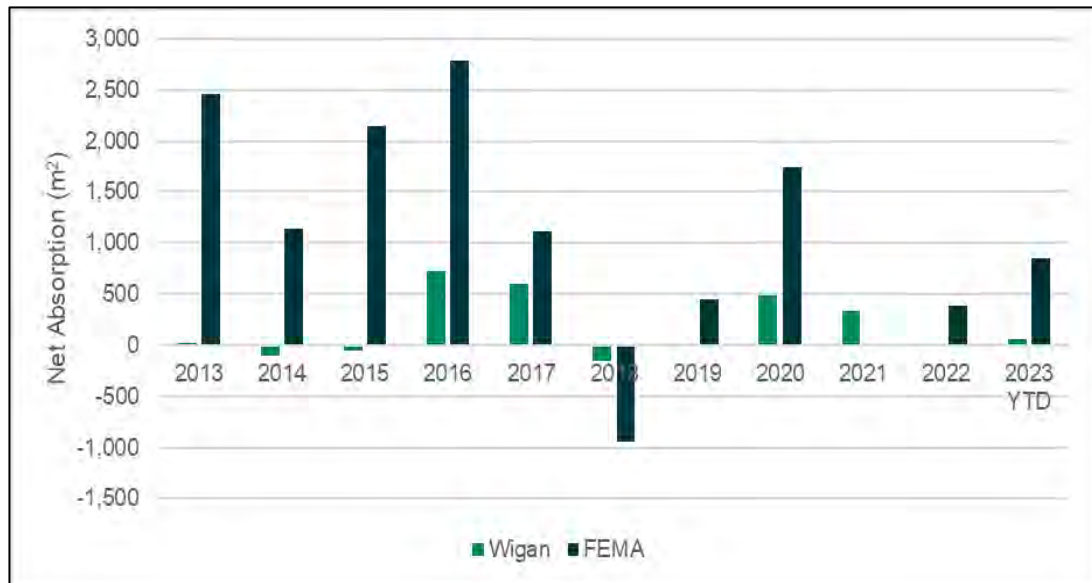
Source: CoStar 2023

6.3.21 Again, in pure financial aspects (i.e., rental value), Figure 25 shows that Wigan Borough provides general industrial and storage and distribution space which is in line with the comparator geographies in terms of affordability. Average rental values in the borough have almost doubled over the last decade, increasing by 1.36% each quarter, similar to increases in the FEMA, Greater Manchester, and England. This suggests that, from a financial point of view, although rental values have increased, affordability relative to the comparator areas has remained the same over time.

Net Absorption

- 6.3.22 As set out previously, net absorption expresses the change in the overall quantum of occupied floorspace, typically recorded year on year. Positive annual net absorption means that a greater amount of space has been occupied from a given year to the next and can indicate positive demand.
- 6.3.23 Figure 28 below presents the net absorption of light industrial floorspace for Wigan Borough and the FEMA. On the whole, net absorption in the borough has been at or near neutral between 2013 and 2023, which provides limited evidence of demand. Considering the FEMA, net absorption was positive over the majority of the past decade, however the FEMA has experienced more muted positive net absorption from 2018 onwards, indicating a slackening of demand.

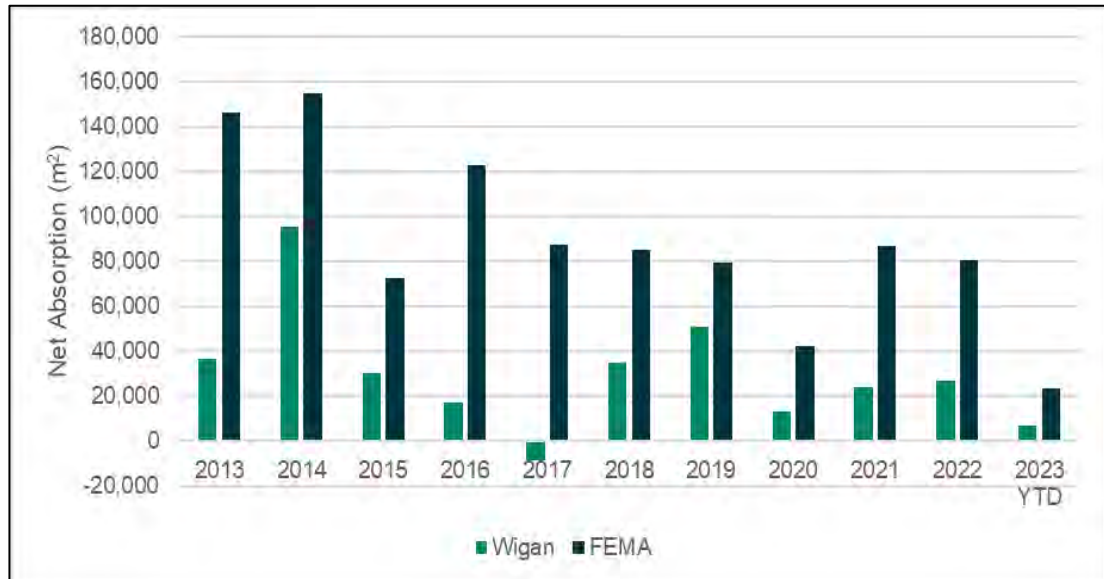
Figure 28 Net absorption of light industrial [E(g)(iii)] floorspace (2013 - 2023, m²)



Source: CoStar 2023

6.3.24 Net absorption of General Industrial and Storage and Distribution floorspace has exhibited a generally positive trend over the past decade in the borough, with 2017 the only outlier. A similar picture is evident across the FEMA, which has registered positive net absorption every year over the past decade.

Figure 29 Net absorption of general industrial [B2] and Storage and Distribution [B8] floorspace (2013 - 2023, m²)



Source: CoStar 2023

Industrial Market Conclusions

6.3.25 In conclusion, the industrial market in Wigan Borough accommodates approximately 90,000 m² of light industrial floorspace and 1,950,000 m² of general industrial and warehousing floorspace. Industrial activity is clustered in Wigan, Leigh, Hindley, and Golborne, and there are various industrial estates on the outskirts of other centres.

6.3.26 The light industrial market occupies approximately 25% space across the FEMA, being characterized by mostly small premises, and contains a notable proportion of buildings which were constructed during the 1980s. Vacancy rates for light industrial space are in line with the comparator geographies,

however market rent is well below the national average. Rents in the borough have risen steadily over the last decade whilst they have increased much faster nationally. This suggests that affordability could be increasing relatively in the borough. In addition, market yield has decreased in the borough over time, suggesting that the attractiveness for investment has improved.

- 6.3.27 General industrial and storage and distribution occupies a larger proportion of space in the FEMA at 37% and is characterized by stock that was generally constructed in the 1980s onwards. Vacancy rates are similar to the comparator geographies. Rental values are also in line with the other geographies and have been consistently over the past decade. However, there has been an increase in rental values for warehousing space in recent years according to local agents, likely due to an increase in e-commerce.

6.4 Minimum Energy Efficiency Standards

- 6.4.1 The contribution of buildings to greenhouse gas emissions is increasingly recognised. This understanding presents both challenges and opportunities, given the potential for emissions savings to be made. It is estimated that buildings are responsible for between 17% and 31%^{46,47} of national emissions.
- 6.4.2 The energy performance of buildings in the UK is monitored through the Energy Performance Certificate (EPC) system. Non-domestic private rented properties are awarded a certificate rating between A+ (most efficient) and G (least efficient). Properties awarded an A+ rating are considered to achieve Net Zero CO₂.
- 6.4.3 In order to drive the decarbonisation of the UK's non-domestic building stock, commitments have been made to encourage the construction of more energy efficient buildings and upgrading/retrofitting existing buildings through the implementation of restrictions on private lettings based on energy performance. Non-domestic buildings must comply with Minimum Energy Efficiency Standards (MEES) in order to lawfully be leased. At the time of writing (October 2023), MEES regulations apply to those non-domestic buildings which have been awarded an EPC rating of F or G, whereby these properties cannot enter into new leases until improvements have been made. A number of exemptions apply^{48,49} including that improvements must be 'permissible', 'appropriate' and 'cost effective'⁵⁰. As of 1st April 2023, MEES apply to existing leases, not solely new leases as had been the case previously⁵¹.
- 6.4.4 A breakdown of the EPC certificates awarded by use type⁵² in Wigan Borough is shown in Figure 30. The following commentary is based on the application of the relative proportion of EPC certificates, as provided by the Department for Levelling Up, Homes and Communities, to the age of building stock information derived from CoStar in order to indicate the energy performance of the building stock of Wigan. This approach allows for the indicative characterisation of the entire building stock in the borough, given that CoStar represents a robust and comprehensive dataset of building stock. However, this commentary does not take into account the stock of non-domestic buildings which are exempt from MEES regulations; the Government is engaging in further consultation on the development of a robust publicly available 'exemptions database' such that the scale of current and future exemptions can be further understood⁵³.

⁴⁶ HM Government, (2021); Net Zero Strategy: Build Back Greener.

⁴⁷ This figure includes only emissions from direct energy use in buildings.

⁴⁸ <https://www.gov.uk/energy-performance-certificate-commercial-property/exemptions>

⁴⁹ Additional exemptions to the new regulations are set out by RICS at <https://ww3.rics.org/uk/en/journals/property-journal/epc-requirements-commercial-property.html>. Exemptions apply to leases less than 6 months or greater than 99 years; to the need to perform upgrading works until a new EPC is triggered; where the costs of works would be greater than the energy saving over seven years; where third-party consent precludes works e.g. planning permission refusal where reasonably sought; where works would devalue property by over 5%; where the landlord has recently become one.

⁵⁰ RICS, (2018); Minimum Energy Efficiency Standards (MEES): Impact on UK property management and valuation.

⁵¹ <https://ww3.rics.org/uk/en/journals/property-journal/epc-requirements-commercial-property.html>

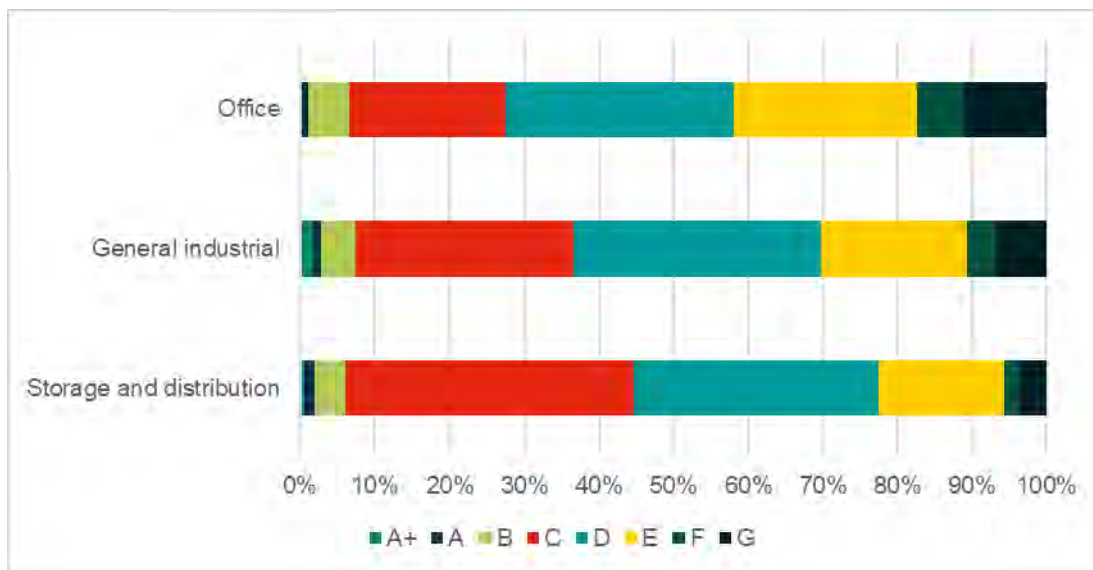
⁵² It should be noted that the use types employed by DLUHC to categorise buildings do not directly align with those categories applicable to CoStar data presented in the property market analysis section of the report. Data is therefore presented by considering the broad use types shown to comprise buildings categorised by DLUHC as follows:

- Office: 'B1 Office and Workshop Businesses' and 'Office';
- General industrial: 'B2 to B7 General Industrial and Special Industrial Groups'; and
- Storage and distribution: 'B8 Storage or distribution' and 'Warehouse and storage'.

⁵³ Department for Business, Energy and Industrial Strategy (2021). The Non-Domestic Private Rented Sector Minimum Energy Efficiency Standards: Implementation of the EPC B Future Target.

6.4.5 As shown in Figure 30, office properties generally have the lowest proportion of certificates which are MEES compliant (rated E or above). Accordingly, 17% of building certificates are not MEES compliant. If the proportion of certificates is applied to the identified office properties in the property market analysis section, recognising the limitations set out above, it would suggest that around 59 office properties do not meet MEES, possibly reflecting circa 44,900 m² of floorspace. In relation to general industrial properties, approximately 11% of building certificates are not MEES compliant. Applying the same proportion to property market information would suggest that around 34 properties do not meet MEES, or around 69,200 m² of floorspace. In relation to storage and distribution use type properties, these properties tend to have the lowest proportion of certificates which do not meet MEES (around 6% of certificates). Using the same logic of applying this proportion to the identified buildings suggests that 16 buildings are not MEES compliant, or 74,300 m² of floorspace.

Figure 30 EPC Certificates in Wigan by building use type



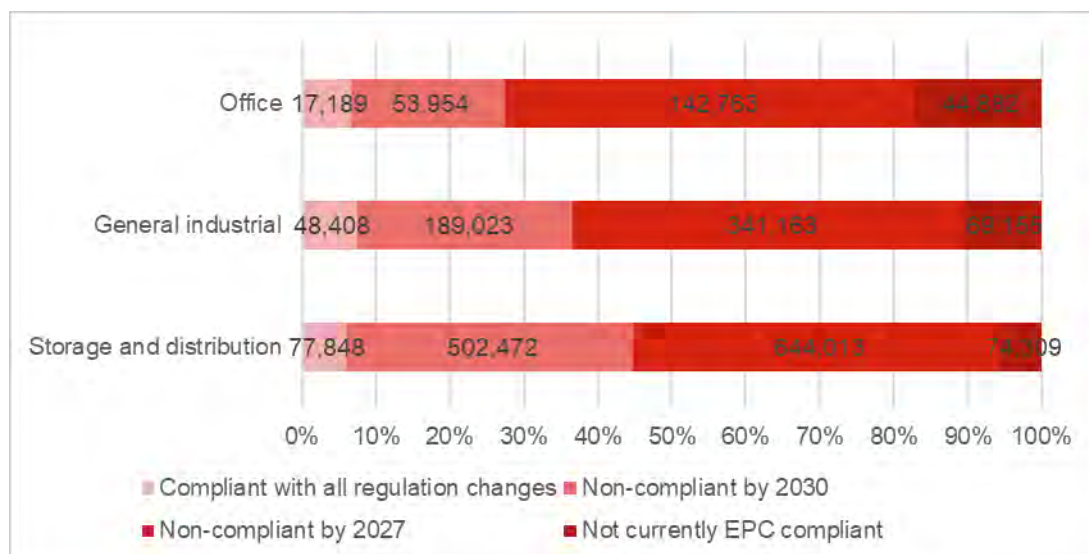
Source: Department for Levelling Up, Homes and Communities, (2023); Energy Performance of Buildings Data: England and Wales.

6.4.6 It is anticipated that the minimum standard will be sequentially increased such that building efficiency expectations are raised in line with Government ambitions to deliver against net zero commitments⁵⁴, as the minimum EPC rating for non-domestic properties to be leased will be raised to C by 1st April 2027 and to B by April 2030. Figure 31 shows the current proportion of certificates that will be non-compliant with MEES in relation to these anticipated dates for the raising of the minimum EPC rating. The proportion has been applied to property market floorspace information to indicate the applicable floorspace in these scenarios. It is clearly evident that the scale of upgrading, retrofitting, and replacing building stock such that it will comply with anticipated MEES is considerable. As set out, current and potential future exemptions may apply, nonetheless the significant proportion of buildings which are likely to not meet the correct standard presents challenges, in terms of implementation, enforcement and compliance.

6.4.7 In 2021, the Department for Business, Energy and Industrial Strategy engaged in consultation on implementation of the EPC B target by 2030 which highlighted the significant implementation issues that would need to be addressed. It is recognised nationally that the proportion of non-domestic rented stock within the scope of the regulations would increase from approximately 10% to 85% (1,000,000 buildings across England and Wales). The building stock of Wigan which falls within the scope of tightening regulations to 2030 is therefore greater than the national average, reflecting 93% of buildings.

⁵⁴ HM Government, (2020); Energy White Paper: Powering our Net Zero Future.

Figure 31 MEES compliance of present EPC certificates with anticipated regulation changes (m²)



Source: Department for Levelling Up, Homes and Communities, (2023); Energy Performance of Buildings Data: England and Wales.

6.5 Affordable Workspace

- 6.5.1 This section provides an overview of the commercial property market in Wigan Borough in the context of affordable workspace. The British Council for Offices (BCO)⁵⁵ indicates that the availability of affordable and flexible office space is vital for innovation and growth. It helps generate economic growth and jobs, by supporting entrepreneurs in the early stages of their businesses.
- 6.5.2 Various local councils have begun to think about affordable workspace and what it means for their boroughs. For example, in the London Plan, the GLA defines it as “workspace that is provided at rents maintained below the market rate for a specific social, cultural, or economic development purpose”⁵⁶. However, this is open to interpretation about what councils deem as appropriate to locally specific development and political contexts. At their core, affordable workspace policies are designed to provide financial incentives to small and medium sized businesses to take up employment premises which are otherwise priced out of the property market. These businesses are from a range of sectors, though emphasis is placed on businesses which contribute social value to the local area including from the creative and charity industries.
- 6.5.3 At a more local level, policies regarding affordable workspace are rare, but some authorities such as Bury Council have begun to consider it in plan-making. The Council discusses existing employment sites in the Bury Local Plan and notes that many sites are not of particularly high quality, however there is potential for these to provide “more affordable accommodation for local businesses that do not necessarily have the means or desire to occupy modern, high-quality accommodation”⁵⁷.
- 6.5.4 Benefits of providing affordable workspace include provision of space for community, social, educational, and creative enterprises; added character to developments; placemaking; and increased engagement and enjoyment of buildings that otherwise may have been unused. This is an emerging and growing area of policy and developers will need to consider how best to work with providers and local authorities so that the spaces are successfully integrated within the overall scheme and meet identified needs, thereby bringing benefits to all parties⁵⁸.

⁵⁵ BCO (2021). Affordable Workspace: A Solution, Not A Problem; Briefing note.

⁵⁶ Greater London Authority (2021). The London Plan.

⁵⁷ Bury Council (2018). Bury Local Plan: Topic Paper 2: Economy and Employment.

⁵⁸ Montagu Evans (2020). The Future of Affordable Local Workspace.

7. Wigan Borough's Economic Market Potential

7.1 Introduction

- 7.1.1 The Places for Everyone Plan⁵⁹ highlights that, in recent years, the northern areas of Greater Manchester have seen relatively low levels of growth overall compared to other parts of the city region, and this is forecast to continue. These northern areas have many strengths, such as their distinctive landscapes, proud communities, a strong manufacturing base and the opportunity for links to areas of economic prosperity beyond Greater Manchester, but their potential is not currently being fully realised.
- 7.1.2 This section of the report considers Wigan Borough's economic market potential. Firstly, it sets out the key sectors in Wigan Borough and their outlook; where its strengths lie and potential growth areas, considering future economic trends, that could drive economic prosperity. The section then establishes a range of influences on demand for business accommodation and what collectively the council and its partners can do in these areas to help the borough meet its potential, in line with Wigan Council's aspirations to create a more inclusive economy and a high quality place to live, work, invest and visit.

7.2 Core Sectors

Manufacturing / Advanced Manufacturing

Evidence

- 7.2.1 Although there have been continued reductions in the numbers employed in manufacturing over many decades, the Greater Manchester Industrial Strategy highlights that the sector continues to be important for the Region, delivering high levels of productivity and income⁶⁰. Wigan has a long tradition in manufacturing and to this day it is one of the largest employment sectors in the borough, accounting for 9.2% of all jobs compared with the national average of 7.7%⁶¹. The borough has a cluster of food and drink manufacturers, with 55 companies employing 3,000 workers, and is home to some of the most well-known national and international companies including Heinz, Waterfield's, AB World Foods, and Hitchens/Bakkavor⁶². In 2021, the manufacturing sector in the borough generated £927m GVA, accounting for 16.8% of total output.
- 7.2.2 Wigan & Leigh College has a long-standing history and reputation for providing excellence in engineering and manufacturing and is committed to training highly skilled engineers for the future. The College specialises in intelligent engineering including mechatronics, robotics, automation and autonomous vehicles, as well as the development and evolution of hybrid technologies⁶³. Insight from Department for Education highlights that 18.9% of all apprenticeship achievements in Wigan Borough in 2021/22 were in Engineering, behind only Health, Public Services and Care and Business, Administration and Law.

Outlook and Sector Requirements

- 7.2.3 Greater Manchester's manufacturing industry employs 110,000 people and generates £8bn of economic output each year. The manufacturing industry is being transformed by the Fourth Industrial Revolution (Industry 4.0) which is driving productivity improvements through the adoption of digital technologies, artificial intelligence and efficiency improvements⁶⁴. The Strategy sets its ambition to

⁵⁹ Greater Manchester Combined Authority (2024). Places for Everyone. Available at: <https://www.greatermanchester-ca.gov.uk/media/9565/adopted-plan-as-presented-to-council-meetings.pdf>

⁶⁰ HM Government (2019). Greater Manchester Local Industrial Strategy. Available at: <https://www.greatermanchester-ca.gov.uk/media/2132/gm-local-industrial-strategy-web.pdf>

⁶¹ Office for National Statistics (2021). Business Register and Employment Survey.

⁶² MIDAS: Invest in Manchester, Wigan. Available at: [Wigan \(investinmanchester.com\)](https://www.investinmanchester.com)

⁶³ Wigan and Leigh College: Engineering. Available at: [Wigan & Leigh College :: Explore our Facilities \(wigan-leigh.ac.uk\)](https://www.wigan-leigh.ac.uk)

⁶⁴ HM Government (2019). Greater Manchester Local Industrial Strategy. Available at: <https://www.greatermanchester-ca.gov.uk/media/2132/gm-local-industrial-strategy-web.pdf>

create high-quality manufacturing opportunities close to transport links and population centres and to strengthen the city-region's advanced materials and manufacturing clusters.

- 7.2.4 As set out in the Places for Everyone Plan, the Wigan-Bolton Growth Corridor connects residents and diverse manufacturing opportunities, fostering employment and skill development within the borough as well as across the broader Greater Manchester region. This strategic area has the potential to support employment expansion, with particular opportunities in manufacturing, predominantly in the food sector.
- 7.2.5 Recent trends in re-shoring and near-shoring could impact future demand and requirement for employment space in the borough. Many British manufacturers have begun to 're-shore' their operations to solve supply-chain issues caused by the Covid-19 pandemic and Brexit. As well as increasing resistance to economic shocks, boosting domestic supply chains will help meet the government's objectives for levelling-up and skills, given the geographic spread of the UK's biggest manufacturing centres outside London and the South East⁶⁵. There has also been a recent rise in 'near-shoring' due to the same economic and political pressures, with Savills reporting that the demand for factory space in Europe has risen by 29%. Benefits of re- and near-shoring include helping businesses to achieve decarbonisation through reduced transport costs, alignment with companies' environment, sustainability, and governance (ESG), and social value goals⁶⁶.
- 7.2.6 In terms of sector requirements, as the manufacturing industry evolves with technological advancements, upskilling and reskilling of the existing workforce is essential alongside ensuring access to sufficient industrial and warehousing capacity – with estimates suggesting that every £1 billion of UK manufacturing investment, will require an additional 175,000 ft² of warehouse space⁶⁷. These two factors are interconnected, as availability of appropriate industrial and warehousing spaces can attract businesses that require a skilled workforce and in turn, a skilled workforce can attract advanced manufacturing companies. For Wigan Borough, strategic planning that focuses on creating a conducive environment for advanced manufacturing, including the development of industrial and warehousing infrastructure and initiatives for upskilling and reskilling, can contribute significantly to the sector's success and long-term sustainability.
- 7.2.7 Consultation highlighted that key site attributes for manufacturing companies will vary by size or type of activity. However, in general, companies will require sites accessible to strategic roads and, in some cases, rail links whilst ensuring proximity (in time) to raw materials, labour and, critically, power⁶⁸. Similar to the logistics sector, the availability of sites of a suitable size to meet current operations and future growth requirements was highlighted, as well as modern floorspace to align with companies' ESG requirements and comply with Minimum Energy Efficiency Standards (MEES).

Transport and Logistics

Evidence

- 7.2.8 Wigan Borough has good access to the entire UK through a comprehensive road network spanning north, south, east, and west. The borough is the only local authority in Greater Manchester to have the M6 Corridor running through it, being a major business asset as one of the most important strategic routes for freight movement between the north and south of the country. The borough is also well positioned within the national motorway network including the M61, M60, M62 and M58. The rail connections include frequent and direct trains to London (2-hour travel time) and quick access to Manchester (4 trains per hour taking between 38-45 minutes) and Liverpool (3 trains per hour taking between 32-50 minutes). Wigan's strategic location is advantageous for businesses being near both Manchester Airport and Liverpool John Lennon Airport, connecting the region to international destinations. The borough also offers convenient entry to the Port of Liverpool and the Manchester Ship Canal, which move over 40 million tonnes of cargo and accommodate 15,000 ship movements annually, making Wigan Borough an ideal distribution centre for global businesses.

⁶⁵ Financial Times (2022). UK manufacturers 'reshore' supply chains after pandemic and Brexit.

⁶⁶ Financial Times (2023). Demand for Europe factory space rises 29% amid 'nearshoring' rush.

⁶⁷ <https://www.savills.co.uk/insight-and-opinion/savills-news/305862-0/increase-in-uk-manufacturing-investment-set-to-cause-ripple-effect-on-warehouse-demand>

⁶⁸ <https://www.turley.co.uk/comment/advanced-manufacturing-plan-uk-government>

- 7.2.9 Owing to its location and proximity to key transport infrastructure, the transport and logistics sector⁶⁹ accounts for 3,380 workers across 445 businesses in the borough. The Greater Manchester Industrial Strategy⁷⁰ recognises the Wigan-Bolton corridor as a driver of growth as it holds substantial importance in enhancing competitiveness and employment in the North West via its existing strengths and strategic transportation connections, and is specifically suited for logistics and industrial purposes. Demand for employment within the corridor is evidenced by the success of previous developments, such as Logistics North, located off Junction 4 of the M61 in Bolton, which offers 3 million ft² (~280,000m²) of Grade A logistics and manufacturing space with 5,500 people employed on-site⁷¹.

Outlook and Sector Requirements

- 7.2.10 The transport and logistics sector is gaining greater importance in the economy, driving efficiency in manufacturing and retail while responding to shifts in consumer behaviour, owing to increased internet shopping, levels of home working and demands for same or next day deliveries⁷². Despite a recent softening in the sectoral outlook in the North West, with the latest Savills' Big Shed Briefing⁷³ highlighting an increasing availability and falling take-up year on year, vacancy rates remain low compared with pre-Covid levels. Logistics rental growth forecasts from 2024-2028 highlight the North West as having the largest rental growth of any UK region. Furthermore, long-term forecasts at the national level highlight that industrial and logistics currently generates £232 billion of GVA and that the sector is set to register a 29% increase in output between 2025 and 2039.⁷⁴
- 7.2.11 Wigan's strategic position, freight links and road infrastructure offer prospects for advancing logistics in the borough. The Places for Everyone Plan⁷⁵ highlights that the borough has the potential to take advantage of its strategic location within the national motorway network and thus reinforcing the importance of delivering strategic highway improvements. Similarly, the Plan recognises the demand and requirement for large scale logistics development within the M6 Corridor, yet it suggests that the borough currently does not have the sites to attract this demand, with Junction 25 of the M6 having the potential to deliver 140,000 m² of B2 and B8 employment floorspace, thereby presenting a major opportunity to provide a high quality location for substantial employment development in the M6 corridor. The Plan suggests that an all-ways junction on Junction 25 of the M6 would also enhance the economic profile of Wigan Borough whilst taking full advantage of its strategic location. Feedback from agents highlighted that the current road infrastructure exacerbates viability issues as only southbound traffic can access the M6 at Junction 25.
- 7.2.12 Feedback from agents indicated that occupiers are increasingly demanding high quality (Grade A) industrial and warehousing floorspace, with the availability of expansion space, public realm and access to amenities on or in proximity to sites also a key consideration. A number also highlighted the need for sufficient eaves height, with older stock often not meeting this criterion and rendering it difficult to market, which could present opportunities for redevelopment. Drivers around environmental, social, and corporate governance (ESG) and decarbonisation have also raised demand for Electric Vehicle charging and green refuelling, which are driving demand for land and require sufficient supporting infrastructure.
- 7.2.13 The Places for Everyone Plan suggests that development for logistics purposes should complement high quality business premises for a range of other sectors including advanced manufacturing and higher value, knowledge-based businesses. Through this approach, industrial and warehousing development has the potential to support high-value jobs and premises for new and growing sectors, thus diversifying both the local and sub-regional economy.

⁶⁹ SIC code definition taken from Logistics UK - <https://logistics.org.uk/CMSPages/GetFile.aspx?guid=d3e3d23c-2dca-4b0a-8406-0d126c71eb4d&lang=en-GB>

⁷⁰ HM Government (2019). Greater Manchester Local Industrial Strategy. Available at: <https://www.greatermanchester-ca.gov.uk/media/2132/gm-local-industrial-strategy-web.pdf>

⁷¹ Greater Manchester Combined Authority (2024). Places for Everyone. Available at: <https://www.greatermanchester-ca.gov.uk/media/4838/places-for-everyone.pdf>

⁷² Greater Manchester Combined Authority (2024). Places for Everyone. Available at: <https://www.greatermanchester-ca.gov.uk/media/4838/places-for-everyone.pdf>

⁷³ <https://pdf.savills.com/documents/Big-Shed-Briefing-January-2024.pdf>

⁷⁴ Savills (2022). Levelling Up – The Logic of Logistics.

⁷⁵ <https://www.greatermanchester-ca.gov.uk/media/4838/places-for-everyone.pdf>

Construction

Evidence

- 7.2.14 In 2021, the construction sector in Wigan Borough accounted for 10.2% of all employment, higher than the average for the FEMA, Greater Manchester, and England on average. The construction sector in Wigan Borough saw employment increase by 83% between 2016 and 2021, again higher than the average growth across the FEMA (61%), Greater Manchester (52%), and England (11%)⁷⁶. Furthermore, the number of construction enterprises in the borough accounted for 18.4% of the business base in 2022, higher than the average in the FEMA (13.8%) and Greater Manchester (12%)⁷⁷. The vast majority (93.7%) of construction businesses in the borough are microbusinesses of 0-9 employees⁷⁸.
- 7.2.15 The Department for Education's insights on Education and Training Aim Enrolments and Achievements reveal that in the 2020/21 academic year, 6% of achievements in over 19-year-olds in Wigan Borough were in the construction sector, and 82% of education and training aims were successfully accomplished⁷⁹. Similarly, 12.2% of all apprenticeship achievements in the borough in the 2021/22 academic year were in the construction sector⁸⁰.
- 7.2.16 Wigan Borough offers educational and training facilities that are actively contributing to the strength of the construction sector locally. The following facilities are key assets in meeting the demands of the growing construction industry and fostering a skilled workforce:
- Wigan & Leigh College – The Centre for Engineering and Construction offers various construction courses with experienced tutors and extensive links with local and national employers offering opportunities for high quality work experience⁸¹. Construction is one of the main specialisms of the College.
 - Wigan Training Centre – The new training centre at Pennyhurst Mill on Haig Street in Wigan is part of the Growth Company Education and Skills. It offers tailored programmes designed around the needs of learners to support them to achieve a nationally recognised qualification, offering individual learning plans with dedicated guidance and support. Construction is amongst many courses offered at the Centre⁸².

Outlook and Sector Requirements

- 7.2.17 According to the Construction Industry Training Board (CITB), an extra 25,400 construction workers will be needed in the North West to satisfy demand from 2023 to 2027, with the volume of construction work set to increase by 1.1% per annum. The biggest gains in output, which currently stands at £19bn across the region, are set to come from the non-housing Repair and Maintenance (+£348m), private housing (+£282m) and commercial (+£264m) sectors, accounting for 80% of the total output increase in the region between 2023 and 2027. At a more local level, occupational growth forecasts by Oxford Economics in 2019 suggest Skilled Construction and Building Trade occupations in Wigan Borough are expected to grow by 5% between 2020 and 2035⁸³.
- 7.2.18 The Construction Skills Network reports that looking forward, the construction workforce will need to be trained in green and modern construction methods to take advantage of the future opportunities and ensure the North West has the volume of energy efficient homes it needs, the infrastructure to ensure the economy thrives, and to tackle the retrofit of the built environment to meet net zero targets. More locally, the Greater Manchester Retrofit Taskforce has found there is likely to be a requirement for up to 8,000 additional construction workers over the next five years if existing retrofit trends continue – and they will require additional specialist training in green skills⁸⁴. Taking advantage of the

⁷⁶ Office for National Statistics (2021). Business Register and Employment Survey

⁷⁷ Enterprises by industry and employment size band (2018-2022).

⁷⁸ Office for National Statistics (2023) UK Business Counts

⁷⁹ DfE: Adult (19+) Education and Training aim enrolments and achievements English devolved area breakdown, Academic Year 2020/21

⁸⁰ <https://explore-education-statistics.service.gov.uk/find-statistics/apprenticeships-and-traineeships/2021-22>

⁸¹ Wigan & Leigh College: Courses. Available at: [Wigan & Leigh College: Construction Crafts \(wigan-leigh.ac.uk\)](http://wigan-leigh.ac.uk)

⁸² The Growth Company, Official Launch of new Wigan Training Centre, May 2023. Available at: [The Growth Company | Official launch of new Wigan Training Centre](https://www.growthcompany.co.uk/news/the-growth-company-official-launch-of-new-wigan-training-centre)

⁸³ Local Skills Report & Labour Market Plan, Sector Overviews, Data Annexes and References, Version 2, March 2022

⁸⁴ Greater Manchester Independent Prosperity Review, Evidence Update Reflections, October 2022. Available at: [gmpir-evidence-update-reflections-report-digital-version.pdf \(greatermanchester-ca.gov.uk\)](https://www.gmpir-evidence-update-reflections-report-digital-version.pdf)

borough's current strengths and forecast growth of the construction industry, upskilling the sector via training and education will ensure that the local workforce is equipped with the necessary skills and knowledge to effectively implement and manage modern construction techniques and capitalise on the sector's outlook.

- 7.2.19 The construction sector comprises a wide range of products, services and technologies. These are likely to vary in terms of the economic value they generate, reflecting differences in their use of particular factors of production (raw materials, physical capital, intangible investment, skilled and non-skilled labour and knowledge) and the value which they generate from them. The sector can broadly be broken down into three constituent elements: (i) construction contracting industry; (ii) provision of construction related professional services; and (iii) construction related products and materials⁸⁵.
- 7.2.20 Construction contractors and those involved in some services activities, such as the renting and leasing of equipment, often establish a physical presence near construction projects. This proximity offers logistical advantages by reducing transportation costs and enabling quick responses. It allows for regular site visits by project managers and supervisors, promoting effective communication and problem solving. Being close to the development project fosters collaboration and networking opportunities with the stakeholders while gaining local knowledge on regulations, labour markets and suppliers. Some larger contractors may have multiple offices to cater to different regional markets while maintaining a central headquarters, for instance Tilbury Douglas has its North West Regional Office in Wigan.
- 7.2.21 In relation to businesses providing services in relation to the construction sector, such as architectural and quantity surveying activities, locational drivers are likely to align with those of the professional and business services for E(g)(i) uses, in relation to access to skilled labour, connectivity via public transport and road (both to the office location and areas of activity) and sufficient quality office space to attract staff and meet ESG considerations.
- 7.2.22 While proximity and connectivity to regional markets remains a consideration for those involved in the manufacture of construction related products and materials, key locational drivers include the availability of (or access to) raw materials and sufficient space to support manufacturing activities and the storage of materials/products. Moreover, owing to the nature of activities, which can generate noise and other negative externalities, including related to need for 24 hour access, sites that are not in proximity to sensitive uses (e.g. residential properties) are often favoured.
- 7.2.23 It is important to consider the amount of space available for businesses within the construction sector given wider drivers around net zero and decarbonisation. Given the scale of retrofitting likely to be required within the borough and the surrounding area in the coming years and low vacancy rates among industrial premises, there may be an opportunity for businesses in this sector to capture demand whether it be in activities or in the supply chain.
- 7.2.24 In terms of space requirements, the types of premises that businesses such as insulation services or heat pump suppliers require is likely to be similar to those in the construction trades. Specifically, these businesses will need to be close or accessible to their customers. Whilst premises requirements will not be bespoke in the main, with typical modern premises likely being suitable, occupiers will likely require sufficient yard space to ensure their effective operation. These businesses will also seek to operate out of cost-effective premises.

Health and Social Care

Evidence

- 7.2.25 Wigan Borough's Health and Social Care sector has an established profile with potential for growth as a defining force in the borough's economic landscape. As previously set out, the largest employment sector in Wigan is Health and Social Care, employing 15.6% of workers, representing a greater share than in the FEMA (13.8%), Greater Manchester (13.0%) and England (13.1%)⁸⁶. This is linked to the presence of the Royal Albert Edward Infirmary in Wigan, as well as wider facilities such as Wrightington Hospital, Leigh Infirmary and the Thomas Linacre Centre.

⁸⁵ Department For Business, Innovation and Skills UK Construction an Economic Analysis of the Sector July 2013

⁸⁶ Office for National Statistics (2021). Business Register and Employment Survey.

- 7.2.26 Insight from the Department for Education indicates that 22.4% of apprenticeship achievements in the borough in 2021/22 were in Health, Public Services and Care and that Health, Public Services and Care apprenticeships registered the highest number of enrolments (860) in the same year. Similarly, of all adult education achievements by individuals over 19 years old in the borough, 21% were in the Health, Public Services, and Care sector⁸⁷.
- 7.2.27 Wigan Borough is home to several training and educational facilities, ensuring the dedication and potential to cultivating a skilled workforce that can effectively meet the sector's expanding needs:
- 7.2.28 Wigan & Leigh College has established the Centre of Excellence in Health and Social Care, committed to offering exceptional training programs for aspiring nurses and healthcare practitioners in the region. The new clinical skills centre addresses sector requirements by providing a realistic training environment to enhance students' technical skills and knowledge, complete with ward environment and equipment used in the health sector⁸⁸. Furthermore, Wigan & Leigh College, Edge Hill University, Wigan Council and Wrightington, Wigan and Leigh Teaching Hospitals NHS Foundation Trust (WWL) have an established partnership aimed at improving local opportunities to develop people's skills and employment in the future, with a focus on boosting education, health and economic prospects for the borough. This has been further strengthened through a Civic Agreement which has been signed, reaffirming the commitment to improving the lives of those living in the borough.
- 7.2.29 The Wigan-Bolton Growth Corridor is identified as an important location in delivering significant benefit and major contribution to raising competitiveness of the northern areas, and specifically offers substantial prospects for health innovation through the implementation of the Greater Manchester Health Innovation Campus, which is to be connected with the Royal Bolton Hospital⁸⁹.
- 7.2.30 The new training centre at Pennyhurst Mill in Wigan, part of the Growth Company Education and Skills, offers tailored programmes designed around the needs of learners to support them to achieve a nationally recognised qualification, offering individual learning plans with dedicated guidance and support. Health, adult, and childcare is amongst many courses offered at the Centre⁹⁰.

Outlook and Sector Requirements

- 7.2.31 According to Health Education England, there exists a substantial demand for health workers, with a specific focus on professions such as nurses, therapists, midwives and paramedics. To accommodate the needs of an expanding and ageing populace, the NHS is tasked with recruiting an additional 190,000 personnel by 2027⁹¹. Salaries for entry-level paramedics and nurses span from £22,000 to £29,000. As professionals accumulate experience and ascend in rank, their remuneration escalates, ranging from £31,000 to £69,000 – demonstrating the potential for higher value employment in the sector.
- 7.2.32 Analysis suggests that demand for employment in the health sector is likely to feed through in Wigan Borough, as the ageing population creates greater need for health workers⁹². Occupational growth forecasts by Oxford Economics in 2019 suggest Health Professional occupations in the borough are expected to grow by 6% between 2020 and 2035. Similarly, Health and Social Welfare professionals are anticipated to rise by 3% during this period⁹³.
- 7.2.33 Health and Social Care as a growth area correlates Greater Manchester's ambitions in health and health innovation. The health sector – especially health innovation – has been identified by the Local Industrial Strategy as offering strong growth potential for Greater Manchester as a whole⁹⁴.

⁸⁷ DfE: Adult (19+) Education and Training aim enrolments and achievements English devolved area breakdown, Academic Year 2020/21

⁸⁸ Wigan and Leigh College: Health and Social Care. Available at: [Health and Social Care, Wigan and Leigh College \(wigan-leigh.ac.uk\)](https://www.wigan-leigh.ac.uk)

⁸⁹ GMCA, Report to GM LEP, GM Growth Locations, November 2021. Available at: [GMCA Part A Report Template \(greatermanchester-ca.gov.uk\)](https://www.greatermanchester-ca.gov.uk)

⁹⁰ The Growth Company, Official Launch of new Wigan Training Centre, May 2023. Available at: [The Growth Company | Official launch of new Wigan Training Centre](https://www.thegrowthcompany.com)

⁹¹ Wigan and Leigh College: Health and Social Care. Available at: [Health and Social Care, Wigan and Leigh College \(wigan-leigh.ac.uk\)](https://www.wigan-leigh.ac.uk)

⁹² Wigan Council: Leigh Market Demand Study, Cushman and Wakefield & Hatch, September 2022

⁹³ Local Skills Report & Labour Market Plan, Sector Overviews, Data Annexes and References, Version 2, March 2022

⁹⁴ HM Government (2019). Greater Manchester Local Industrial Strategy. Available at: <https://www.greatermanchester-ca.gov.uk/media/2132/gm-local-industrial-strategy-web.pdf>

- 7.2.34 In the context of this EMELA, it should be noted that, while a key sector for the local economy, the Health and Social Care sector does not directly drive significant demand for B/E use class floorspace (with hospitals and care homes falling under use class C). However, the Health and Social Care sector does drive indirect demand for employment land uses, for instance, requirements for warehousing and storage (B8), the manufacturing of medical supplies and equipment (B2/E(g)(iii)); the research and development of new products and processes (E(g)(ii)), as well as professional services/administration and support services (E(g)(i)).

7.3 Cross-cutting Sectors

- 7.3.1 The cross-cutting sectors are not areas in which Wigan Borough has a demonstrable comparative advantage or strength; rather they are key sectors that are likely to have a considerable impact on the future of the borough's key sectors, namely manufacturing, logistics and distribution, construction and health and social care.

Digital

Evidence

- 7.3.2 As set out in the UK's Digital Strategy, the UK's economic future, jobs, wage levels, prosperity, national security, cost of living, productivity, ability to compete globally and our geo-political standing in the world are all reliant on continued and growing success in digital technology.
- 7.3.3 Wigan Borough is home to 460 businesses across the digital sector⁹⁵, employing 1,785 staff⁹⁶. Among the existing spaces, Wigan Hall has transformed into a hub for digital businesses, and The Old Courts are a recognised establishment for supporting digital, creative, arts and culture events and activities. Future proposals seek to develop existing buildings such as the Civic Centre within the council's ownership, which will be repurposed to create start up space with fast broadband connection in the digital, technology, arts, and cultural sectors. Similarly, Wigan Council's Digital Strategy⁹⁷ aims to create Innovation/ Entrepreneurial Hubs across the borough. These hubs will play a pivotal role in facilitating and fostering Incubation Space for Businesses, providing avenues for innovation in the digital technology sector, ensuring universal access to skills and training, promoting collaborative workspace and shared learning, and nurturing digital growth while offering business support and guidance.
- 7.3.4 Educational and training facilities in the borough include the Growth Company Education and Skills new Training Centre, which offers various digital and creative courses⁹⁸. Wigan and Leigh College also has established digital and creative training and skills programmes available to students⁹⁹. In addition, Winstanley College recently achieved a CyberFirst Award from the National Cyber Security Centre. The award recognises the commitment of the college to cyber security education and will allow the college to improve links with industry partners for students¹⁰⁰. Cyber Security is vital for the resilience of Wigan Borough's economy, with 4 in 10 businesses nationally having suffered a cyber breach or attack in 2022¹⁰¹.

Outlook and Sector Requirements

- 7.3.5 The importance of the digital sector has been heightened by the Covid-19 pandemic, shifting working patterns and growth aspirations. Indeed, estimates commissioned by the government suggest that supporting and strengthening the digital economy could grow the UK's annual gross value added (GVA) by an additional £41.5 billion by 2025, and create a further 678,000 jobs. More locally, Greater

⁹⁵ ONS Business Counts 2022; Definition of the Digital Sector taken from DCMS Digital Sector Economic Estimates 2016, available at https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/503666/Digital_Sector_Economic_Estimates_-_January_2016_Revised.pdf

⁹⁶ ONS BRES 2021

⁹⁷ Wigan Digital Strategy, 2021 – 2025. Available at: [Digital Strategy \(wigan.gov.uk\)](https://www.wigan.gov.uk/digital-strategy)

⁹⁸ The Growth Company, Official Launch of new Wigan Training Centre, May 2023. Available at: [The Growth Company | Official launch of new Wigan Training Centre](https://www.growthcompany.co.uk/news/the-growth-company-official-launch-of-new-wigan-training-centre)

⁹⁹ Wigan & Leigh College: Health and Social Care. Available at: [Health and Social Care, Wigan and Leigh College \(wigan-leigh.ac.uk\)](https://www.wigan-leigh.ac.uk/health-social-care)

¹⁰⁰ Winstanley College (2023). Winstanley College Recognised by CyberFirst Scheme.

¹⁰¹ <https://www.gov.uk/government/statistics/cyber-security-breaches-survey-2022>

Manchester policy including the Local Industrial Strategy¹⁰², Greater Manchester Digital Blueprint¹⁰³, Local Skills Report¹⁰⁴ and the Strategy for Culture and Creativity¹⁰⁵, have also highlighted the key role of the digital sector in driving growth across Greater Manchester.

- 7.3.6 Growth in the digital economy has the potential to drive requirements for office space, with CBRE¹⁰⁶ highlighting the tech sector's adoption of flexible space with access to shared amenities, which offer agility and cost effectiveness. Furthermore, the trajectory of industries towards digitisation and technological progress has implications for Wigan Borough's key sectors, outlined above. For instance, the Greater Manchester Strategy highlights that digital transformation will be an essential step in preparing for a fully integrated, digital health and care system. The technological changes associated with the 4th Industrial Revolution will see increased digitalisation and application of artificial intelligence, big data, data science and data analytics, and robotics across the manufacturing and logistics sectors. This could have implications for manufacturing and warehousing floorspace, with technologies having the potential to increase productivity and the efficiency of space utilisation, as well as driving demand for smart warehouses in proximity to urban centres¹⁰⁷, linked to transport decarbonisation, increased micro-mobility and the need for local sourcing.

Net Zero and Decarbonisation

Evidence

- 7.3.7 In June 2019, with the Climate Change Act 2008 (2050 Target Amendment) Order 2019, the Government committed to a 100% reduction of greenhouse gas emissions by 2050 compared with 1990 levels. This is referred to as the net zero target. In order to meet the UK's Net Zero commitments, there will be a requirement for the transformation of every sector of the global economy. It means no longer burning fossil fuels for power or heating; it means new ways of making concrete, cement, steel; it means the end of the petrol and diesel engine.
- 7.3.8 Net zero therefore has key implications for the UK's economy and is a likely driver of inward investment. Indeed, the UK's Net Zero Strategy highlights that the UK attracted over £5.8 billion of new inward investment in just over ten months since it launched its Ten Point Plan in 2020, and the Net Zero Strategy is expected to leverage up to £90 billion of private investment by 2030.

Outlook and Sector Requirements

- 7.3.9 The Economy 2030 Inquiry¹⁰⁸ has reported the number of additional workers required in specific sectors for the country to achieve net zero status:
- Power: 260,000 energy jobs are needed between now and 2050. Such jobs will require skills in both smart and traditional networks engineering. The government is planning to mobilise additional public and private investment of £150-270 billion across the Power sector, in line with its 2037 delivery pathway¹⁰⁹.
 - Buildings retrofit: 230,000 jobs needed by 2030 to improve building fabric, energy efficiency and the integration of low carbon systems such as heat pumps.
 - Smart systems technologies: The domestic market for smart systems and flexibility solutions could support 10,000 jobs by 2050.
- 7.3.10 It also suggests that many sectors will need to undergo significant transformations in the transition to Net Zero:
- Automotive: Jobs in automotive and electric vehicle battery sector could grow by 29% by 2040.

¹⁰² HM Government (2019). Greater Manchester Local Industrial Strategy. Available at: <https://www.greatermanchester-ca.gov.uk/media/2132/gm-local-industrial-strategy-web.pdf>

¹⁰³ Greater Manchester Digital Blueprint, January 2020. Available at: [PowerPoint Presentation \(greatermanchester-ca.gov.uk\)](https://www.greatermanchester-ca.gov.uk/powerpoint-presentation-greatermanchester-ca-gov-uk)

¹⁰⁴ Local Skills Report & Labour Market Plan, Greater Manchester Employment & Skills Advisory Panel, March 2022. Available at: [gm-esap-local-skills-report-update-march-2022-final.pdf \(greatermanchester-ca.gov.uk\)](https://www.greatermanchester-ca.gov.uk/gm-esap-local-skills-report-update-march-2022-final.pdf)

¹⁰⁵ Greater Manchester's Strategy for Culture And Creativity, n.d. Available at: [strategy.pdf \(greatermanchester-ca.gov.uk\)](https://www.greatermanchester-ca.gov.uk/strategy.pdf)

¹⁰⁶ <https://www.cbre.co.uk/insights/reports/flexible-office-trends-in-tech-2022>

¹⁰⁷ <https://www.knightfrank.com/research/article/2021-10-21-tech-solutions-enabling-better-use-of-small-urban-spaces>

¹⁰⁸ The Economy 2030 Inquiry (2022). Net Zero Jobs: The impact of the transition to net zero on the UK labour market.

¹⁰⁹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1033990/net-zero-strategy-beis.pdf

- Circular economy: Up to 102,000 jobs needed in repair, re-manufacture, and refill sectors by 2030.

7.3.11 The scale of investment and job creation associated with net zero and decarbonisation across the UK economy has the potential to open up opportunities for growth and inward investment in Wigan Borough. As noted by McKinsey, three sector groups – power, mobility and buildings – are due to account for approximately 75% of the total spending on physical assets under certain net zero scenarios¹¹⁰. This has potential implications for space requirements in Wigan Borough:

- Power – the scale of investment suggests the potential for more land to be needed to support electricity infrastructure and substations in order to achieve the decarbonisation of homes and workplaces.
- Mobility – land requirements to support the electrification of UK vehicles and their supply chains, and the industrialisation of zero emission vehicle technologies, whilst EV charging and green refuelling are driving demand for land across the industrial and logistics industries and require sufficient supporting infrastructure.
- Buildings – with 230,000 jobs needed across the UK by 2030 and forecast public and private investment of approximately £200 billion by 2037, the decarbonisation of buildings will require additional land to support construction businesses and their supply chains, with storage/yard space a key requirement as set out earlier within this section.

7.3.12 Furthermore, net zero and decarbonisation are key factors that inform companies' ESG commitments, which have been key drivers in trends around near and re-shoring of manufacturing activities and more sustainable/multi-modal freight facilities, which may result in increased demand for sites and premises in Wigan Borough.

Health Innovation and Life Science

Evidence

7.3.13 North West England is a thriving cluster for the Health Innovation and Life Sciences sector, generating £13.4 billion in turnover in 2021/2022¹¹¹. 14.2% (12,750 jobs) of England's total employment in the sector is in the North-West, with Greater Manchester alone supporting 2,075 jobs¹¹². On a larger scale, the Northern Powerhouse consisting of the North-West, Yorkshire and the Humber and the North-East contains 1,000 life and health science businesses, supporting approximately 38,000 jobs¹¹³.

7.3.14 Wigan Borough's Health Innovation and Life Sciences sector is currently limited with only 145 people employed in the sector¹¹⁴. However, its strategic location between Liverpool and Manchester, and connectivity it offers between both cities, opens up access to a talent pool of skilled-workers and the potential to capitalise on the future opportunities in the sector. In Greater Manchester alone, there are four universities with main campuses (University of Manchester, Manchester Metropolitan University, University of Salford and University of Bolton) with over 96,000 students¹¹⁵. Universities in Liverpool also provide Wigan with an accessible labour pool, with institutions like the University of Liverpool, Liverpool John Moores University and Liverpool Hope University all within the city. Other universities within a relatively accessible distance also include Edge Hill University in Ormskirk, the University of Central Lancashire in Preston and the University of Lancaster.

7.3.15 The North-West is home to a multitude of Health Innovation and Life Science assets:

- Alderley Park, Cheshire is the UK's largest single site life science campus with over 250 businesses on the campus and over 1 million sq. Ft of lab space.¹¹⁶ The campus is a major driver of ground-breaking research and supports thousands of jobs.

¹¹⁰ <https://www.mckinsey.com/capabilities/sustainability/our-insights/the-economic-transformation-what-would-change-in-the-net-zero-transition>

¹¹¹ UK Government (2024). Bioscience and health technology sector statistics 2021 to 2022

¹¹² Office for National Statistics (2023). Business Register and Employment Survey.

¹¹³ Northern Health Science Alliance (2016). OVER 1,000 LIFE SCIENCES COMPANIES DRIVING £10BN INTO NORTHERN POWERHOUSE.

¹¹⁴ The Life Science Sector consists of SIC codes 21100, 21200, 26600, 32500 and 72110 (UK Government (2022). Bioscience and health technology sector statistics 2020 – user guide.

¹¹⁵ HM Government (2019). Greater Manchester Local Industrial Strategy.

¹¹⁶ Alderley Park (2024). <https://www.alderleypark.co.uk/>.

- Manchester Science Park is a highly established life science community of over 150 businesses in Manchester¹¹⁷. The park offers a range of modern office and laboratory spaces tailored to the needs of life sciences, collaborating closely with the University of Manchester and other academic institutions to provide the labour pool necessary to supply the sector.
- The Manchester Institute for Collaborative Research on Ageing (MICRA) contains over 300 researchers, international experts, and 60+ research projects and programmes spanning humanities, biology, medicine and health, and science and engineering¹¹⁸. The MICRA plays a critical role in advancing research, policy, and practice in the field of ageing through interdisciplinary collaboration.

Outlook and Sector Requirements

- 7.3.16 By 2036, Greater Manchester will see a 75% increase in the proportion of the population who are 75 and over compared to 2011¹¹⁹. The demographic shift towards an ageing population necessitates innovative solutions to address age-related health challenges, thereby supporting activity in the Health Innovation and Life Sciences sector. As the UK's first World Health Organisation Age Friendly city-region, Greater Manchester has already taken charge of capitalising on this opportunity. The Department for International Trade (DIT) is also to promote the combined regions encompassing Greater Manchester and Cheshire and Warrington to High Potential Opportunity (HPO) status in life sciences¹²⁰, showcasing the high growth potential of the industry in the North West.
- 7.3.17 CBRE concluded in their 2022 laboratory supply and demand study that in the Liverpool and Manchester city regions the 'current lack of appropriate space types and facilities represents a potential limit to the region's economy'. Wigan Borough's close proximity and connectivity to the life science industries in Liverpool and Manchester, access to a large pool of highly skilled workers from the multiple nearby universities¹²¹, as well as low rents make it a potential location for new life science businesses to establish themselves.
- 7.3.18 Health Innovation and Life Science businesses gain from certain locational characteristics. One key characteristic is access to a skilled labour supply, while clustering is also key for businesses to integrate into the supply chain, therefore proximity to other life science businesses as well as life science institutions is key to attracting firms. Scalability is another factor to consider; businesses need to be able to scale up quickly to respond to market changes, thus facility size and adjacent land are factors businesses will account for. Flexibility is another driver; the process of manufacturing life science products requires is highly diverse, therefore sites with multiple approved uses are attractive to firms¹²².

7.4 Influences on Demand

- 7.4.1 The analysis and consultation undertaken has highlighted a range of wider factors that are potential determinants of site selection or investment in sites and premises across the borough. This section considers these influences on demand and what, collectively, Wigan Council and its partners can do in these areas to help the borough meet its potential, in line with the council's aspirations to create a more inclusive economy and a high quality place to live, work, invest and visit.

Infrastructure

- 7.4.2 The correlation between the quality of infrastructure and investment projects is a direct one, with locations with high-quality infrastructure attracting much higher levels of investment compared with those with low-quality infrastructure¹²³.
- 7.4.3 Transport connectivity is a key determinant of investment, with access to staff, customers and the supply chain key considerations for businesses across production and services sectors. This not only relates to transport infrastructure itself, but also reliability, with congestion having the potential to make

¹¹⁷ Bruntwood (2024). <https://bruntwood.co.uk/our-locations/manchester/manchester-science-park/>

¹¹⁸ HM Government (2019). Greater Manchester Local Industrial Strategy.

¹¹⁹ HM Government (2019). Greater Manchester Local Industrial Strategy.

¹²⁰ Health Innovation Manchester (2021). Department for International Trade to promote North West Life Science Cluster as High Potential opportunity for health innovation for healthy ageing.

¹²¹ CBRE (2022). Lab Supply and Demand Study- Liverpool City Region.

¹²² JLL. 6 considerations for finding life sciences manufacturing space.

¹²³ <https://www.investmentmonitor.ai/sectors/infrastructure/fdi-drivers-infrastructure-and-the-rise-of-digital/?cf-view>

travel inefficient for workers, suppliers and distributors. Indeed, a review by the Department for Transport¹²⁴ found that “current and expected levels of services provided by transport infrastructure (e.g. the quality, reliability, time and financial costs of journeys using it etc.) are a crucial component in the actual location decisions.”

- 7.4.4 The importance of transport connectivity was highlighted through the consultation exercise, with an agent noting that whereas proximity to the canal network was a key locational driver for industrial and logistics businesses historically, access to the strategic road network was now a key driver, particularly for logistics businesses, with the borough’s proximity to the M6 and wider strategic road network identified as an opportunity. Wigan’s position on the West Coast Main Line, both for passenger and rail-freight access, and geographical location between Manchester, Liverpool and Preston were also highlighted as strengths. However, as previously referenced, challenges associated with through-borough connectivity and the availability of sufficient parking linked to employment sites were repeatedly noted by stakeholders as issues that needed to be addressed both directly by the council, and indirectly by influencing wider planning levers at a Greater Manchester and national level.
- 7.4.5 The availability and reliability of utilities is also a key determinant of investment in new sites and premises. As noted by Knight Frank¹²⁵, the ability to secure energy supply has been a critical area of concern for investors and occupiers and is holding up development across the UK, with developers struggling to secure connections for new projects, and those seeking to build out renewable generation sites are unable to connect to supply. Indeed, recently the Greater London Authority implemented a temporary moratorium on new development in a group of West London boroughs because of grid capacity issues.
- 7.4.6 With some estimating that renewable energy projects face a 15-year wait to connect to the grid¹²⁶, there is the opportunity for those with rooftop space or land to generate power for personal use. The consultation with agents also noted that power infrastructure had also been a key determinant of recent high profile investment decisions in the UK more widely, such as Jaguar Land Rover’s decision to locate a gigafactory in Bridgwater, Somerset.
- 7.4.7 While physical infrastructure is likely to continue to play a pivotal role in attracting investment, the importance of digital infrastructure has been growing in recent years. Internet connectivity, good broadband and Wi-Fi availability and, more recently, the roll-out of fibre optics and the establishment of data centres are all positive markers. Covid-19 and the shift to hybrid working has accelerated the need for good broadband connectivity, fibre networks and the 5G roll-out.

Labour availability and skills

- 7.4.8 Local labour availability and skills can be a key determinant of location selection by determining operational efficiency and cost-effectiveness.
- 7.4.9 The availability of labour can impact the ease with which a business can recruit and maintain a workforce. In areas where labour is scarce, businesses may struggle to fill vacancies, leading to operational inefficiencies. On the other hand, areas with a surplus of labour may offer a larger pool of potential employees, making recruitment easier and potentially more cost-effective.
- 7.4.10 The skills of the local labour force are equally important. If a business requires specialised skills, it may need to locate in an area where these skills are readily available. For example, a tech start-up may choose to locate in a city known for its technology sector, where there is a high concentration of workers with the necessary skills. Conversely, if a business requires unskilled labour, it may choose to locate in an area where labour costs are lower.
- 7.4.11 As noted in the previous sections, Wigan Borough underperforms relative to Greater Manchester and the national average in relation to higher level skills and has a higher proportion of the working age population with no qualifications. However, the borough is experiencing positive growth in educational attainment and consultation highlighted that it has a strong foundation of high-performing schools and colleges. The local education system can play a role in shaping the skills of the local labour force.

¹²⁴ <https://dspace.stir.ac.uk/bitstream/1893/17048/1/Dft-transport%2004%20%20web.pdf>

¹²⁵ <https://www.knightfrank.com/research/article/2023-05-03-powering-ahead-or-down-uks-grid-lock-constraining-the-renewable-transition-property-development>

¹²⁶ <https://www.energylivenews.com/2023/01/30/uk-batteries-and-renewables-wait-15-years-to-connect-to-the-grid/>

Areas with strong education systems may produce a workforce with a wider range of skills, making them attractive to businesses.

- 7.4.12 Employers themselves face a balancing act of ensuring practical skills are in place for the 'here and now' to deal with 'business as usual' operations, while also looking ahead to the skills needed for future business development and success in the longer term. One means of addressing this challenge is through investment in education and training, with the consultation exercise highlighting evidence of relationships between local businesses and the college network in Wigan Borough helping to drive the delivery of apprenticeships/training to meet local needs. The potential to further develop partnerships between providers and employers to deliver against skills gaps – particularly in relation to emerging themes such as digital and net zero/decarbonisation – was highlighted, with the need to ensure that progress in improving attainment at school age translates into a better skilled working age population. However, the preponderance of micro-businesses and SMEs within the borough can limit investment in training/upskilling, due to cost and time constraints and challenges associated with retaining trained staff (i.e. companies noted challenges in retaining workers that they have trained, because training increased attractiveness to other employers or resulted in a wage premium to encourage them to remain).
- 7.4.13 Other means by which companies address labour availability and skills shortages include the use of migrant labour/recruitment from outside the area, flexible working, adjusting rewards/work conditions to make jobs more attractive and subcontracting¹²⁷. The consultation highlighted that a benefit of the move to hybrid working was the ability to broaden where companies recruit from, with one company noting that they were able to recruit from further afield given the ability to work remotely and only attend the office 1-2 days a week.

Environment

- 7.4.14 While companies seldom base their locational decisions solely on quality-of-life issues, factors such as housing, schools, amenities and crime can play an important role in the decision-making process, especially for those dependent on attracting and retaining skilled staff.
- 7.4.15 House prices in Wigan Borough stand at 20.1% below the GM average¹²⁸ and the Places for Everyone Plan sets out plans for at least 16,527 new homes in the borough over the period 2022-39, a notable proportion of which would be expected to cater for young professionals aged 20-39 with a family. As such, there is the potential for Wigan Borough to not only provide suitable homes for existing and future workers, but also to attract people from outside of the borough, thereby increasing the working age population and skills base. As previously stated, the borough has a strong foundation of high-performing schools, translating to an Attainment 8 score at Key Stage 4 of 49.7, with only Trafford (60.2%) and Stockport (52.7%) higher across Greater Manchester, which may also support determination of location for businesses and workers.
- 7.4.16 The consultation exercise emphasised the importance of town centres and local amenities to businesses. In relation to Wigan town centre, consultees noted the challenges associated with the decline of retail, resulting in vacancy and poor amenity, and a perceived lack of quality and choice of food and beverage, hotel and leisure options. The condition of the town centre was identified as a potential issue in attracting developers and investors, contributing to challenges associated with the perception of Wigan as a place to do business. Furthermore, stakeholders identified the area around Wigan North Western and Wallgate stations as being unattractive and offering a poor first impression to clients.
- 7.4.17 However, it was highlighted that positive steps had been taken through the Galleries redevelopment and wider regeneration projects. Furthermore, some stakeholders noted that the external perception of Wigan is outdated and does not reflect the reality of living in the borough: the range of high-quality neighbourhoods, green space and the natural environment (including the Flashes of Wigan and Leigh National Nature Reserve) and sense of community on offer. It was highlighted that there is a need to re-position and promote Wigan Borough as a place to work, live and play with partners locally and

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https://assets.publishing.service.gov.uk/media/5fb50f37d3bf7f63e9033189/131120_FINAL_literature_review_for_publication.pdf

¹²⁸ ONS House Price Statistics for Small Areas (HPSSAs) March 2023. Median price.

across Greater Manchester and through social media, with the DW Stadium (now The Brick Community Stadium) Social media campaign highlighted as a good example.

- 7.4.18 On a similar basis, in order to support inward investment, it was viewed that there was a need to allocate further resource to more actively promote opportunities for investment and development in Wigan Borough with partners such as MIDAS, the Growth Company and UK-wide agencies, with consultees noting the success of Warrington & Co in driving inward investment in a similarly located area. This could be supported through gaining a greater appreciation of companies active in the borough and their supply chains to understand the business ecosystem and how it might complement potential investors' activities, with the ability to present "success stories" viewed as being a useful tool to support engagement. Furthermore, this activity could also identify potential growth areas for local businesses based locally, to grow and thrive within the borough, with the challenge of encouraging local start-ups and microbusinesses to scale up noted as a challenge by stakeholders.
- 7.4.19 The importance of effective place-making in realising the Council's growth ambitions and the vision set in the Places for Everyone Plan was another key conclusion from the consultation and supporting research. Whereas storage and distribution and larger general industrial occupiers tend to prefer large sites close to key transport nodes, many small and micro enterprises will have an interest in occupying space which sits alongside other uses, including housing. This preference is becoming more prominent with the uptake in hybrid-working arrangements that drive demand for the use of space close to home. The types of jobs most associated with hybrid working arrangements are professional and scientific roles, typically high value added in nature, which will support other jobs. The provision of space to meet the needs of such occupiers within new mixed-use developments should be considered by the council during the planning process to attract such jobs to the area. The consultation exercise engaged with developers interested in providing such developments, indicating market demand.
- 7.4.20 The ability to secure and attract businesses to the local area to help meet local growth aspirations will be based on a combination of these factors, alongside wider considerations associated with the affordability of commercial floorspace – on average the second highest expense for businesses after labour costs – the quality of space; and proximity to the customer base or clusters of business activity. However, these are key considerations for the council and partners to address which have the potential to unlock investment and contribute to the borough's growth aspirations.

7.5 Conclusion

- 7.5.1 The previous sections have considered Wigan Borough's economic performance, its sectoral outlook and conditions in the commercial property market, based on analysis of data and market intelligence and consultation with key stakeholders. The Strengths, Weaknesses, Opportunities and Threats in relation to the borough's economic performance are summarised in Table 17.

Table 17 Wigan SWOT

STRENGTHS	WEAKNESSES
1. Strong economic foundations in core sectors of construction, manufacturing, health and social care and logistics.	1. More limited employment and opportunities in higher productivity sectors such as ICT, professional services and financial services, leading to highly skilled residents leaving the borough / commuting outside for work.
2. Net increase in businesses in past 5 years.	2. Limited number of large, anchor firms, viewed as meaning reduced opportunities for skills development, progression and retention within Wigan.
3. Low vacancy rates across employment land use classes (office and industrial)	3. Educational attainment lags other Greater Manchester boroughs at higher levels (NVQ Level 3 and 4+).
4. Apprenticeship take-up exceeds the national average.	4. Low job density causes high levels of outward commuting.
5. Economic activity levels exceed Greater Manchester and the national average.	
6. Proximity to the M6, M58, M61, M60 and A580 (key strategic routes) and wider transport infrastructure.	

<p>7. Strong demand for industrial (B2) and warehousing and distribution (B8) floorspace over the past decade, robust rental values and yields broadly in line with Greater Manchester and national averages.</p> <p>8. Higher proportion of new industrial floorspace (delivered since 2010) compared with Greater Manchester.</p> <p>9. Strong foundation of high-performing schools and colleges.</p> <p>10. Strong relationships between many employers and the college network in the borough.</p> <p>11. Quality of life factors such as the relatively lower cost of housing, high-quality neighbourhoods, green space and the natural environment.</p>	<p>5. Viability challenges, particularly for office uses with limited office floorspace delivered since 2010 vs comparators.</p> <p>6. Productivity gap has widened vs Greater Manchester and national average since the global financial crisis.</p> <p>7. In-borough connectivity noted by consultees to be challenging, leading to long journey times.</p> <p>8. Amenity and quality of offer currently available in Wigan and Leigh town centres.</p> <p>9. Negative/outdated external perception of Wigan that does not accurately reflect life in the borough.</p>
OPPORTUNITIES	THREATS
<ol style="list-style-type: none"> 1. Net zero and decarbonisation has the potential to drive significant investment in Wigan' core sectors and present inward investment opportunities¹²⁹. 2. Potential for large scale development for employment uses at M6 Junction 25. 3. Near/re-shoring of manufacturing to increase resilience/support ESG goals could present inward investment opportunities. 4. Improvements in educational attainment, linked to the strong provider network, having the potential to continue to narrow the educational attainment gap. 5. Potential to realise productivity improvements across foundational economy businesses. 6. Town centre regeneration projects (e.g. The Galleries, Eckersley Mills) present opportunities to increase Wigan's attractiveness to potential occupiers. 7. Ambitious housebuilding plans offer the potential to attract and retain working age residents to the borough. 8. Potential to further develop partnerships between educational providers and employers to deliver against skills gaps – particularly in relation to emerging themes such as digital and net zero/decarbonisation. 9. Opportunities with partners locally and across Greater Manchester to re- 	<ol style="list-style-type: none"> 1. Macroeconomic influences: inflation, interest rates, cost of living, Covid 19, Brexit etc. which have historically resulted in steep and prolonged downturns, slow returns and short upswings in Wigan's economic cycle. 2. Changes in minimum energy efficiency standards (MEES) necessitating the upgrading, retrofitting and/or replacement of building stock, with the challenge more acute for office stock in Wigan. 3. Ageing population could lower participation rates in the workforce.

¹²⁹ As noted by the EY Attractiveness Survey (June 2023), if the UK is to fully realise the opportunities that manufacturing creates — and is to build the industrial capacity it needs to reach net zero — its proportion of FDI projects needs to be higher.

position and promote Wigan as a place to work, live, play and invest.	
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8. Current Supply

8.1 Introduction

- 8.1.1 This section provides a summary of the characteristics of the supply of employment land in Wigan, based on its alignment with current and future market demand. The analysis of employment land was conducted via site surveys, desk-based research and individual site profiles provided by Wigan Council.
- 8.1.2 A total of 57 employment areas, as defined by Wigan Council, form the basis of this assessment. These comprise of 35 primary employment areas and 22 other undesignated employment areas across the borough. An assessment of the suitability of Wigan Borough’s vacant land supply to meet current and future demand, including sites within existing employment areas and sites allocated in the Places for Everyone Plan, is also undertaken.

8.2 Assessment of Employment Areas

- 8.2.1 A detailed assessment of each employment area’s alignment with current and future market demand was undertaken informed by Wigan Council monitoring data and ratified by desk-based investigation and a site survey undertaken in August 2023. This section presents the overall findings of the site assessment.
- 8.2.2 As set out in Section 7 of this report, there are a number of requirements for businesses in the borough’s core and cross-cutting sectors and wider influences on demand for employment land. Reflecting this, the assessment considers the following criteria:

Table 18 Employment Area Assessment Criteria

Domain	Rationale
Building age Building condition (where applicable)	Consultation in support of this study has highlighted that industrial and logistics companies are increasingly demanding high quality (Grade A) floorspace, whilst the office market is transitioning in response to demands for better quality spaces that are attractive enough to earn the employees’ commute, support evolving work patterns, and offer a competitive advantage. This is linked to the need for functionality (e.g. sufficient eaves height and flexible, collaborative workspace), companies’ ESG commitments and wider drivers in relation to minimum energy efficiency standards.
Quality of public realm, environment and surroundings	The quality of the public realm is a key consideration across sectors and uses. Whereas historically this would have been more of a consideration for office uses – for which it remains a greater driver – industrial and logistics investors are increasingly looking to accommodate future growth in more of a business park environment incorporating high quality public realm and access to amenities on or in proximity to sites.
Access for commercial traffic to primary road network / motorway	Transport connectivity is a key determinant of inward investment, with access to staff, customers and the supply chain key considerations for businesses across production and services sectors. The importance of transport connectivity was highlighted through the consultation exercise, with access to the strategic road network a key driver, particularly for industrial and logistics businesses.
Access by public transport	Proximity to public transport is an important consideration for businesses to be able to access a wide and diverse pool of labour, both from local communities and as a means to access requisite skills, given Wigan Borough’s relative underperformance in relation to higher level skills. This is particularly the case for office employment, which benefits from greater workforce mobility.

Domain	Rationale
The presence of core and/or cross-cutting sectors	Proximity to the customer base / supply chain or clusters of similar business activity is a determinant of site selection across production and services sectors, as well as potentially highlighting an area's suitability to support these uses.
Compatibility of surrounding land uses	The presence of sensitive uses neighbouring a site (e.g. residential properties) can limit operations by causing environmental conflicts relating to traffic, parking, noise, visual impact/screening and emissions, and therefore limit the attractiveness of a site particularly for industrial uses.
Vacant floorspace	While representing a moment in time, the presence of a large amount of vacant floorspace may indicate the attractiveness of a site, particularly given the limited spare capacity available in the borough's commercial property market, set out in Section 6.
Market attractiveness	The market attractiveness of sites varies according to the demand for different types of premises. Market perceptions are also influenced by factors such as the quality of the built environment and environment surrounding a site, presence of neighbouring uses and the accessibility of a site. Good location and access are often viewed as pre-requisites for employment sites and exert a strong influence on marketability of a site for employment use. Furthermore, a potential site must meet minimum size requirements needed to make a given development economically viable. For B-class uses it is necessary to have sufficient land for a critical mass of similar activities to be established whereas a relatively small site may be large enough to make E(g)(i), E(g)(ii) or E(g)(iii) development feasible. The marketability of existing employment sites has been assessed for both the present and the medium / long term future.
Suitability for meeting needs of core/cross-cutting sectors	Drawing together the analysis against the domains noted above and the analysis set out in Section 7, the assessment considers the sites' suitability to meet the needs of the borough's core and cross-cutting sectors.

- 8.2.3 The assessment comprises a RAG rating against a number of criteria, whereby green represents the best performing and red represents the worst performing, complemented by a narrative assessment for appropriate domains.
- 8.2.4 While the assessment highlights the highly suitable employment areas that best align with the requirements of Wigan Borough's key sectors and growth aspirations, it is important to note that lower quality employment areas can also perform an important function within the local economy, such as by supporting vital, if lower amenity, uses or providing more affordable space for businesses, and the assessment should be viewed in this context.
- 8.2.5 Given the large number of employment areas identified, the information presented in this section is broken down spatially, grouped by settlements in proximity to one another as follows:
- Atherton, Leigh and Tyldesley
 - Hindley, Abram, Golborne and Ashton-in-Makerfield
 - Wigan, Ince, Standish and Orrell

Atherton, Leigh and Tyldesley

- 8.2.6 The identified occupier typologies, business types, employment uses and land uses within the identified employment areas in Atherton, Leigh and Tyldesley are shown in Table 19.

Table 19 Employment Areas and Uses (Atherton, Leigh and Tyldesley)

Ref	Name	Settlement	Size (ha)	Business Use/Occupier Typologies	Employment/Land Uses
6	Kiribati Way and Kirkhall Lane	Leigh	7.06	Manufacturing; motor trades; construction.	B2; E(g)(iii); B8.
7	Bridgewater	Leigh	5.52	Manufacturing	B2; E(g)(iii).
8	Hope Carr/Leigh Commerce Park	Leigh	36.45	Construction; engineering; motor trades; retail; wholesale; manufacturing.	B2; E(g)(i); E(g)(iii); B8.
9	Chaddock Lane	Tyldesley	36.66	Construction; manufacturing; logistics; motor trades; retail; wholesale.	B2; B8; E(g)(iii); Sui Generis.
10	Parr Brow	Tyldesley	1.79	Professional services; engineering.	B2; E(g)(iii).
11	Chanters Industrial Estate	Atherton	14.62	Motor trades; logistics; waste management; manufacturing; construction.	B2; B8; Sui Generis.
12	Gibfield	Atherton	24.2	Construction; retail; motor trades; engineering; creative industries; digital; manufacturing.	B2; E(g)(i); E(g)(iii); Sui Generis.
37	Bolton House Road	Leigh	2.05	Construction; motor trades; engineering.	B2; B8.
38	Bolton Road, Atherton	Atherton	5.86	Retail; motor trades; construction; hospitality/tourism; leisure	B2; E(g)(iii); Sui Generis.
39	Brewery Lane Leigh	Leigh	0.76	Digital; health and social care; business services; wholesale; construction; motor trades; retail.	E(g) (i); Sui Generis.
42	English Street	Leigh	1.71	Manufacturing; retail; logistics.	B2; B8; E(g)(i); E(g)(iii); Sui Generis.
43	Firsdale Industrial Estate	Leigh	2.99	Motor trades; construction; retail; logistics; manufacturing; car repair workshop	B8; E(g)(iii); Sui Generis
50	Lower Green Lane	Tyldesley	5.47	Construction; logistics	B8; E(g)(i)
51	Mather Lane	Leigh	0.72	Construction; retail; wholesale; gym; voluntary organisations	E(g)(i); Sui Generis.
53	Mort Lane	Tyldesley	1.77	Construction; logistics; waste management; communications; motor trades.	B2; B8; Sui Generis
54	Platt Fold Street	Leigh	3.64	Construction; manufacturing; digital; logistics; professional services; waste management; motor trades; retail.	B2; B8; E(g)(i); Sui Generis

8.2.7 The assessment of each employment area is shown in Table 20. The RAG rating indicates the performance of the employment area against key criteria, with green indicating a good performance (suitable against the criterion to support employment activities), amber an average performance and red a poor performance (unsuitable against the criterion to support employment activities), with narrative commentary against the remaining domains.

- 8.2.8 Overall, there are few employment areas that offer good accessibility, with the majority being some distance from the strategic road network and having limited public transport connectivity. There are some higher performing employment areas, including Hope Carr/Leigh Commerce Park (8) and Gibfield (12), which are generally well proportioned and benefit from a higher quality of public realm and surroundings and building condition, alongside reasonable access to the primary road network – potentially enhanced by planned investment to improve links to the M61 in the case of Gibfield (12) – and by public transport. These sites are better suited to meet the requirements of Wigan Borough’s core and cross-cutting sectors.
- 8.2.9 Conversely, there are employment areas that perform more poorly against the identified domains, such as Bolton House Road (37), English Street (42), Firsdale Industrial Estate (43) and Mort Lane (53), which are low in quality and poorly accessed. These are not well suited to meeting the requirements of core and cross-cutting sectors, but could potentially be suitable for lower amenity uses across these sectors.

Table 20 Employment Area Assessment by Domain (Atherton, Leigh and Tyldesley)

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
No.	-	-	Land area (ha)	RAG	RAG	RAG	RAG	RAG	Name	Name/Comment	Area (m ²)	Present Marketability	Medium-Long Term Marketability	Narrative
6	Kiribati Way and Kirkhall Lane	Leigh	7.06						Manufacturing; construction.	Residential (adjacent); green space to the west separated by Westleigh Brook	276	Good/Moderate - good to moderate condition stock ranging from 1980s to 2000s with functional environment and reasonable access to the primary road network/public transport	Moderate - aged light industrial would require re-build/retrofit and improvements to the quality of the internal environment.	Moderate quality environment and reasonable access, alongside site size and layout, likely to meet needs of manufacturing use. Nearby sensitive uses and limited access to the SRN limits opportunities for construction or logistics.
7	Bridgewater	Leigh	5.52						Manufacturing	Site is surrounded by residential; adjacent uses include a primary school; access to the rear of residential area/past school or through residential area (Henry Street)	55	Moderate/Poor - stock generally in poor condition, with some refurbishment, ranging from 1920s to 1960s with basic external environment. Reasonable access to the primary road network/SRN and public transport.	Moderate/Poor - aged stock and surrounding sensitive receptors/access via residential limit the site's attractiveness	Currently supports manufacturing and advanced manufacturing but surrounding uses, building age and environment not conducive to modern manufacturing.
8	Hope Carr/Leigh Commerce Park	Leigh	36.45						Construction; engineering; manufacturing.	Residential to the north west and east of the site (generally well segregated by woodland/allotments and green space - Hope Carr Nature Reserve); canal to the north of the site	2,852	Good - buildings vary in age but condition good/excellent and good quality external environment. Nearby access to A580, and reasonable access to public transport.	Good - site segregated from neighbouring uses with good access off A574 Warrington Road (only 340 metres north of the A580 East Lancashire Road).	Large, segregated site with good access, buildings in good condition and a good quality environment. Well suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses associated with net zero and decarbonisation.
9	Chaddock Lane	Tyldesley	36.66						Construction; manufacturing; logistics.	Residential (mainly segregated, but some in close proximity to the east and west).	22,593	Good/Moderate - a mix of property ages ranging from post-war to recent modern; some need for refurbishment/redevelopment with reasonable quality external environment. Good access to the A580 and moderate access to public transport.	Good/Moderate - site has good access but age/condition of stock will require refurbishment/renovation and proximity to sensitive receptors to the east and west limits the site's attractiveness	Large, mostly segregated site with good access, buildings in varied condition and an environment of varied quality. Suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
														associated with net zero and decarbonisation.
10	Parr Brow	Tyldesley	1.79						Engineering.	Residential to the east	4,001	Moderate - aged stock in moderate condition; quality of environment poor/reasonable; moderate access to primary road network (less than 1km from the A580 via A577) and good access to public transport (bus services and Leigh guided busway)	Moderate/Poor - reasonable access but small site, with aged stock and surrounding sensitive uses limits its attractiveness.	Limited long-term attractiveness to core/cross-cutting sectors given site size and neighbouring uses.
11	Chanters Industrial Estate	Atherton	14.62						Logistics; manufacturing; construction.	Residential but well segregated by planting/green space/road. Hindsford Brook to the north of the site	218	Moderate - buildings ranging from post WWII to 2000s of a variable condition in a low amenity site. Constrained access to the site off the A577 with reasonable access by public transport.	Moderate - low amenity environment and supported uses (e.g. scrap/breakers yards) with some evidence of modern development but much stock in need of refurbishment/redevelopment.	Well segregated site with moderate access and a varied quality of environment and building condition. Suited to lower value/amenity construction and manufacturing uses.
12	Gibfield	Atherton	24.2						Construction; engineering; creative/digital; manufacturing.	Some residential in close proximity to the south/east/north of the site; green space to the west/northwest	2,493	Good/moderate - buildings vary in age but of good condition in a good/moderate quality environment. Moderate access to the primary road network and public transport.	Good - north of the site has better quality environment and buildings. Lower quality environment and lower amenity uses in the south. Access to A577, potentially improved access to M61 in the future.	Well suited to a variety of sectors including manufacturing; construction; health and social care (proximity to Leigh Infirmary and RBH); presence of digital and creative and links to Manchester (M61/Manchester to Southport Line). Could also accommodate uses associated with net zero and decarbonisation.
37	Bolton House Road	Leigh	2.05						Construction; engineering.	Residential to the north, along narrow, poor quality access road to the site. Otherwise surrounded by green space.	0	Poor - Old, poor condition buildings and external environment in need of modernisation/renovation, supporting low amenity uses.	Poor - Poor quality site supporting low amenity uses in need of modernisation / renovation. However, supports low amenity uses which serve a function in the local economy.	Suited to lower value/amenity construction and manufacturing uses.
38	Bolton Road, Atherton	Atherton	5.86						Construction.	Residential in close proximity, opposite and/or to the rear.	495	Moderate - variable age/condition of buildings and quality of environment. Moderate access to primary road network via A579 and	Moderate/poor - some modernisation / renovation of buildings and improvements to the overall environment required; surrounding	Site with moderate access to the road network, well served by public transport, with variable quality of environment and building condition. Suited to small

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
												good access to public transport (bus and Atherton station).	residential limits attractiveness.	scale light industrial (manufacturing).
39	Brewery Lane Leigh	Leigh	0.76						Digital; health and social care; construction.	Area around the site is primarily residential, with a nursery towards the south.	71	Moderate – aged buildings in good/excellent condition and good quality of environment. Moderate access to the primary road network (via A579) and public transport	Moderate quality site, with surrounding/internal sensitive uses limiting attractiveness for industrial activities	Good environment and building condition. Likely to be attractive to smaller businesses and start-ups (including in digital/health and social care) and small scale light industrial (manufacturing).
42	English Street	Leigh	1.71						Manufacturing; logistics.	Residential to the west but well segregated.	735	Moderate/poor - aged buildings of reasonable condition in an environment of reasonable quality. Poor access to the primary road network and constrained access to the site, with limited access by public transport.	Poor – Small, poor quality site with limited access in need of modernisation/renovation of buildings and environment.	Site quality and access poorly suited to meet the needs of core and cross-cutting sectors
43	Firsdale Industrial Estate	Leigh	2.99						Construction; logistics; manufacturing.	Primary school south of the site, residential to the east, segregated by road. The west of the site is predominantly green space.	0	Moderate/poor - aged buildings of reasonable condition in an environment of reasonable quality. Constrained access to site and primary road network, with moderate access by public transport.	Poor – Poor quality site with limited access in need of modernisation / renovation of buildings and environment.	Site quality and access poorly suited to meet the needs of core and cross-cutting sectors
50	Lower Green Lane	Tyldesley	5.47						Construction; logistics	Sparsely distributed residential buildings around and in the site.	0	Moderate/poor - range of building ages/condition in a reasonable quality environment with poor access to the primary road network/public transport.	Moderate/poor - some modernisation/renovation of buildings and improvements to the overall environment required	Suited to lower value/amenity construction and manufacturing use.
51	Mather Lane	Leigh	0.72						Construction.	Church to the east of the site, separated by a road.	634	Moderate/Good - range of building ages generally in good condition in a good quality environment. Constrained access in reasonable proximity to the primary road network offering reasonable access to public transport.	Moderate - some modernisation/renovation of buildings and constrained access/site size limits attractiveness of the site.	Access and site size limits suitability for the core and cross-cutting sectors.
53	Mort Lane	Tyldesley	1.77						Construction; logistics.	Site is predominantly surrounded by greenspace, with	0	Poor - Old, poor condition buildings and external environment supporting low amenity uses, with	Poor - Poor quality site in need of modernisation / renovation of buildings and environment.	Relatively isolated site suited to lower value/amenity construction and manufacturing use.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
										some industrial buildings along Mort Lane.		moderate access to the primary road network via the A5082, with no nearby public transport access.	However, supports low amenity uses which serve a function in the local economy.	
54	Platt Fold Street	Leigh	3.64						Construction; manufacturing; digital; logistics.	Area around site is primarily residential, segregated by roads. There is a nursery towards the south of the site and a bowling club towards the north.	1,135	Moderate - a range of buildings built from 1980-2000 in variable condition, with the external environment of a reasonable standard. Moderate access to the primary road network, with constrained egress from the site via Leigh town centre, and moderate access to public transport.	Moderate/Poor - site in need of modernisation / renovation of buildings and environment. Constrained egress via Leigh town centre limits attractiveness.	Site with moderate access to the road network, with variable quality environment / condition buildings. Suited to small scale light industrial (manufacturing).

Hindley, Abram, Golborne and Ashton in Makerfield

8.2.10 The identified occupier typologies, business types, employment uses and land uses within the identified employment areas in Hindley, Abram, Golborne and Ashton in Makerfield are shown in Table 21.

Table 21 Employment Areas and Uses (Hindley, Abram, Golborne and Ashton in Makerfield)

Ref	Name	Settlement	Size (ha)	Business Use/Occupier Typologies	Employment/Land Uses
1	Stone Cross Park	Golborne	30.88	Construction; manufacturing; logistics; professional services; utilities.	B2; B8; E(g) (i); E(g)(iii)
2	Golborne Enterprise Park	Golborne	3.23	Manufacturing; Construction; Digital and Retail	B2; B8; Sui Generis.
3	Bridge Street	Golborne	7.26	Storage and distribution; construction; digital	B2; B8; E(g)(i); Sui Generis.
4	Newton Road	Golborne	7.1	Motor trades; construction; logistics; manufacturing.	B2; B8; E(g)(iii); Sui Generis
5	Moss Industrial Estate	Golborne	19.46	Construction, manufacturing; motor trades; retail; wholesale, logistics; business services; digital.	B2; B8; E(g)(iii); Sui Generis.
14	West of Leigh Road	Hindley	56.36	Manufacturing; logistics.	B2; B8.
15	Swan Lane	Hindley	26.71	Manufacturing; motor trades; retail; construction.	B2; E(g)(iii); Sui Generis.
34	Land Gate	Ashton	10.63	Motor trades; construction; wholesale; manufacturing	B2; E(g)(iii); B8
35	Link 25 Industrial Estate	Ashton	3.11	Construction; manufacturing; motor trades; gym	E(g)(iii); Sui Generis.
36	South Lancashire Industrial Estate	Ashton	90.63	Logistics; manufacturing; construction; motor trades.	B2; B8; E(g)(i); E(g)(iii); Sui Generis.
41	Darby Lane	Hindley	1.28	Construction; motor trades.	Sui Generis.
44	Greenbank Industrial Estate	Hindley	1.68	Logistics; construction; professional services; retail.	B8
45	Harvey Court and Bank Street	Golborne	4.67	Manufacturing; construction; engineering; logistics; motor trades; retail.	B2; B8; E(g)(iii); Sui Generis.
47	Hindley Business Centre	Hindley	2.02	Retail; construction; engineering; professional services; logistics; wholesale.	B8; E(g)(i).
48	Junction Works, Bickershaw Lane	Abram	2.36	Waste transfer station and associated premises.	Sui Generis; E(g)(i).
58	Wigan Road, Golborne	Golborne	6.52	Manufacturing; construction; logistics; wholesale	B2; B8

8.2.11 The assessment of each existing employment area is shown in Table 22.

- 8.2.12 Overall, these employment areas tend to have better access to the primary road network / motorway than observed in Atherton, Leigh and Tyldesley, owing to their locations adjacent to, or with good access to, the primary road network. However, a number of sites have relatively poor public transport connectivity. The public realm, environment and surroundings of established business parks and industrial areas are rated highly, alongside the building quality, though a number of employment areas have older stock.
- 8.2.13 Higher performing employment areas including Stone Cross Park (1), Golborne Enterprise Park (2), Newton Road (4), Moss Industrial Estate (5), Land Gate (34) and South Lancashire Industrial Estate (36), have attributes to support their long term marketability for use by Wigan Borough's core and cross-cutting sectors.
- 8.2.14 There are few employment areas that perform poorly across multiple domains, with Junction Works on Bickershaw Lane an outlier in this regard. However, this site serves an important function in the local economy (waste management) and could support other low value/amenity construction and manufacturing uses.

Table 22 Employment Area Assessment by Domain (Hindley, Abram, Golborne and Ashton in Makerfield)

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
No.	-	-	Land area (ha)	RAG	RAG	RAG	RAG	RAG	Name	Name/Comment	Floor-space m ²	Present Marketability	Medium-Long Term Marketability	Narrative
1	Stone Cross Park	Golborne	30.88						Construction; Manufacturing; Logistics.	Site is highly segregated by roads and green space.	751	Good - site fully built out in past 25 years with buildings in good condition and high quality external environment. Almost direct access to the A580 and reasonably well served by public transport.	Good - large, relatively modern employment park, with access almost directly from the A580 to the south, and good access to the surrounding motorway network.	Modern, fit-for purpose environment with good access to the primary road network well suited to a range of uses including construction, manufacturing and logistics, as well as accommodating uses associated with net zero and decarbonisation.
2	Golborne Enterprise Park	Golborne	3.23						Manufacturing; Construction; Digital.	Site is surrounded by residential and retail but is segregated by roads. There is green space north of the site.	316	Good - range of properties aged from 1980-1999 or 2000 to present day, in good condition with good quality external environment. Short distance to the A580 and reasonably well served by public transport. Reasonable access to the primary road network (1km from A580) and served by a number of bus routes.	Good - small employment site in good condition with moderate access, potentially improved by completion of Golborne rail station in 2026.	Good quality site with moderate access suited to a variety of sectors including manufacturing and construction, as well as accommodating uses associated with net zero and decarbonisation. Future rail links could support service sector/E(g)(i) uses (e.g. digital uses).
3	Bridge Street	Golborne	7.26						Logistics; Construction; Digital	Area around Site is predominantly residential, but segregated.	0	Moderate - buildings range from 1980s to modern development with buildings and external environment in reasonable condition. Good access to the primary road network (A580 to the south) off Bridge Street, close to residential areas.	Moderate - reasonable quality site, in need of some modernisation in places. Good access to primary road network but surrounding sensitive uses may limit attractiveness for industrial activities. Potentially improved access to public transport through completion of Golborne rail station.	Medium sized site with good primary road access but with an external environment and building conditions of variable quality. Suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses associated with net zero and decarbonisation.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
4	Newton Road	Golborne	7.1						Construction; Logistics; Manufacturing.	Area around site is predominantly residential but well segregated. There is a school towards the south-west of the site.	6,685	Good/Moderate - buildings range from late 1970s through to 2000s, ranging from moderate to good condition, with an external environment of variable quality. Immediate access to A572 and only 1km to A580, and served by a number of bus routes.	Good/moderate - reasonable quality site, in need of some modernisation in places. Good access to primary road network.	Medium sized site with good primary road access but with an external environment and building conditions of variable quality. Suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses associated with net zero and decarbonisation.
5	Moss Industrial Estate	Golborne	19.46						Construction, Manufacturing; Logistics; Digital.	Residential buildings surround the site, with green space to the north.	1,116	Good - A mix of ages for properties (1960s/70s through to present day) in reasonable/good condition and high quality external environment. Good access to the A572 from which the A580 East Lancashire Road can be accessed in both directions, and served by a number of bus routes.	Good - a large, well-maintained, employment area with good access to the A580 East Lancashire Road.	Modern site in good condition with good access to the primary road network. Well suited to a range of uses including construction, manufacturing and logistics, as well as accommodating uses associated with net zero and decarbonisation.
14	West of Leigh Road	Hindley	56.36						Manufacturing; Logistics.	Site is mainly surrounded by green space, with some residential buildings to the east and south.	28	Moderate/Poor - buildings are mainly 1960s to 1980s in reasonable condition; moderate standard external environment. Access to the primary road network generally poor. Bus routes accessible near the site.	Moderate - Some modernisation/renovation of buildings and improvements to the overall environment required. Attractiveness potentially increased by investment to improve links to the M61 and market interest evident through area, with the frontage of the site having a recently approved planning application for 17 B2/B8 industrial units and 2 class E (B) 'Drive Thru' restaurants.	Site with old building stock, with an external environment and building conditions of variable quality. Moderate access to the road network potentially enhanced through planned investment to improve links to the M61, which could support manufacturing, transport and logistics, construction and uses associated with net zero and decarbonisation.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
15	Swan Lane	Hindley	26.71						Manufacturing; Construction.	Area around site is mainly residential, with greenspace east of the site. There is a school towards the south of the site.	8,190	Moderate - buildings range from 1970s to present day; generally in good condition with reasonable to good quality external environment. access is from the A577 to the south, but to the primary road network is poor with limited access by public transport.	Moderate - well-established employment area in good condition. Access to the site relatively poor and the site is therefore better suited to local SME occupiers.	Quality environment and access limit attractiveness but could support smaller scale manufacturing or construction use.
34	Land Gate	Ashton	10.63						Construction; Manufacturing	There are some residential areas around the site but they are well segregated by roads. To the north and the east of the site there is green space.	265	Moderate/Good - Properties vary in age but typically date from the 1970s and 1980s, in reasonable to good standard with a functional external environment. Very good access to the A49 and to M6 Junction 25 which is effectively adjacent, with the site served by regular bus services.	Good - reasonable quality site, in need of some modernisation / improvement to the environment in places. Good access to primary road network increases attractiveness.	Medium sized, mostly segregated site with good access, aged buildings and an external environment of variable quality. Suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses associated with net zero and decarbonisation.
35	Link 25 Industrial Estate	Ashton	3.11						Construction; Manufacturing.	Area to the west of the site is green space. There are residential buildings towards the east but the site is well segregated from them.	0	Moderate - aged (1970s) buildings in moderate condition and reasonable quality external environment. Good access off the A49 Wigan Road 0.5km to the south of Junction 25 of the M6 Motorway and the site is served by regular bus services.	Good - site in need of some modernisation / improvement to the environment in places. Good access to primary road network increases attractiveness. However overall size limits attractiveness for larger occupiers (e.g. logistics).	Small, well segregated site with good access, aged buildings and an external environment of variable quality. Suited to a variety of sectors including manufacturing; construction; logistics (smaller scale owing to the size of the site) and accommodating uses associated with net zero and decarbonisation.
36	South Lancashire Industrial Estate	Ashton	90.63						Logistics; Manufacturing; Construction.	Site is mainly surrounded by green space, with some well-segregated residential areas distributed around it.	9,642	Good/moderate - Large established industrial estate with a good quality environment. Moderate access to the SRN with M6 J25 ~1.8km to the north (southbound only), while M6 J24 is 2.5km to west (northbound only), accessed via Ashton town centre, with congestion a constraint (Ashton town centre/Bryn Cross). Bryn rail station in close	Good/moderate - Site of a suitable size and location to meet market demand requirements. However, constrained access and connectivity to the SRN limits the potential future attractiveness of the site for large/higher value B2/B8 occupiers.	Large site offering a good quality environment and condition of stock could support manufacturing and construction occupiers and uses associated with net zero and decarbonisation, although limited / constrained access limits use for logistics.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
												proximity but bus routes some distance from the site.		
41	Darby Lane	Hindley	1.28						Construction.	Site is surrounded by retail and residential use but is well segregated.	974	Moderate - aged stock, in variable condition with external areas in good condition. Reasonable access to the A577 and A58, but some distance from the primary road network, though served by a number of bus routes	Moderate/Poor - small employment area in predominately residential area in need of modernisation. Access to the site relatively poor and the site is therefore better suited to local SME occupiers.	Small site with moderate access to the road network, with variable quality environment / condition buildings. Suited to smaller occupiers in the construction and manufacturing sectors.
44	Greenbank Industrial Estate	Hindley	1.68						Logistics; Construction.	Area around site is mainly residential, separated by roads.	0	Moderate - buildings from late 1970 / early 1980s in reasonable standard with some refurbished. Moderate quality external environment, access via the A577 but access to the motorway network is limited.	Moderate/Poor - small employment area in predominately residential area in need of modernisation. Access to the site relatively poor and the site is therefore better suited to local SME occupiers.	Small site with moderate access to the road network, with variable quality environment / condition buildings. Suited to smaller occupiers in the construction and manufacturing sectors.
45	Harvey Court and Bank Street	Golborne	4.67						Manufacturing; Construction; Engineering; Logistics.	Area around site is primarily residential, with a large retail space to the north.	0	Moderate - buildings range from early 1900s to modern units in variable condition, with the external environment in basic condition. Reasonable access to the A580 which is 1.3km away, and then just over to 2km to M6 Junction 23, though the site has tight access points for commercial vehicles in places; bus services accessible nearby.	Moderate - some modernisation/renovation of buildings. Reasonable access to the primary road network but constrained access at points and proximity to residential limits attractiveness of the site. Public transport accessibility potentially improved through Golborne rail station, opening in 2026.	Site with moderate access to the road network, with variable quality environment/condition buildings in proximity to a residential area. Suited to smaller occupiers in the manufacturing sector.
47	Hindley Business Centre	Hindley	2.02						Construction; Engineering; Logistics.	Site is surrounded primarily by residential buildings	170	Moderate - buildings range from post 1945 period up to present date, in variable condition and external environment in reasonable condition. Access for commercial traffic via Platt Lane is poor (via residential area) and distant from the primary road network, though there are bus routes in proximity to the site.	Moderate/Poor - small employment area in predominately residential area in need of modernisation.	Limited long-term attractiveness to core/cross-cutting sectors given site size, access and neighbouring uses.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
48	Junction Works, Bickershaw Lane	Abram	2.36						None	Site is surrounded by green space	0	Poor - buildings range from 1990s to 2010s in variable condition, with basic standard external environment supporting low amenity uses (waste management). Distant from the primary road network and away from sensitive receptors.	Poor - Poor quality site supporting low amenity uses. However, serves an important function in the local economy.	Could support lower value/amenity construction and manufacturing uses.
58	Wigan Road, Golborne	Golborne	6.52						Manufacturing; Construction; Logistics.	Site is primarily surrounded by greenspace. There are some residential buildings nearby, but they are well segregated by roads and train tracks.	0	Moderate/poor - Late 1970s and 1980 development, with buildings in good condition in a reasonable standard environment. Access a short distance from A573 Wigan Road but access to the wider primary road network/SRN and public transport is poor.	Moderate/Poor - aged stock, low quality environment in need of improvement and limited access to the wider primary road network/SRN limit attractiveness.	Site with moderate access to the road network, with aged stock offering a reasonable quality environment, constrained by rail tracks and road. Suited to smaller occupiers in the manufacturing sector.

Wigan, Ince, Standish and Orrell

8.2.15 The identified occupier typologies, business types, employment uses and land uses within the identified employment areas in Wigan, Ince, Standish and Orrell are shown in Table 23.

Table 23 Employment Areas and Uses (Wigan, Ince Standish and Orrell)

Ref	Name	Settlement	Size (ha)	Business Use/Occupier Typologies	Employment/Land Uses
16	Makerfield Way	Ince	27.84	Manufacturing; construction; wholesale; retail.	B2; B8; E(g)(iii); Sui Generis
17	Seaman Way	Ince	1.68	Manufacturing; creative industries; retail; wholesale; waste management.	B2; E(g)(i); E(g)(iii); Sui Generis.
18	Dobson Park Industrial Estate	Ince	13.75	Manufacturing; construction; motor trades; retail; logistics.	B2; E(g)(i); B8
19	Rose Bridge	Ince	8.40	Motor trades; construction; retail; wholesale; manufacturing, business services; creative industries; logistics; food & beverage; leisure; waste management	B2; B8; E(g)(iii); Sui Generis.
20	Westwood Park	Wigan	17.21	Manufacturing; professional services; waste management; health & social care; logistics; digital; creative industries.	B2; Sui Generis
21	Wigan Pier Business Park	Wigan	5.53	Manufacturing; car repair; retail; office.	B2; E(g) (i)
22	Chapel Lane	Wigan	7.15	Construction; motor trades; retail; manufacturing	B2; Sui Generis.
23	Wallgate	Wigan	17.30	Construction; manufacturing; warehousing and storage; car repairs/showroom; leisure; food & beverage.	B2; B8; E(g) (i); Sui Generis
24	Springfield and Miry Lane	Wigan	25.06	Construction; motor trades; retail; engineering; manufacturing, waste management; business services; logistics.	B2; B8; E(g)(iii); Sui Generis.
25	Martland Park and Heinz	Wigan	92.92	Manufacturing; logistics; construction; motor trades; retail.	B2; B8; E(g)(iii); Sui Generis
26	Gidlow Lane	Wigan	6.70	Manufacturing	B2
27	Bradley Lane	Standish	23.32	Construction; motor trades; manufacturing.	B2; B8; E(g)(iii); Sui Generis.
28	Richmond Hill Industrial Estate	Wigan	2.22	Construction; financial services, logistics; digital.	E(g)(i); Sui Generis.
29	Lamberhead Industrial Estate	Wigan	19.46	Construction; manufacturing; retail; engineering; logistics.	B2; B8; E(g)(iii).
30	Smithy Court and Beecham Court	Wigan	2.39	Professional services; construction; digital.	E(g)(i)
31	Warrington Road Industrial Estate	Wigan	8.34	Construction; engineering; manufacturing; logistics; motor trades; retail.	B2; B8; Sui Generis
32	Warrington Road, Hawkey	Wigan	13.55	Manufacturing; offices; petrol station; car showroom	B2; E(g)(i); E(g)(iii); Sui Generis

Ref	Name	Settlement	Size (ha)	Business Use/Occupier Typologies	Employment/Land Uses
33	Wheatlea Industrial Estate	Wigan	20.46	Manufacturing; Construction; Motor Trades; engineering; financial services; health & social care; digital	B2; B8; Sui Generis
40	Cemetery Road	Ince	6.73	Construction; manufacturing; engineering; professional services; waste management.	E(g)(iii); Sui Generis.
46	Hewitt Business Park, Winstanley Road	Orrell	1.18	Construction; retail; manufacturing; motor trades; professional services; digital; logistics.	B8; E(g)(iii); Sui Generis.
49	Kirkless Industrial Estate, New Springs	Wigan	18.05	Manufacturing; construction; motor trades; waste management; logistics	B2; B8; Sui Generis
52	Moat House Street	Ince	1.48	Hospitality/tourism; logistics; motor trades; waste management	B8; Sui Generis
55	Prescott Street	Wigan	1.11	Communications; car park; education.	B2
56	Richard Street	Ince	4.87	Construction; motor trades; manufacturing; logistics; professional; services, leisure	B2; B8; E(g)(i); E(g)(iii); Sui Generis
57	Valley Gate, Leyland Mill Lane	Wigan	0.49	Agriculture; construction; manufacturing; motor trades; personal services; gym	B2; E(g)(i); Sui Generis

8.2.16 The assessment of each existing employment area is shown in Table 24.

8.2.17 In general, there is a mixed picture across the identified employment areas. Overall, access to the primary road network and public transport tends to score good to moderately, owing to the presence of key routes such as the A49, proximity to the M6 and most sites being in proximity to established bus routes.

8.2.18 There are a number of the higher performing employment areas, such as Seaman Way (17), Westwood Park (20), Wigan Pier Business Park (21), Martland Park and Heinz (25), Lamberhead Industrial Estate (29), Smithy Court and Beecham Court (30) and Warrington Road, Hawkley (32), which are identified as having the most potential to meet the needs of Wigan's core and cross-cutting sectors.

8.2.19 Conversely, there are employment areas that perform more poorly against the identified domains, such as Cemetery Road, Ince (40), Moat House Street (52), Prescott Street (55) and Valley Gate, Leyland Mill Lane (57), with these sites viewed as not meeting the requirements of the core or cross-cutting sectors, or to support lower amenity/value uses.

Table 24 Employment Area Assessment by Domain (Wigan, Ince Standish and Orrell)

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
No.	-	-	Land area (ha)	RAG	RAG	RAG	RAG	RAG	Name	Name/Comment	Area (m ²)	Present Marketability	Medium-Long Term Marketability	Narrative
16	Makerfield Way	Ince	27.84						Manufacturing; Construction.	The site is surrounded by greenspace to the north and east, with residential buildings adjacent to some parts of the site but separated by greenspace.	481	Moderate – buildings vary in age but generally good condition and quality of the external environment is reasonable but low amenity uses (household waste recycling) on site; access to the A577 Manchester Road but, access to the motorway network and public transport is poor.	Moderate - Attractiveness potentially increased by investment to improve links to the M61. However, access to the site (congestion), and presence of low amenity uses (waste recycling) could limit future marketability	Well segregated site with good quality environment / condition of buildings. Constrained access (congestion) and presence of low amenity uses suggests the site can meet the needs of lower amenity construction and manufacturing use.
17	Seaman Way	Ince	1.68						Manufacturing.	Site is surrounded by greenspace, with residential buildings west of the site.	0	Good - post-2010 buildings in good condition/quality environment. Good access to the A577 Manchester Road but access to the motorway network, subject to congestion, is poor. Bus and rail services (Ince) accessible nearby.	Good - small employment site in good condition, well served by public transport. Size of site and moderate access to motorway network limits attractiveness to large occupiers and therefore better suited to local SME occupiers. .	Good quality site with moderate access suited to smaller occupiers in the manufacturing and construction sectors.
18	Dobson Park Industrial Estate	Ince	13.75						Manufacturing; Construction; Logistics.	The site is surrounded by residential buildings, with two primary schools west of the Site.	3,529	Good/moderate - properties typically date from the 1970s to the 2000s, in good condition, with the quality of the external environment functional. Accessed from the A577 but access to the motorway network is poor, though the site is well served by public transport (bus and rail)	Good/moderate - A large and well established employment area in Ince, accessed from the A577 Manchester Road and well served by public transport. Proximity to sensitive receptors could limit attractiveness for industrial occupiers in the north/west of the site.	Large site offering a reasonable quality environment could support manufacturing and construction occupiers, as well as accommodating uses associated with net zero and decarbonisation, although limited access to the SRN could deter use for logistics.
19	Rose Bridge	Ince	8.4						Construction; Manufacturing, Logistics.	The site is primarily surrounded by residential buildings, with a secondary school to the north, separated by two roads.	6,368	Moderate - Building age and condition and the quality of the external environment varies across the site. Good access on to the A577 Manchester Road but access to the motorway network is poor, and moderate access to public transport (bus).	Moderate - some modernisation/renovation of buildings and external environment required and limited access to the motorway network limits attractiveness of the site for larger occupiers	Reasonable quality site could support manufacturing and construction occupiers, as well as accommodating uses associated with net zero and decarbonisation, although limited access to the SRN could deter use for logistics.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
20	Westwood Park	Wigan	17.21						Manufacturing; Health & Social Care; Logistics; Digital.	Site is predominantly surrounded by greenspace, with some commercial / retail buildings around the site.	582	Good - Modern standard site with good quality environment. Access to the enhanced Westwood Way which connects to the A49, thereon to M6 J25, however poor access by public transport.	Good - Large, well located site with good access to the SRN well suited to meet future growth requirements across a number of sectors. Attractiveness potentially increased by investment to improve links to the M61.	Site size, access to primary road network / motorway and quality of environment could support use for manufacturing; transport and logistics and health and social care, as well as accommodating uses associated with net zero and decarbonisation.
21	Wigan Pier Business Park	Wigan	5.53						Manufacturing.	The site is a mix of office and industrial uses. The west of the site is adjacent to residential buildings, separated by a road.	1,042	Good - variety of buildings on the site ranging from 1970/80s industrial units to post 2000 new build offices, generally in good condition with a good quality environment. Direct access onto the A49, with M6 Junction 25 2.7 miles away. Well served by public transport (bus/rail).	Good - Modern business park with a variety of business and manufacturing uses located to the south of Wigan town centre, with good connectivity.	Medium-sized, segregated site with good access and good quality environment / condition buildings. Well suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses associated with net zero and decarbonisation. Environment and connectivity could meet the needs of smaller businesses and start-ups in digital/health and social care.
22	Chapel Lane	Wigan	7.15						Construction; Manufacturing.	The site is primarily industrial and commercial, with some residential flats towards the south-west of the site.	1,665	Moderate/Poor - a wide variation of aged stock of basic standard, in a low amenity environment. However, the site provides good access to the A49, and M6 Junction 25, and is well served by public transport (bus/rail).	Good/moderate - poor quality site, in need of modernisation in places. However, strong access to primary road network and via public transport could be attractive to a variety of users with suitable modernisation.	Due to site size and good access to the primary road network, the site could support manufacturing and transport and logistics, while public transport and access to Wigan town centre could support E(g)(i) uses and therefore sectors such as digital, with required modernisation
23	Wallgate	Wigan	17.3						Construction; Manufacturing; Logistics.	The site is predominantly industrial and commercial, with sparsely distributed residential buildings around the site.	517	Moderate - building age and condition and the quality of the external environment varies across the site. Good access to the A577, connecting to the A49 and M6, and well served by public transport (bus/rail). Constrained due to proximity to West Coast	Moderate - A large, well established employment area on the edge of Wigan town centre, requiring some modernisation to stock/environment, supporting a variety of uses (particularly SMEs) and offering good accessibility.	Large site with access to primary road network / public transport could meet the needs of the manufacturing and construction sectors. Constrained access - only south on the A577 Wallgate as otherwise being wrapped around by railways (the West Coast Mainline and the Wigan-

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
												Mainline and the Wigan-Kirkby line.		Kirkby line) could deter transport and logistics.
24	Springfield and Miry Lane	Wigan	25.06						Construction; Engineering; Manufacturing, Logistics.	Site is adjacent to residential buildings, mainly towards the north and east.	4,574	Moderate/poor - The age and condition of properties vary across the site, with the quality of the external environment generally poor. Access severely constrained to the primary road network. A number of bus services are nearby, with pedestrian links to the town centre.	Moderate/Poor - aged stock, low quality environment in need of improvement and site constraints/limited access to primary road network limit attractiveness, particularly for larger occupiers.	Low quality site with constrained access may meet the needs of smaller, lower amenity/value occupiers in the construction and manufacturing sectors.
25	Martland Park and Heinz	Wigan	92.92						Manufacturing; Logistics; Construction.	Residential buildings surround the south of the site, separated by greenspace and roads.	5,232	Good/moderate - Modern industrial estate setting, with properties of a variety of ages in good condition, with good quality environment (roads, footways, trees and areas of landscaping). However, despite physical proximity to the M6, access to the motorway network and wider primary road network is convoluted and therefore only moderate. A number of bus routes serve the site.	Good/moderate - Site of a suitable size and location to meet market demand requirements across a range of sectors. Improved access to the strategic road network would increase its market attractiveness.	Modern, site in good condition with reasonable access to the primary road network. Well suited to a range of uses including construction, manufacturing and logistics, as well as accommodating uses associated with net zero and decarbonisation.
26	Gidlow Lane	Wigan	6.7						Manufacturing.	Residential buildings surround the Site, with greenspace to the north.	0	Moderate - sole occupier site with aged, refurbished buildings of a moderate standard with a good quality external environment. Poor access to the primary road network, with moderate access by public transport (bus).	Moderate - single factory site in sole ownership and use for manufacturing purposes.	Currently supports manufacturing (sole occupier) but surrounding uses/building age and access not conducive to modern manufacturing site.
27	Bradley Lane	Standish	23.32						Construction; Manufacturing.	Site is mainly surrounded by greenspace, with some sparsely distributed residential buildings around it.	4,515	Moderate - properties' age and condition vary across the site, with the quality of the external environment generally basic, with significant amounts of open storage/scrap uses. Poor access to the primary road network and motorways, with constrained access	Moderate/Poor - variable age/quality of stock, basic environment supporting lower amenity uses and site constraints/limited access to primary road network limit attractiveness, particularly for larger occupiers.	Suited to lower value/amenity construction and manufacturing use.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness	Suitability for meeting needs of core/cross-cutting sectors	
												via a very low and narrow underbridge, though moderately served by public transport.		
28	Richmond Hill Industrial Estate, Pemberton	Wigan	2.22						Construction; Logistics; Digital.	Site is surrounded by residential properties.	680	Moderate - buildings of a range of ages, generally in poor condition, with the quality of the external environment generally basic. Access is good with the site close to A577 Ormskirk Road and 1.2 km from M6 Junction 26 (M58 interchange), though only moderately served by public transport.	Moderate - small employment site of variable age and poor quality of stock, in a basic environment supporting lower amenity uses. Good access to the primary road network but size likely to limit attractiveness, particularly for larger occupiers.	Suited to lower value/amenity construction and manufacturing use.
29	Lamberhead Industrial Estate	Wigan	19.46						Construction; Manufacturing; Engineering; Logistics.	Site is surrounded by residential properties.	7,093	Good/moderate - Large employment area with variable building age/quality in an established business park location with reasonable external environment; M6 J26 / M58 nearby but difficult to access (2km via Enfield St and A577). Well connected to public transport.	Good - Some modernisation required but site could benefit from M58 link road, which would provide direct access, which could increase future marketability, including for larger occupiers.	Large site with good primary road access but with an external environment and building conditions of variable quality. Suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses associated with net zero and decarbonisation.
30	Smithy Court and Beecham Court	Wigan	2.39						Construction; Digital.	Site is well segregated, with some residential properties to the south.	267	Good - site fully built out in past 15-20 years with buildings in good condition and high quality external environment. Access to the A49 is good and within 3km of the motorway (M6 J25), and reasonably well served by public transport.	Good - small, relatively modern employment park, with good access to the surrounding primary road network. Access to M6 Junction 26 (all-ways) will be significantly enhanced on completion of the M58 Link Road, boosting the site's marketability.	Modern, fit-for purpose environment with good access to the primary road network well suited to a range of E(g)(i) uses including digital, health and social care, construction (contractor/services).
31	Warrington Road Industrial Estate	Wigan	8.34						Construction; Engineering; Manufacturing; Logistics.	Adjacent to residential buildings to the east, with greenspace to the south.	2,864	Moderate - variable building age/quality in an established location with reasonable external environment. Close, if constrained, access to the A49, with Junction 25 of the M6 Motorway 2.2kms to the south, moderate access by public transport (bus).	Moderate - some modernisation/renovation of buildings, and improvement to the external environment required. Reasonable access to the primary road network but constrained access in proximity to residential	Reasonable quality site could support manufacturing and construction occupiers, as well as accommodating uses associated with net zero and decarbonisation, although constrained access to the primary road network/motorway could deter use for logistics.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
													limits attractiveness of the site.	
32	Warrington Road, Hawkey	Wigan	13.55						Manufacturing.	Site is predominantly surrounded by residential properties, with greenspace to the south.	0	Good - Established industrial estate with buildings of variable age but generally modern standard, with good quality internal roads, parking, and reasonable landscaping. Direct access to A49 Warrington Road southbound but northbound more convoluted; 0.5km north of J25 M6 however, access from J25 is constrained by the lack of a direct right turn into and from the site northbound. A number of bus routes serve the site.	Good - Site of a suitable size and location to meet market demand requirements. However, constrained access and connectivity to the SRN limits the potential future attractiveness of the site for larger B2/B8 occupiers.	Well-proportioned and reasonably well connected site in an established, good quality industrial estate could support manufacturing and construction occupiers, as well as accommodating uses associated with net zero and decarbonisation. Constrained access the primary road network/motorway could deter use for logistics.
33	Wheatlea Industrial Estate	Wigan	20.46						Manufacturing; Construction; Engineering; Health & Social Care; Digital.	Site is well segregated, with some residential properties to the west	867	Moderate/good - 1970s/80s stock in good condition, with good quality external environment. Direct access to the A49 Warrington Road 700 metres north of M6 Junction 25, with moderate access to bus services.	Good - Site of a suitable size and location to meet market demand requirements, with good access to the primary road network attractive to larger B2/B8 occupiers. May require some modernisation. A potential future road connection to the Places for Everyone employment allocation to the south could enhance vehicular access to M6 J25 and increase market attractiveness.	Large, segregated site with good access and good quality environment / condition of buildings well suited to a variety of sectors including manufacturing; transport and logistics; and construction, as well as accommodating uses associated with net zero and decarbonisation.
40	Cemetery Road	Ince	6.73						Construction; Manufacturing; Engineering.	Site is surrounded by greenspace.	0	Poor - aged stock of variable quality in a low quality environment with open storage. Close to the A573 but has poor access to the primary road network and motorways, and not served by public transport.	Poor - Poor quality site supporting low amenity uses. However, serves an important function in the local economy	Could support lower value/amenity construction and manufacturing uses.
46	Hewitt Business Park,	Orrell	1.18						Construction; Manufacturing; Digital; Logistics.	Site is adjacent to residential properties to the south and west,	867	Moderate/good - small site comprising late 1990s to early 2000s stock in reasonable condition, with	Moderate - Established mixed employment area providing a range of property sizes which are	Small relatively modern site, with variable quality environment/condition buildings well served by

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
	Winstanley Road									with greenspace to the east.		reasonable quality external environment. 1.6km from the nearest primary road (A577 Orrell Road) with motorway (M58/M6) access a further 0.5km, and well served by public transport (bus/rail).	generally in reasonable to good condition, and benefits from good access connectivity. However, access constraints and overall size will limit attractiveness for some, particularly larger occupiers.	public transport with moderate access to the primary and strategic road network. Suited to small scale light industrial (manufacturing) and E(g)(i) uses such as digital and health and social care.
49	Kirkless Industrial Estate, New Springs	Wigan	18.05						Manufacturing; Construction; Logistics	Greenspace to the east, with residential properties adjacent to the site in the west.	4,313	Moderate/poor - large employment area with variable building age/quality/external environment. Access to an A road and the motorway network is poor, and poorly served by public transport. Heavily constrained site due to its historic uses and is primarily an area for low amenity uses. The area has access via a Grade II Listed single carriageway canal bridge through a residential area to a B road and then on to the wider road network.	Poor - Poor quality site supporting low amenity uses. However, serves an important function in the local economy.	Could support lower value/amenity construction and manufacturing uses.
52	Moat House Street	Ince	1.48						Logistics	Residential buildings adjacent to Site.	902	Moderate/Poor - generally aged stock in poor condition, with a basic external environment, supporting low amenity uses (e.g. scrap yard; bus storage). Directly accessed from the A577, and reasonably served by public transport (bus). Poor access to the strategic road network.	Moderate/Poor - Small, poor quality site supporting low amenity uses. However, serves an important function in the local economy.	Could support lower value/amenity construction and manufacturing uses.
55	Prescott Street	Wigan	1.11						-	Residential buildings surrounding the site.	0	Moderate/Poor - Aged buildings, mostly in poor condition, and moderate/fit-for-purpose external environment. Isolated site bordered by residential property and railways.	Moderate/Poor - Small, poor quality, constrained site with limited marketability	Access and site size limits suitability for the core and cross-cutting sectors.

Ref	Name	Settlement	Size	Public Realm, Environment and Surroundings	Building Age	Building Condition	Primary road network / motorway Access	Public Transport Access	Presence of core/cross cutting sectors?	Compatibility of surrounding land uses	Vacant Floor-space	Market Attractiveness		Suitability for meeting needs of core/cross-cutting sectors
56	Richard Street	Ince	4.87						Construction; Manufacturing; Logistics.	Residential buildings are distributed around the site, with a primary school a few roads to the east.	8,252	Moderate/Good – Properties vary in age but typically date from the 1980s up to 2000s, in well-maintained condition and a functional external environment. Direct access from the A573 Warrington Road, and well served by public transport (bus/rail). Bounded by rail tracks to the south and northwest and residential areas to the east and north east.	Good/moderate – Site requires some modernisation but reasonably well located and proportioned to meet market demand requirements across a range of sectors.	Reasonable quality site with moderate access suited to a variety of sectors including manufacturing and construction.
57	Valley Gate, Leyland Mill Lane	Wigan	0.49						Construction; Manufacturing.	Site is well segregated with greenspace surrounding it.	46	Moderate/Poor – generally aged stock in poor condition, with a basic external environment (though surrounding areas higher quality), supporting low value uses. Nearby access to the A49 but constrained (poor turning in/out and at an acute angle), and reasonably served by public transport (bus).	Moderate/Poor – Small, low quality site supporting lower value uses. Size and site access limit marketability.	Access and site size limits suitability for the core and cross-cutting sectors.

8.3 Assessment of employment land supply sites with planning permission

8.3.1 There are seven sites within the employment areas, or sites which are allocated in the Places for Everyone Plan, that have planning permission for employment development. These equate to a total of 93.8 hectares of employment land, and on completion would deliver around 238,914 m² of additional employment floorspace in the borough. An assessment of these sites, including their alignment with current and future market demand, and details of their extant planning approvals are set out in Table 25. Maps of these sites are shown in Appendix A together with the employment land sites without planning permission identified in Section 8.4.

Table 25 Assessment of employment land supply sites with unimplemented planning permission

Ref	Site address	Site area (ha)	Gross floorspace (m ²)	App no.	Description of proposed development	Approved	Suitability for core/ cross cutting sectors
9	Land at Chaddock Lane, Astley	12.71	32,826	A/23/96226	Development of warehousing units (Use Class B2/B8) - including ancillary integral office space (Use Class E(g))	11/06/24	Manufacturing, Transport and Logistics
14	Hindley Green Business Park, Leigh Road	2.38	5,444	A/22/94796	Redevelopment of site to provide 17 Class B2/B8 industrial units (5,444m ²) and 2 Class E (B) Drive Thru restaurants (2x 232m ²), etc	15/09/23	Manufacturing, Transport and Logistics, Construction
16	Makerfield Way, Ince (Plot 1)	2.18	7,623	A/23/95817	Erection of a new warehouse (B8) with ancillary office accommodation, light manufacturing (E(g)iii)	08/02/24	Manufacturing, Transport and Logistics, Construction
25	Martland Park and Heinz (Plot 2)	2.99	10,500	A/22/93842 (Outline)	Outline planning application with all matters reserved except for access, for a proposed commercial building (Use Class B2/B8 with ancillary office space)	09/03/23	Manufacturing, Transport and Logistics
32	Warrington Road, Hawkley (Plots 2 and 3)	3.9	10,492	A/21/90935 (Full); A/23/95286 (Variation of condition)	Demolition of the existing 4 no vacant office buildings and the erection of employment development (Use Class B2 and B8), comprising new buildings, vehicle access from Glass House Road and	13/05/22 (Full); 23/01/24 (Variation of condition)	Manufacturing, Transport and Logistics

Ref	Site address	Site area (ha)	Gross floorspace (m ²)	App no.	Description of proposed development	Approved	Suitability for core/ cross cutting sectors
					Warrington Road, etc.		
36	South Lancashire Industrial Estate extension, Ashton (Plot 1)	14.51	58,064	A/21/92036 (Outline)	Erection of up to 58,064m ² (GIA) of industrial, storage and distribution floorspace with ancillary offices (Use Classes B2, B8 and E(g)).	31/01/23	Manufacturing, Transport and Logistics
JPA 31	Land at M6 Junction 25 (Plot 1)	54.41	113,965	A/18/85947 (Hybrid)	Full planning permission for the erection of 27,871m ² of employment floorspace (Use Class B8 with ancillary E(g)(i)), comprising two units and the provision of associated infrastructure including access etc. Outline planning permission for the erection of up to 106,095m ² of employment floorspace (Use Class B8 with ancillary E(g)(i)).	21/06/21	Transport and Logistics
		93.08	238,914				

- 8.3.2 Whilst their recent approval would suggest that there is current demand for employment development on these sites, recent and past experience indicates that there is a possibility that some may not come forward, or be developed in different quantities than has been consented. Whilst each of the approved sites aligns with at least one of the core or cross cutting sectors, with the exception of the site at M6 Junction 25, it is not anticipated that these will deliver economic development that is transformational to the borough's economy, due to factors such as their scale, location and constrained access to the strategic road network.

8.4 Assessment of employment land supply sites without planning permission

- 8.4.1 A number of employment areas, and other sites which are allocated in the Places for Everyone Plan, are identified as having land available for development that is not the subject of an active, planning permission. The assessment of each of these areas, based on their alignment with current and future market demand, is set out in Table 26.
- 8.4.2 The multicriteria analysis highlights that, despite access to the primary road network and the motorway network being a key driver for Wigan Borough's core and cross cutting sectors, in particular transport and logistics and manufacturing, relatively few of the borough's vacant sites score strongly across this

- domain. Indeed, given size constraints, only Westwood Park (20) and Land at M6 Junction 25(JPA 31) are identified as meeting the needs of the transport and logistics sector.
- 8.4.3 Similarly, few sites offer good access to public transport, which could limit the attractiveness by E(g)(i) occupiers in sectors such as digital, health and social care, with only West of Gibfield offering alignment with these needs.
- 8.4.4 The assessment does identify some sites, including those located within the Wigan-Bolton Growth Corridor such as Gibfield (12), Westwood Park (20), Martland Park/Heinz (25), as having the attributes to support employment expansion in the manufacturing sector, particularly for food manufacturing as referenced in paragraph 7.2.4.
- 8.4.5 In regard to the sites' suitability to accommodate uses associated with net zero and decarbonisation, only a small number of sites are identified as having the right attributes, including Westwood Park (20), South Lancashire Industrial Estate extension (36), Land at M6 Junction 25 (JPA31) and West of Gibfield (JPA34).
- 8.4.6 Overall, despite some higher quality sites that demonstrate relatively strong marketability, such as Westwood Park (20), Warrington Road, Hawkey (32), South Lancashire Industrial Estate extension (36), and Land at M6 Junction 25 (JPA 31), few of the vacant sites score strongly across multiple domains.
- 8.4.7 Furthermore, it is evident in the analysis that a significant number of the vacant sites in the borough's existing employment areas have been vacant for a number of years (excluding the allocations in the Places for Everyone Plan). Many of these sites have identified barriers to development ranging from land ownership to remediation and viability constraints which may have contributed to the lack of employment land take-up in the borough recorded over a number of years. Indeed, employment land take up across the borough averaged just 2.7 ha per annum from 2011/12 to 2023/24. Of a total of 35.36 ha of employment land take up during this 12 year period, 21.34 ha (60%) was developed in just one year (2016/17) across 3 sites (2 at South Lancashire Industrial Estate and one at Westwood Park). The annual average take up in the other years equates to only 1.27 ha per year.
- 8.4.8 Taken together, the analysis of vacant sites highlights that the available employment land in Wigan Borough currently lacks the quality profile to align with current and future market demand, or is subject to constraints that could limit its potential for development.

Table 26 Assessment by domain of employment land supply sites without planning permission

Ref	Name of employment area or PFE Plan allocation	Site area	Public Realm, Environment and Surroundings	Primary road network / motorway Access	Public Transport Access	Compatibility of surrounding land uses	Market Attractiveness			Barriers to delivery/development	Suitability for meeting needs of core/cross-cutting sectors
No.	Name	Hectares	RAG	RAG	RAG	Sensitive uses	Marketing History (time vacant, marketing effort)	Present Marketability	Medium-Long Term Marketability	Physical constraints to development (topography for example), existing buildings/temporary uses on site, remediation works, land ownership.	Narrative
12	Gibfield	0.81				None	Site is being marketed (onsite boards have been in place for some years). Vacant for more than 10 years.	Vacant land in established business park location, with good/moderate quality environment and access by road/public transport.	Suitably located site to meet future growth requirements across a number of sectors. Attractiveness potentially increased by planned investment to improve links to the M61.	None apparent	Quality environment; access, lack of sensitive uses and site size could support manufacturing while these factors, and proximity to Leigh Infirmary and RBH/WBG could support health and social care.
15	Swan Lane	0.83				Residential (opposite road)	Vacant for a number of years	Established business park location with reasonable quality environment and surroundings, with access to the A577 0.6kms to the south (SRN access limited), served by a single bus route. Much of the original site lost to car parking/SUDS, with a narrow strip remaining which limits its attractiveness.	Constrained layout (narrow) and access (road/public transport) could limit future marketability	Land ownership – lack of engagement from owner Layout – narrow strip of land.	Quality environment; access and site size could support manufacturing use.
16	Makerfield Way (Plot 2)	0.78				None	Vacant for ~20 years	Quality of the external environment is reasonable but low amenity uses (household waste recycling) on remainder of the site; Direct access to SRN, constrained by congestion; access by public transport is poor.	Attractiveness potentially increased by planned investment to improve links to the M61. However, vacant for a significant amount of time. Future marketability limited by access to the site (congestion), presence of low-value amenity uses in proximity (waste recycling) and barriers to development.	Identified as additional capacity for waste recycling by the Council (owner of the land).	Well segregated site with good quality environment and condition of buildings. Constrained access (congestion) and presence of low amenity uses suggests the site can meet the needs of lower amenity construction and manufacturing use.
20	Westwood Park	4.8				None	Vacant for ~20 years	Good quality environment, with significant screening, in proximity to the Nice Pak manufacturing factory. Access to the enhanced Westwood Way which connects to the A49, thereon to J25 M6. Constrained to the east by the WCML and no access by public transport.	Suitably located site to meet future growth requirements across a number of sectors. Attractiveness potentially increased by investment to improve East-West links to the M61 and M58.	Remediation/viability – former power station site Environment – biodiversity value	Site size, access to primary road network/motorway and quality of environment could support Manufacturing / Transport and Logistics / Health and Social Care, as well as accommodating uses associated with net zero and decarbonisation.
25	Martland Park and Heinz (Plots 1 and 3)	3.73 (comprising two plots of 1.6ha and 2.13ha)				None	No recent planning history (2000 onwards)	Site in a modern industrial estate setting, with good quality environment (roads, footways, trees and areas of landscaping). Despite physical proximity to the M6, access to the motorway	Site of a suitable size, layout and location to meet market demand requirements.	None apparent	Established modern industrial setting with good quality environment and reasonable access, alongside site size and layout, likely to attract manufacturing use.

Ref	Name of employment area or P/E Plan allocation	Site area	Public Realm, Environment and Surroundings	Primary road network / motorway Access	Public Transport Access	Compatibility of surrounding land uses	Market Attractiveness		Barriers to delivery/development	Suitability for meeting needs of core/cross-cutting sectors	
								network and wider primary road network is only moderate. Bus routes serve Heinz and adjacent areas to the employment area			
32	Warrington Road, Hawkey (Plot 1)	0.59				None	Vacant for a number of years	Site with prominent frontage on an established industrial estate, Direct access to A49 Warrington Road southbound but northbound more convoluted; 0.5km north of J25 M6 however, access from J25 is constrained by the lack of a direct right turn into and from the site northbound. A number of bus routes serve the site. Permission granted for erection of 4 Use Class B8 trade counter uses in 2015, since lapsed.	Site of a suitable size and location to meet market demand requirements. However, constrained access to the SRN limits the potential future attractiveness of the site, particularly for large B2/B8 occupiers.	Land ownership – alternative use sought by owner	Well-proportioned and reasonably well connected site in an established, good quality industrial estate could support manufacturing and construction occupiers.
36	South Lancashire Industrial Estate extension, Ashton (Plot 2)	19.5				None. The adjacent plot to the east has planning permission for employment uses.	Allocated for 25-30 years but remains vacant.	Mostly greenfield site in an established industrial estate with good quality environment. Moderate access to the SRN with M6 J25 ~1.8km to the north (southbound only), while M6 J24 is 2.5km to west (northbound only), accessed via Ashton town centre, with congestion a constraint (Ashton town centre/Bryn Cross). Bryn station in close proximity but bus routes some distance from the site.	Site of a suitable size and location to meet market demand requirements. However, constrained access and lack of connectivity to the SRN means it is not a prime location for large scale B2/B8 occupiers. However, there are some existing major B8 occupiers on the industrial estate.	Remediation/viability - former coal mine	Well-proportioned and reasonably well connected site in an established, good quality industrial estate could support manufacturing and construction occupiers, as well as accommodating uses associated with net zero and decarbonisation. The site could also meet the needs of transport and logistics occupiers, particularly if existing access constraints could be resolved.
JPA3 1	Land at M6 Junction 25 (Plot 2)	6.2				The land to the south and west has planning permission for B8 uses, in accordance with Policy JPA 31 of the Places for Everyone Plan. Employment uses, hotel and restaurant to the north.	The site was located in the Green Belt until the adoption of the Places for Everyone Plan in March 2024, and now forms part of a site allocation for employment development. Vast proportion of the remainder of the allocation has planning permission for B8 development.	The available land is in the north west corner of the Places for Everyone site allocation with a frontage onto A49 Warrington Road. Vehicular access into the site is envisaged via a road link to the adjacent approved employment development on the remainder of the P/E site allocation which will provide direct access to M6 J25 from an additional arm on the A49/M6 roundabout (Bryn interchange). Well served by bus services on a high frequency bus route.	Site is ideally located (offering connectivity to the SRN) to meet market demand requirements.	Unless an access can be achieved directly on to the A49, vehicular access to the site is likely to be dependent on the delivery of road infrastructure proposed as part of the approved employment development on the adjacent site. This is anticipated to be completed in the short to medium term.	Direct access to primary road network and motorway could support transport and logistics and manufacturing occupier(s) as well as accommodating uses associated with net zero and decarbonisation.

Ref	Name of employment area or PFE Plan allocation	Site area	Public Realm, Environment and Surroundings	Primary road network / motorway Access	Public Transport Access	Compatibility of surrounding land uses	Market Attractiveness			Barriers to delivery/development	Suitability for meeting needs of core/cross-cutting sectors
JPA3 3	Pocket Nook	3.75				Residential	Historic outline application for B1/B2 employment uses refused permission in 1990, due to being protected open land at that time.	Greenfield site in an urban fringe location, with 15,000m ² earmarked for employment uses, principally served from a new junction on the A579 Atherleigh Way, with a new link road, running east to west through the site to serve both new housing and employment development, accommodating bus services. Indirect connectivity to the A580 and M6 J23 ~3.5 miles from the site.	Site of a suitable size and location to meet market demand requirements.	Land ownership - lack of engagement from owner	Site size, access to primary road network could support small-scale manufacturing.
JPA3 4	West of Gibfield	11.4				Residential; green space	-	Greenfield site, the south of which is earmarked for employment uses (45,500m ²), close to the established Gibfield site. Access to the A577 Wigan Road and A579 Atherleigh Way, with improved road infrastructure between Gibfield Park Way to Junction 5 of the M61 set to offer a link to the SRN.	Site of a suitable size and location to meet market demand requirements. Attractiveness potentially increased by planned investment to improve links to the M61.	Remediation/viability - former coal mine Environment - biodiversity	Links to Manchester (M61/Manchester to Southport Line) could support E(g)(i)/(ii) uses (digital/creative and health innovation/life sciences). Could also support manufacturing; health and social care (proximity to Leigh Infirmary and RBH; Wigan Bolton Growth Corridor) as well as accommodating uses associated with net zero and decarbonisation.

8.5 Conclusion

- 8.5.1 The assessment set out within this section has highlighted that, although there is evidence of higher performance, Wigan Borough's existing employment areas and available employment sites demonstrate variable alignment with current and future market demand, and the requirements of the borough's core and cross cutting sectors, as established in Section 7.

Existing Employment Areas

- 8.5.2 The assessment has highlighted that the larger and higher performing employment areas in industrial use tend to be located with direct or indirect access to the strategic road network or other main arterial routes (such as the M6, A580 and A49), with employment areas less well connected to the road network often being smaller, offering older / poorer quality buildings and limited formal public realm.
- 8.5.3 Outside of the main town centres, office space tends to be provided alongside other industrial uses in business park settings and industrial estates, mainly comprising spaces ancillary to industrial uses with small amounts of standalone commercial office space.
- 8.5.4 Within the existing employment areas, there is evidence of alignment with the current and future requirements of the borough's core and cross-cutting sectors at the following locations:
- Hope Carr/Leigh Commerce Park (8) and Gibfield (12) in the Atherton, Leigh and Tyldesley area.
 - Stone Cross Park (1), Golborne Enterprise Park (2), Newton Road (4), Moss Industrial Estate (5), Land Gate (34) and South Lancashire Industrial Estate (36), in the Hindley, Abram, Golborne and Ashton-in-Makerfield area.
 - Seaman Way (17), Westwood Park (20), Wigan Pier Business Park (21), Martland Park and Heinz (25), Lamberhead Industrial Estate (29), Smithy Court and Beecham Court (30), Warrington Road, Hawkley (32) and Wheatlea Industrial Estate (33), in the Wigan, Ince, Standish and Orrell area.
- 8.5.5 It is evident from the assessment that many of the existing employment areas are well occupied, with low vacancy rates, despite offering limited (moderate to poor) marketability linked to their size, location, overall quality of environment and quality/condition of building stock. While this may point to a relative undersupply of suitable quality sites in the borough, it is likely that many of these existing employment areas can and will continue to accommodate the needs of existing occupiers and churn/expansion within the market, including in the identified core and cross-cutting sectors (particularly smaller-scale or lower value/amenity uses). However, these sites would be unlikely to attract larger or higher value occupiers across Wigan's core and cross-cutting sectors and deliver against Wigan's growth aspirations, owing in many cases to their size, layout and location. For instance, the analysis in Section 7 highlighted the requirement for large manufacturing or logistics occupiers to have good access to the primary and/or strategic road network, with suitably proportioned and shaped sites that can offer high-grade floorspace, which is lacking in the vast majority of existing employment areas. Furthermore, constraints around viability are likely to constrain efforts to sufficiently refurbish or renovate many of these sites to meet the needs of new, modern occupiers.

Employment land supply sites without planning permission

- 8.5.6 In relation to the employment land supply sites without planning permission in Wigan Borough, the analysis highlights that, despite some higher quality sites that demonstrate relatively strong marketability, such as Westwood Park (20), Warrington Road, Hawkley (32) and the unpermitted part of Land at M6 Junction 25 (JPA31), which are better placed to support current and future market requirements for the borough's core and growth sectors, few of the vacant sites score strongly across multiple domains. Taken with evidence of development constraints and limited site activity or developer interest, the analysis of vacant sites highlights that the available employment land in the borough currently lacks the quality profile to align with occupants' likely requirements, or is subject to constraints that could limit its potential for development. The extremely low employment land take up rates in the borough over the past 10-15 years compels this case, particularly in comparison to higher rates of take up achieved in neighbouring districts over this period.
- 8.5.7 Taken together, the analysis of existing employment areas and available sites highlights a mismatch between the supply of employment land in Wigan Borough and the requirements of its core and cross-cutting sectors. This is considered to be constraining the ability to secure and attract businesses to the

local area to help meet local growth aspirations. As such, this potentially necessitates the allocation of additional sites, or replacement of sites, that provide opportunities for developers to bring forward new floorspace that meets the needs of modern occupiers, particularly within the identified core and cross cutting sectors – in terms of quality, accessibility, typology, and size – to improve the borough’s economic performance.

9. Future Floorspace and Land Requirements

9.1 Introduction

9.1.1 The approach to assessing future employment floorspace and land requirements below is in line with Planning Practice Guidance on Economic Needs Assessments. The analysis in this section considers a range of future employment growth scenarios, including:

- Scenario 1: Labour Demand – based on the land needed to accommodate expected employment growth in the borough, as per the latest employment forecasts from Experian.
- Scenario 2: Past Trends – trend-based scenario based on the continuation of historical net absorption rates, sourced from CoStar. This analyses the net absorption of floorspace – i.e. the quantum of net floorspace occupied over a period of time (i.e. move-ins minus move-outs) based on lease deals, a proxy measure of demand – by use class over the period 2013-2022 and extrapolates these trends over the assessment period.
- Scenario 3: Policy On – the employment levels that could be possible, in line with Wigan Council's aspirations to create a more inclusive economy, that creates a high-quality place to live, work, invest and visit. This applies adjustments to the employment forecasts under Scenario 1, based on improvements to Infrastructure; Labour Availability and Skills; and Environment across the borough.

9.1.2 Employment sectors have been mapped to the current core B and E(g) use classes:

- Office uses (former B1a, B1b):
 - E(g)(i) Offices;
 - E(g)(ii) Research and development;
- Industrial uses (former B1c, B2, B8):
 - E(g)(iii) Light industrial;
 - B2 General industrial;
 - B8 Storage or distribution.

9.1.3 Job numbers for each use class have been calculated, and then converted to floorspace and requirements by applying appropriate employment density assumptions. The employment densities and plot ratios used draw on the HCA Employment Densities Guide 3rd Edition (2015). These employment density and plot ratio assumptions are summarised in Table 27 below.

Table 27 Employment density and plot ratio assumptions

Use class	HCA Employment Density Guide (2015)	Employment density assumption used (m ² per full-time equivalent (FTE) job)	Plot Ratio (% of site area)
E(g)(i)	Offices – 8-13 m ² NIA per FTE job	11.3	100%
E(g)(ii)	R&D space – 40-60 m ² NIA per FTE job	50	40%
E(g)(iii)	Light industrial – 47 m ² NIA per FTE job	47	40%
B2	Industrial & Manufacturing – 36 m ² GIA per FTE job	36	40%
B8	Storage & Distribution – 70-95 m ² GEA per FTE job	95	45%

Source: *Employment Densities Guide 3rd Edition (2015)*

- 9.1.4 It should be noted that employment ratios and plot ratios can vary significantly depending on location and the exact type of use. The HCA Employment Densities Guide allows for this by providing density ranges against uses. This study has taken a mid-point approach to applying these ranges. The exception to this is for B8 uses where an average density towards the lower end of the HCA Employment Densities Guide has been applied – reflecting the density ascribed to national distribution hubs (rather than regional hubs or final mile distribution uses, which are generally of lower employment density per m² of space). This is considered appropriate for Wigan Borough, given the nature of historic and more recent storage and distribution development within the borough.
- 9.1.5 All scenarios discussed in this chapter should be treated as broadly indicative. Predicting future economic trends and corresponding employment land requirements is not an exact science. The assessment is based on a series of assumptions, including the future performance of individual business sectors, the proportion of employment in each sector that corresponds to each of the use classes, and the future employment densities and plot ratios for each use class. Furthermore, the future performance of Wigan Borough's economy is subject to external factors that are hard to predict, such as political and economic changes at the national and international levels.
- 9.1.6 With the above caveat in place, the scenarios presented in this chapter provide an indication of future economic trends and are a useful tool for informing employment land policy. It should also be noted that all figures presented in this chapter have been rounded and therefore may not completely add up.

9.2 Scenario 1: Labour Demand Scenario

- 9.2.1 The Labour Demand scenario considers the land needed to accommodate expected employment growth in the borough, as per the latest employment forecasts from Experian. This is undertaken by mapping the employment forecasts by sector to the employment land use class, converting to floorspace requirements using employment densities and thereafter to land requirements by applying plot densities to the floorspace calculations.
- 9.2.2 According to Experian's June 2023 employment forecasts, full time equivalent (FTE) employment across all sectors in Wigan Borough is forecast to increase from 89,800 in 2023 to 92,300 in 2040, an increase of approximately 2.8%. The biggest growth sectors in terms of absolute number of FTE employment growth are Administrative & Support Services (+2,600 FTEs), Wholesale (+1,000 FTEs) and Professional Services (+700 FTEs), as set out in Table 28.

The sectors forecast to experience the largest decline in absolute terms are Finance; the manufacture of Computer and Electronic Products; Food, Drink and Tobacco; and Transport Equipment, each experiencing a fall of 300 FTEs. However, these falls in employment should be placed in the context of the length of the plan period and the relative importance of these sectors in driving employment locally. For instance, considering the manufacture of Food, Drink and Tobacco, despite the fall in employment over the period 2023-2040, the sector will still retain its importance in generating significant employment across the borough.

Table 28 Forecast growth or decline by employment category 2023-2040.

Employment Sector	FTE change 2023-2040
Administrative & Supportive Services	2,600
Wholesale	1,000
Professional Services	700
Land Transport, Storage & Post	600
Accommodation & Food Services	300
Computing & Information Services	100
Real Estate	100
Recreation	100
Residential Care & Social Work	100
Agriculture, Forestry & Fishing	0

Employment Sector	FTE change 2023-2040
Air & Water Transport	0
Construction of Buildings	0
Education	0
Extraction & Mining	0
Fuel Refining	0
Health	0
Insurance & Pensions	0
Media Activities	0
Other Manufacturing	0
Pharmaceuticals (manufacture of)	0
Printing and Recorded Media (manufacture of)	0
Telecoms	0
Utilities	0
Machinery & Equipment (manufacture of)	-100
Non-Metallic Products (manufacture of)	-100
Wood & Paper (manufacture of)	-100
Chemicals (manufacture of)	-200
Civil Engineering	-200
Metal Products (manufacture of)	-200
Other Private Services	-200
Public Administration & Defence	-200
Retail	-200
Specialised Construction Activities	-200
Textiles & Clothing (manufacture of)	-200
Computer & Electronic Products (manufacture of)	-300
Finance	-300
Food, Drink & Tobacco (manufacture of)	-300
Transport Equipment (manufacture of)	-300
All sectors	+2,500

Source: Experian 2023

- 9.2.3 Employment in office and industrial use class sectors makes up approximately 44% of all employment in Wigan Borough in 2023 (39,630 out of a total of 89,800 FTE jobs).
- 9.2.4 Experian forecasts employment in office and industrial sectors overall to increase by 870 FTE jobs over the period 2023-2040, an increase of approximately 2.2%. The greatest increase in absolute terms is forecast to take place in office use class E(g)(i) jobs (+1,295 jobs), followed by warehousing and storage use class B8 jobs (+880 jobs). Employment in light industrial use class E(g)(iii) and general industrial (B2) sectors is forecast to fall.
- 9.2.5 CoStar data indicates that there are currently no premises in Wigan Borough that fall within the E(g)(ii) use class (the research and development of products or processes), and this is set to remain the case over the forecast period. However, this does not necessarily mean that there is no such activity within the borough, but that there is no accommodation specifically limited to that use (which may fall under E(g)(i)).

Table 29 Employment forecasts by use class, 2023-2040 – Labour Demand Scenario

Use class	Total jobs					Change 2023-2040
	2023	2028	2033	2038	2040	
E(g)(i)	21,360	21,745	22,290	22,520	22,655	1,295
E(g)(ii)	0	0	0	0	0	0
Total office jobs	21,360	21,745	22,290	22,520	22,655	1,295
E(g)(iii)	3,130	2,985	2,820	2,700	2,625	-505
B2	5,050	4,740	4,560	4,300	4,250	-800
B8	10,090	10,370	10,640	10,840	10,970	880
Total industrial jobs	18,270	18,095	18,020	17,840	17,845	-425
Total office and industrial jobs	39,630	39,840	40,310	40,360	40,500	870

9.2.6 Based on the above employment forecasts and the employment density assumptions summarised here, Wigan Borough is projected to register relatively minor changes in employment floorspace requirements across the borough over the period 2023-2040, with an additional 14,634 m² of office floorspace and 31,065 m² of industrial floorspace.

9.2.7 Floorspace requirement forecasts for the borough over the period 2023-2040 are presented in Table 30 below.

Table 30 Wigan Borough additional office floorspace need (m²) – Labour Demand Scenario

Use class	2028	2033	2038	2040	% change 2023-2040
E(g)(i)	4,351	10,509	13,108	14,634	6.1%
E(g)(ii)	0	0	0	0	-
Office floorspace need	4,351	10,509	13,108	14,634	6.1%
E(g)(iii)	-6,815	-14,570	-20,210	-23,735	-16.1%
B2	-11,160	-17,640	-27,000	-28,800	-15.8%
B8	26,600	52,250	71,250	83,600	8.7%
Industrial floorspace need	8,625	20,040	24,040	31,065	2.4%
Total Floorspace	12,976	30,549	37,148	45,699	3.0%

9.2.8 Finally, applying relevant plot ratios, floorspace requirements can be converted into land requirements (presented in hectares). As set out in Table 31, Scenario 1 suggests that Wigan will require an additional 6.9ha of employment land, before taking into account the replacement of losses, over the period 2023-2040.

Table 31 Wigan Borough Additional Employment Land (ha) – Labour Demand scenario

Use Class	Land (ha)
E(g)(i)	1.5
E(g)(ii)	0.0
E(g)(iii)	-5.9
B2	-7.2
B8	18.6
Total Employment Land	6.9

9.3 Scenario 2: Past Trends

- 9.3.1 The Past Trends scenario (Scenario 2) forecasts land requirements based on the continuation of historical net absorption of floorspace across the employment land use classes, sourced from CoStar, and extrapolates these trends over the assessment period.
- 9.3.2 The historical net absorption (annual average), by planning use class, is the measure of total floorspace occupied (indicated as a Move-In) less the total space vacated (indicated as a Move-Out) over a given period of time¹³⁰. This is projected forwards to inform the future demand for employment floorspace. As part of this exercise, several historical periods were considered – the past 5 years, past 10 years and past 14 years, as set out in Table 32. It was considered that the past 10-year average was the most robust, as it was not overly impacted by the 2008 financial crisis and was long enough to smooth the impact of Covid-19 (unlike the past 5-year average).
- 9.3.3 Wigan Borough registered robust net absorption of floorspace across office, general industrial and warehousing and storage uses over the past 10 years. This has coincided with a notable fall in vacancy rates, with office vacancy rates falling from 9.4% in Q1 2013 to stand at 2.7% currently, whereas industrial and warehousing vacancy rates have fallen from 5.0% to 2.5% over the same period.

Table 32 Average Annual Net Absorption of Floorspace (m²)

	5-Year	10-Year	14-Year
Office (E(g)(i))	3,068	3,198	2,493
R&D (E(g)(ii))	0	0	0
Light Industrial (E(g)(iii))	181	150	95
Industrial (B2)	206	5,274	4,075
Warehouse (B8)	15,548	13,208	16,171

- 9.3.4 The average historical annual absorption of employment floorspace was projected forward to 2040 from the 2023 baseline position.
- 9.3.5 Table 33 shows the evolution of floorspace requirements between 2023 and 2040. This shows that based on past trends, by 2040 there is a requirement for an additional 371,103 m² of employment floorspace in Wigan Borough.

¹³⁰ Lease renewals are not factored into net absorption. However, in a lease renewal that includes the leasing of additional space, that additional space is counted in net absorption. Pre-leasing of space in non-existing buildings (Planned, Under Construction or Under Renovation) is not counted in net absorption until actual move in, which by definition may not be any earlier than the delivery date.

Table 33 Additional Floorspace Requirements 2023-2040 – Past Trends Scenario

Use class	2028	2033	2038	2040	% change 2023-2040
E(g)(i)	15,988	31,977	47,965	54,361	22.5%
E(g)(ii)	0	0	0	0	
Office floorspace need	15,988	31,977	47,965	54,361	22.5%
E(g)(iii)	750	1,501	2,251	2,551	1.7%
B2	26,369	52,737	79,106	89,653	49.3%
B8	66,041	132,081	198,122	224,538	23.4%
Industrial floorspace need	93,160	186,319	279,479	316,742	24.6%
Total Floorspace	109,148	218,296	327,444	371,103	24.3%

9.3.6 Finally, applying relevant plot ratios, floorspace requirements can be converted into land requirements (presented in hectares).

9.3.7 As set out in Table 34, the evolution of land requirements in Wigan Borough to 2040 indicates a requirement for an additional 78.4ha (gross) of employment land.

Table 34 Additional Employment Land (ha) – Past Trends Scenario

Use Class	Land (ha)
E(g)(i)	5.4
E(g)(ii)	0.0
E(g)(iii)	0.6
B2	22.4
B8	49.9
Total Employment Land	78.4

9.4 Scenario 3: Policy-On

9.4.1 The Policy-On scenario (Scenario 3) considers the employment levels that could be possible, in line with Wigan Council's aspirations to create a more inclusive economy and a high quality place to live, work, invest and visit.

9.4.2 As set out in Section 7, this study has considered a range of potential influences on demand and development which are viewed as key factors determining levels of economic prosperity and growth in Wigan Borough. These have been informed through desk-based research and consultation with key stakeholders, with the influences grouped into three main factors: Infrastructure; Labour Availability and Skills; and Environment.

9.4.3 This scenario considers an outcome whereby the influence of these factors is optimised by supporting policy to maximise investment and/or the prevalence of good conditions for growth which are not

modelled in the Labour Demand scenario (Scenario 1). Each factor is allocated a weighted value based on an assessment of the degree to which adjustments/ improvements to these factors could influence the demand for employment floorspace in the borough. This is in the format of either higher (↑) demand than the baseline forecasts presented in Scenario 1, lower (↓) demand than the baseline forecasts or comparable demand to the baseline forecasts (→). Each of these indicators is given a weighting of 0.25%. The value of the adjustment was derived from professional judgement and experience from other studies, there being no guidance on which to base such an analysis. The adjustments realised under the Policy On scenario are set out in Table 35.

Table 35 Demand Adjusted Forecasts

	Office	Light Industrial	General Industrial	I&W
Baseline Forecast (per annum)	0.4%	-1.0%	-0.9%	0.6%
Infrastructure	↑	↑	↑↑	↑↑
Labour Availability & Skills	↑↑	↑↑	↑↑	↑
Environment	↑	↑	↑	↑
Uplift (per annum)	1.0%	1.0%	1.25%	1.25%
Adjusted Growth (per annum)	1.4%	0.0%	0.3%	1.8%

9.4.4 Applying the above adjustments generates the employment forecasts for office and industrial jobs set out in Table 36. This shows the projected evolution of employment in Wigan Borough between 2023 and 2040, with the fastest growth in employment expected to be in E(g)(i) use (office space) with an additional 5,853 jobs expected to be created between 2023 and 2040. This is followed by employment in B8 use (warehousing and storage), with an additional 3,646 jobs. There is forecast to be more muted growth in employment driven by E(g)(iii) (light industrial) and B2 (general industrial) uses, amounting to 15 jobs and 276 jobs respectively.

Table 36 Employment forecasts by use class, 2023-2040 – Policy-On Scenario

Use class	Total jobs					Change 2023-2040
	2023	2028	2033	2038	2040	
E(g)(i)	21,360	22,937	24,630	26,449	27,213	5,853
E(g)(ii)	0	0	0	0	0	-
Total office jobs	21,360	22,937	24,630	26,449	27,213	5,853
E(g)(iii)	3,130	3,134	3,139	3,143	3,145	15
B2	5,050	5,130	5,210	5,292	5,326	276
B8	10,090	11,048	12,098	13,246	13,736	3,646
Total industrial jobs	18,270	19,312	20,447	21,682	22,207	3,937
Total office and industrial jobs	39,630	42,249	45,077	48,131	49,420	9,790

Employment by use class is converted into floorspace requirements, applying the same methodology and assumptions as for the Labour Demand scenario (see Table 27 for employment densities applied). As set out in Table 37, this shows that, by 2040, there is a requirement for an additional 423,140 m² floorspace across office and industrial uses.

Table 37 Additional Floorspace Requirements 2023-2040 – Policy On Scenario

Use class	2028	2033	2038	2040	% change 2023-2040
E(g)(i)	17,819	36,954	57,502	66,139	27.4%
E(g)(ii)	0	0	0	0	
Office floorspace need	17,819	36,954	57,502	66,139	27.4%
E(g)(iii)	208	416	625	709	0.5%
B2	2,863	5,771	8,724	9,919	5.5%
B8	91,036	190,717	299,865	346,374	36.1%
Industrial floorspace need	94,106	196,904	309,214	357,001	27.7%
Total Floorspace	111,926	233,858	366,716	423,140	27.7%

- 9.4.5 Finally, applying relevant plot ratios, floorspace requirements can be converted into land requirements (presented in hectares). As set out in Table 38, the evolution of land requirements in Wigan Borough to 2040 indicates a requirement for an additional 86.2ha employment land, before taking into account the replacement of losses.

Table 38 Additional Employment Land (ha) – Policy On Scenario

Use Class	Land (ha)
E(g)(i)	6.6
E(g)(ii)	0.0
E(g)(iii)	0.2
B2	2.5
B8	77.0
Total Employment Land	86.2

9.5 Replacement of losses

- 9.5.1 The forecasting exercise also takes into account replacement of losses, i.e. the requirement to replace employment floorspace which has been converted or redeveloped into alternative uses.
- 9.5.2 It is likely that over the period between 2023 and 2040, the types of employment in Wigan Borough will change. This could relate to behavioural and lifestyle changes concerning the rise of hybrid / remote working models and the degree to which novel technologies and macroeconomic trends affect the performance of particular sectors. This concurs with the forecasts set out in Table 28, which indicate that there could be notable growth in the Administrative & Support Services (+2,600 FTEs), Wholesale (+1,000 FTEs) and Professional Services (+700 FTEs) sectors, yet a decline in employment in Finance; the manufacture of Computer and Electronic Products; Food, Drink and Tobacco; and Transport Equipment, each experiencing a fall of 300 FTEs over the plan period. It is possible that as employment requirements change, depending on suitability and viability, properties may be able to meet alternative demands via change of use.

- 9.5.3 Planning policy changes and the impact of Permitted Development Rights (PDR), which allow for changes of use with less stringent planning permission (subject to conditions and prior approval), also impact on the amount of employment floorspace lost to alternative uses. This could be exacerbated by the obsolescence of existing stock for continued commercial use, as set out in Section 6.4.
- 9.5.4 Annual monitoring from Wigan Council over the years 2011/12 to 2022/23 provide information on changes in floorspace by use type annually over this period. This is shown in Table 39 by floorspace type, including the average annual loss recorded across the time period.

Table 39 Employment Floorspace losses (m², 2011/12 – 2022/23)

	Office	R&D	Light Industrial	General Industrial	Storage & Distribution
Total Losses	6,594	-	585	63,285	18,474
Average Annual Loss	550	-	49	5,274	1,539

- 9.5.5 Not all losses need to be replaced as some will reflect restructuring in the local economy as set out above. Annual monitoring indicates that losses have been primarily driven by the loss of aged industrial (particularly B2) stock to residential and retail uses; however, the property market analysis highlights limited spare capacity available in the industrial market in Wigan Borough. Therefore, it has been assumed that 50% of industrial losses will be replaced each year, justified by the limited spare capacity and age of stock in line with precedent studies, equating to 3,431 m². This equates to 58,327 m² (14.2 ha) over the Local Plan period.
- 9.5.6 There has been a more limited loss of office floorspace over the period 2011/12 to 2022/23, with the one loss relating to aged stock. However, as with the industrial market analysis there is limited evidence of spare capacity in the market, and a similar 50% benchmark is deemed appropriate, resulting in an annual replacement allowance of 275 m². This equates to 4,671 m² (0.5 ha) over the Local Plan period.
- 9.5.7 The replacement of losses has been factored into Scenario 1 (Labour Demand) and Scenario 3 (Policy On), which both utilise employment forecasts provided by Experian, and therefore do not fully capture the individual characteristics and planning arrangements within local authorities. Scenario 2 (Past Trends) is underpinned by historic net absorption which considers the quantum of net floorspace occupied over a period of time (i.e. move-ins minus move-outs) based on lease deals, using data from CoStar. Net absorption therefore already takes into account the up-take of new space as it is delivered as well as vacation/loss of space and therefore how the market is restructuring over time. As such, including an allowance for the replacement of losses in relation to this scenario could result in double-counting and it is therefore excluded.

9.6 Sensitivity Testing

- 9.6.1 Sensitivity testing has been undertaken on the floorspace/land requirement forecasts in order to gauge how demand might change when certain variables are adjusted.

Employment Densities

- 9.6.2 To reflect the possible changes to employment space utilisation post-COVID, this sensitivity test adjusts the employment densities informing overall floorspace/land requirements. Namely, the employment density applied to office uses (E(g)(i)) were adjusted downward to account for the potential downsizing of offices since the pandemic due to increased remote working.
- 9.6.3 The employment density for E(g)(i) was revised from 11.3 m² per FTE to 8 m² per FTE, reflecting the low end of the respective scales as per the Employment Density Guide.
- 9.6.4 The results of the sensitivity tests within each of the three scenarios is reflected in Table 40.

Table 40 Employment Density Sensitivity Test Results

Change (ha) 2023-2040	Labour Demand Scenario	Past Take-Up Scenario	Policy On
Baseline Employment Densities	21.6 ha	78.4 ha	100.9 ha
E(g)(i) employment density reduced to 8 m ² per FTE	21.2 ha	78.4 ha	99.0 ha

Plot Ratios

- 9.6.5 The second sensitivity test undertaken was to adjust the plot ratios for each unit type. This sensitivity test reflects that, while we have adopted plot ratios in line with the evidence base and location-specific factors, actual realised plot ratios will differ on a site-by-site basis and the potential implications of variances are therefore useful to set out. The changes are reflected in Table 41.

Table 41 Plot Ratio Adjustments

Use Class	Baseline Plot Ratio	Lower Plot Ratio	Higher Plot Ratio
Office (E(g)(i))	100% of site area	80% of site area	120% of site area
Light Industrial (E(g)(iii))	40% of site area	30% of site area	50% of site area
Industrial (B2)	40% of site area	30% of site area	50% of site area
Warehouse (B8)	45% of site area	35% of site area	55% of site area

- 9.6.6 The results of the sensitivity test are presented in Table 42.

Table 42 Plot Ratios Sensitivity Test Results

Change (ha) 2023-2040	Labour Demand Scenario	Past Take-Up Scenario	Policy On
Baseline Assumptions	21.6 ha	78.4 ha	100.9 ha
Lower Plot Ratios	27.6 ha	101.7 ha	130.2 ha
Higher Plot Ratios	17.7 ha	63.8 ha	82.4 ha

9.7 Net Requirement for Floorspace and Land

Net requirement for office floorspace and land

- 9.7.1 The forecast net requirement for office space (E(g)(i) and E(g)(ii) uses) is set out in Table 43. The table identifies all the parameters which are used to inform the supply / demand balance. The existing supply position is informed by CoStar data on supply of office floorspace (in m²) and vacancy of floorspace (% of total stock available) as of Q2 2023.
- 9.7.2 The current supply of available floorspace is factored into the assessment after it is netted off against the optimum frictional vacancy rate (assumed to be 8% for office floorspace). This is because vacant, available employment floorspace could help to meet some of the identified needs.
- 9.7.3 Net requirements for office floorspace and land are identified for each scenario.

Table 43 Supply/demand balance for office floorspace 2023 to 2040

Parameters	Scenario 1 (Labour Demand)	Scenario 2 (Past Trends)	Scenario 3 (Policy On)
	Floorspace (m ²)		
A. Supply of occupied office floorspace	249,621	249,621	249,621

Parameters	Scenario 1 (Labour Demand)	Scenario 2 (Past Trends)	Scenario 3 (Policy On)
	Floorspace (m ²)		
B. Current vacant office floorspace	7,042	7,042	7,042
C. Total stock of office floorspace [A+B]	256,663	256,663	256,663
Forecast			
D. Gross Floorspace demand to 2040	19,304	54,361	70,810
E. Optimum frictional vacancy at 2040 [8% of A+D] ¹³¹	21,514	24,319	25,634
F. Surplus/deficit of vacant floorspace in 2040 [E-B]	14,472	17,277	18,592
G. Gross requirement for office floorspace 2023-2040 [C+D+F]	290,439	328,301	346,065
H. Net requirement for office floorspace 2023-2040 [G-C]	33,776	71,638	89,402
Land Requirement (ha)	3.4	7.2	8.9

9.7.4 This shows that up to 2040 there is a projected (net) requirement for between approximately 33,776 m² and 89,402 m² office floorspace in Wigan Borough. This would translate to a land requirement for office uses of between 3.4 ha and 8.9 ha.

Net Requirement for Industrial Floorspace and Land

9.7.5 The forecast net requirement for industrial floorspace and land is set out below in Table 44. The table identifies all the parameters which are used to inform the supply/demand balance. The existing supply position is informed by CoStar data. The current supply of available floorspace is factored into the assessment after it is netted off against the optimum frictional vacancy rate. This is because vacant, available employment floorspace could help to meet some of the identified needs.

9.7.6 Floorspace demand and net requirements for industrial space are identified for each scenario.

Table 44 Supply/demand balance for industrial floorspace 2023 to 2040

Parameters	Scenario 1 (Labour Demand)	Scenario 2 (Past Trends)	Scenario 3 (Policy On)
	Floorspace (m ²)		
A. Supply of occupied industrial floorspace	1,987,866	1,987,866	1,987,866
B. Current vacant industrial floorspace	49,773	49,773	49,773
C. Total stock of industrial floorspace [A+B]	2,037,639	2,037,639	2,037,639
Forecast			
D. Gross Floorspace demand to 2040	89,392	316,742	415,327
E. Optimum frictional vacancy at 2040 [8% of A+D]	166,181	184,369	192,255

¹³¹ An allowance for frictional floorspace has been included in our assessment. To operate efficiently a property market requires a small proportion of total floorspace to be readily available for take-up to allow businesses expanding or contracting to more to suitable premises. This available space is called frictional floorspace, the optimal rate of which we assume to be currently around 8%.

Parameters	Scenario 1 (Labour Demand)	Scenario 2 (Past Trends)	Scenario 3 (Policy On)
	Floorspace (m ²)		
F. Surplus/deficit of vacant floorspace in 2040 [E-B]	116,408	134,596	142,482
G. Gross requirement for industrial floorspace 2023-2040 [C+D+F]	2,243,439	2,488,977	2,595,448
H. Net requirement for industrial floorspace 2023-2040 [G-C]	205,800	451,338	557,809
Land Requirement (ha)	45.3	103.9	126.0

9.7.7 Up to 2040, the analysis predicts a net requirement for between 205,800 m² and 557,809 m² of industrial floorspace. This would translate to a land requirement for industrial uses of between 45.3 ha and 126.0 ha.

9.8 Conclusion – identification of Preferred Scenario

- 9.8.1 The scenarios set out within this section forecast varying changes in floorspace in Wigan Borough across the Local Plan period; with a more modest growth outlook forecast under Scenario 1 (Labour Demand); whereas Scenario 2 (Past Trends) and Scenario 3 (Policy On) project a stronger outlook for growth.
- 9.8.2 Scenario 1 (Labour Demand) forecasts relatively minor changes in employment floorspace requirements across the borough over the period 2023-2040, with an additional 19,304 m² (+8.0%) of office floorspace and 89,392 m² (+6.9%) of industrial floorspace, once the allowance for losses is taken into account. This scenario is underpinned by Experian employment forecasts which, though considering wider macroeconomic factors such as social and economic trends, do not fully capture the individual characteristics and planning arrangements within local authorities. The Places for Everyone Plan proposes a requirement for at least 16,527 new homes in Wigan Borough over the period 2022-39. This is 4,679 more homes than the baseline need suggested by the ONS household projections, with potential to increase the borough's working age population. Taken with Wigan Council's aspirations to create a high-quality place to live, work, invest and visit, this suggests the Experian forecasts could understate future growth and associated employment land requirements across the borough. As a result, Scenario 1 is discounted.
- 9.8.3 Scenario 2 (Past Trends) analyses the net absorption of floorspace by use class over the period 2013-2022 and extrapolates these trends over the assessment period, resulting in an additional 54,361 m² (+22.5%) office floorspace and 316,742 m² (+24.6%) industrial floorspace being forecast. Scenario 2 therefore presents a positive picture in relation to demand for floorspace; with the positive net absorption over the past decade which underpins the forecast highlighting that occupancy has increased in the borough, either through new firms entering the market or existing firms growing in size.
- 9.8.4 While presenting a positive growth outlook over the forecast period, Scenario 2 (Past Trends) can only provide an analysis of historic trends which draws into question its ability to project future change. Over the past decade, while net absorption has performed strongly, vacancy rates have fallen to currently stand at 2.7% for office, 1.3% for light industrial and 2.5% for industrial and logistics uses, well below the accepted frictional vacancy rate of ~8% viewed to represent a healthy, functioning commercial market. As such, this suggests a supply constrained market has developed in Wigan, and the use of historic net absorption could act to understate demand in the borough over the Plan Period. Furthermore, Wigan Council has aspirations to improve the performance of the local economy, by attracting optimal occupiers, supporting higher value activities and moving up the value chain in the industrial market. The land requirements associated with Scenario 2 risk a continuation of the prevailing focus on the re-use of existing employment areas for lower value/density activities, whereas

the provision of additional land where modern specification floorspace can be more readily accommodated, in line with the requirements of potential higher value occupiers, stands to align with local growth aspirations.

- 9.8.5 Scenario 3 (Policy On) adjusts the Experian forecasts in order to understand the level of growth that could be possible (and associated office and industrial floorspace requirements) should Wigan Council policies and investments realise growth in the Borough above and beyond the projections outlined in Scenario 1. Scenario 3 is considered a forward-looking scenario to demonstrate the potential for growth should improvements to Infrastructure; Labour Availability and Skills; and Environment across the borough come forward within the Local Plan period, in line with the Council's growth aspirations. It interprets the influences on demand and, based on professional judgement and previous experience of similar context alone, allocates a weighted value based on an assessment of the degree to which adjustments/ improvements to these factors could influence the demand for employment floorspace in the Borough. This results in a forecast requirement for 70,810 m² (29.3%) office floorspace and 415,328 m² (32.3%) industrial floorspace.
- 9.8.6 Scenario 3 (Policy On) presents an ambitious growth outlook in line with aspirations held by the Council to create a more inclusive economy, that creates a high-quality place to live, work, invest and visit, and wider growth drivers set out in the Places for Everyone Plan. This is not only reflected in the quantum of employment land forecast over the plan period, which, while not radically different, is higher than Scenario 2 (Past Trends), but also in the breakdown of land requirements which place a greater emphasis on office uses in line with local growth aspirations to support higher value service activities and attract optimal occupiers in the industrial market. Indeed, anecdotal evidence suggests that recent development in Wigan Borough has tended to focus on the re-use of employment space for lower value/density in terms of supporting employment, with feedback from the commercial property market highlighting the need for fit-for-purpose sites to support higher value occupiers. This is likely to be best met by the provision of additional land where modern specification floorspace can be provided more readily than through redevelopment of existing in-use employment sites where land assembly may be required and existing occupiers may need decanting, reinforcing the relative attractiveness of Scenario 3.
- 9.8.7 As such, Scenario 3 (Policy On) is considered the preferred scenario for future floorspace needs and employment land requirements for all employment land uses in Wigan Borough over the new Local Plan period to 2040.

10. Comparison between supply and demand

10.1 Introduction

- 10.1.1 This section compares the projected future demand for office and industrial floorspace and land between 2023 and 2040, as earlier described in Section 9, with the existing supply conditions in the borough, as earlier described in Section 6 and Section 8. It factors in the pipelines for development of office and industrial floorspace and land within the borough to inform an overall position of how supply may change over the planning period, and how that influences the overall supply and demand balance.
- 10.1.2 Broadly, supply in excess of demand suggests a demand constrained position; and where demand is in excess of supply, a supply constrained position with the requirement to identify additional floorspace/land for employment use activities and ensure growth is adequately supported.

10.2 Supply - Pipeline

- 10.2.1 As set out in the assessment of existing employment areas in Section 8, a number of existing employment sites across Wigan Borough represent a potential pipeline for future development. In addition, Wigan Council's records of consented planning permissions for employment use that have not yet been built out indicate additional potential pipeline supply. This section sets out the supply of available land within the employment areas and sites allocated in the Places for Everyone, and that within approved planning applications, before providing a perspective on how this combined pipeline supply could meet needs, prior to a consideration of the quality of existing built-out sites within Section 10.3.

Employment land supply sites without planning permission

- 10.2.2 The employment land supply sites without planning permission within designated employment areas in the adopted Development Plan, as well as other sites which are allocated in the Places for Everyone Plan, are listed in Table 45.

Table 45 Employment land supply sites without planning permission

Ref	Employment Area or Allocation Name	Policy	Total area (ha)	Site(s) area (ha)
12	Gibfield	EM1A	24.2	0.81
15	Swan Lane	EM1A	26.71	0.83
16	Makerfield Way	EM1A	27.84	0.78
20	Westwood Park	EM1A	17.21	4.8
25	Martland Park and Heinz	EM1A	92.92	3.73
32	Warrington Road, Hawkley	EM1A	13.55	0.59
36	South Lancashire Industrial Estate	EM1A	90.63	19.5
JPA31	Land at M6 Junction 25	JPA31	54.41	6.2
JPA33	Pocket Nook	JPA33	3.75	3.75
JPA34	West of Gibfield	JPA34	11.4	11.4
Total				52.4

- 10.2.3 The use class of space which could come forward from the development of vacant land is not known at this stage, though based on the balance of employment land supply by use class in the borough, it is expected that most opportunities would be for industrial employment floorspace.
- 10.2.4 However, as set out in Section 8, few of these sites demonstrate strong alignment with the needs of Wigan's core and cross-cutting sectors, and a significant number of these vacant sites have been vacant for a number of years (excluding the allocations in the Places for Everyone Plan), many of which also have identified barriers to development ranging from land ownership to remediation and viability constraints. These factors are likely to have been a factor in the lack of employment land take-up in the borough recorded over a number of years and may have contributed to low levels of vacancy – below frictional rates – recorded across the borough, as set out in Section 6.
- 10.2.5 The available employment land in Wigan Borough therefore currently lacks the quality profile to align with occupants' likely requirements, and/or is subject to constraints that could limit its potential for development, which could limit Wigan Council's aspirations to attract higher value activities and achieve the economic potential of the borough.

Planning Pipeline – Employment Sites with planning permission

- 10.2.6 If all approved planning applications were to come forward for development, 238,914 m² of floorspace would be delivered when both gains and losses are considered.
- 10.2.7 The vast majority of this floorspace is supported through approved planning applications at Land at M6 Junction 25 (113,965 m²), South Lancashire Industrial Estate (58,064 m²), Chaddock Lane, Astley (32,826 m²) and Plots 2 & 3 Warrington Road, Hawkley (10,492 m²). This translates to 93.1 hectares of employment land, as set out in Table 46.

Table 46 Planning Pipeline

Total Planning Pipeline (m²) Planning Pipeline Land (ha)

238,914	93.1
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- 10.2.8 If implemented, these permissions may serve to reduce overall land requirements. However, there is a possibility that some developments may not come forward, or be developed in whole or in part for different uses than has currently been consented. This cannot directly be deducted from the stated net requirements at this stage.

Pipeline Supply Compared to Demand

- 10.2.9 The outcome of the comparison between employment land demand and available supply, based on the current portfolio of sites / allocations across the borough, is set out in Table 47. This indicates that, taking into account pipeline sites, there is sufficient supply available to meet projected demand in Wigan Borough over the Plan period. However, as noted above, the borough's available employment land supply lacks the quality profile to align with occupants' likely requirements, and/or is subject to constraints that could limit the likelihood of it coming forward for development, while some developments in the planning pipeline may not come forward, or be developed in different quantities by use class than has been consented.

Table 47 Summary of Demand vs Available Undeveloped Land

Scenario 3 (Policy On)

<i>Demand</i>	
A) Net Office Land	8.9
B) Net Industrial Land	126.0
C) Total Demand [A+B]	134.9
<i>Supply (Available Undeveloped Land)</i>	

D) Existing Local Plan/PfE allocated sites	52.4
E) Pipeline (ha)	93.1
<i>F) Total Supply (Available Undeveloped Land) [D+E]</i>	145.5
G) Total Supply – Total Demand [F-C]	10.6

10.3 Supply - Existing Employment Areas

- 10.3.1 Having considered the balance between employment land demand and available pipeline supply to meet need over the Local Plan period it is necessary to consider the suitability of Wigan Borough's existing employment areas for continued employment use so this can be factored into an overall conclusion on the supply and demand balance in the borough.
- 10.3.2 As set out in Section 7, consultation with property market professionals indicates that industrial and logistics companies across the borough's core and cross cutting sectors are increasingly demanding high quality floorspace. This extends to the office market, with companies recognising the role of the office as a recruitment and productivity tool, with a significant shift towards designing space around the employee in order to gain and retain the best staff. A key driver of this change is functionality, companies' ESG commitments and wider drivers in relation to minimum energy efficiency standards. As shown in Section 6, the proportion of the building stock in the borough which falls within the scope of tightening regulations to 2030 is higher than the national average.
- 10.3.3 In addition to the quality of floorspace, the quality of the environment and surroundings are also prominent in businesses requirements. While these characteristics are already established requirements for office occupiers, industrial and logistics investors are increasingly looking to accommodate future growth in more of a business park environment too incorporating a high quality internal environment (such as formal planting, suitable lighting, parking capacity and legible through-site navigation) and access to amenities on or near to sites. In relation to the surroundings, key considerations include the proximity to sensitive receptors and physical site constraints, which can limit or reduce the efficiency of firms' operations.
- 10.3.4 The location of sites is a key determinant of inward investment, with transport connectivity highlighted through the consultation exercise. Access to the strategic road network is a key driver, particularly for industrial and logistics businesses, while proximity to public transport is also an important consideration for businesses to be able to access a wide and diverse pool of labour, both from local communities and as a means to access requisite skills, given the borough's relative underperformance in relation to higher level skills. This is particularly the case for office employment, which benefits from greater workforce mobility.
- 10.3.5 As set out in Section 8, the assessment of Wigan Borough's existing employment areas' alignment with these factors, adopted as potential drivers of current and future market demand for floorspace, highlights that while a number of existing employment areas are well-performing, there are several employment areas that score poorly across a number of the key criteria, particularly in relation to more peripheral or constrained industrial and logistics sites in the borough, which lack accessibility and have a poor quality profile in terms of building age/condition and quality/suitability of the overall environment. While accommodating the needs of existing occupiers and churn/expansion within the market, these sites would be unlikely to attract larger or higher value occupiers across Wigan Borough's core and cross-cutting sectors.
- 10.3.6 Similarly, in relation to vacant sites, the analysis highlights that, despite some higher quality sites that demonstrate relatively strong marketability, which are better placed to support current and future market requirements for the borough's core and growth sectors, few of the vacant sites score strongly across multiple domains and many are subject to constraints that could limit their potential for development.
- 10.3.7 The assessment therefore identifies that a portion of Wigan Borough's existing employment areas and vacant sites have a quality profile somewhat below potential occupants' likely requirements, highlighting a mismatch between the supply of employment land in Wigan Borough and the requirements of its core and cross-cutting sectors. This has the potential to constrain the ability to

secure and attract businesses to the local area to help achieve the Council's aspirations to create a more inclusive economy that creates a high-quality place to live, work, invest and visit, and fulfil the borough's economic potential.

10.4 Overall Comparison of Supply and Demand

- 10.4.1 The above assessment has concluded that on the basis of consideration of the pipeline supply of employment land alone, there could be sufficient supply to meet needs over the Local Plan period. This however is tempered by the uncertainty regarding the delivery of all this supply, particularly of any vacant sites within existing employment areas and allocations in the Places for Everyone Plan where there is no extant planning permission for employment use development, such that a surplus may readily become a deficit. More certainly, the suitability of existing employment areas to continue to meet demand over the Local Plan period is constrained by a portion of these not matching occupier requirements, both now and in the future; especially requirements of those core and cross-cutting sectors highlighted as being key to creating a growing and more inclusive economy as aspired to by the Council and supported by the analysis in Section 7.
- 10.4.2 Overall, it is therefore considered that once pipeline and existing quality of supply are factored in, the supply of suitable land to meet economic development purposes in Wigan Borough will not be sufficient to meet needs forecast to arise over the Local Plan period. There is a requirement therefore to allocate new land which would deliver sites and premises which can better align with the requirements of the borough's core and cross-cutting sectors in terms of location, quality profile and environment.
- 10.4.3 Core locations for the industrial and warehousing/logistics sectors are likely to be sites with suitable capacity in proximity to core routes such as the M6, M58, M61 and A580. In relation to office space, the core locations of Wigan and Leigh town centres are expected to continue to be the focus of opportunities for additional space given that they are established locations, and their connectivity and access to amenities would be the most attractive locations to prospective occupiers. However, consultation with agents undertaken in support of this study has also highlighted that small, well-connected campus-style office parks have been successful in competing locations such as Haydock in recent years and could come forward in the borough outside these town centres. Furthermore, given the increased uptake in hybrid-working arrangements that drive demand for the use of space close to home, the provision of space to meet the needs of professional and technical sectors within new mixed-use developments should be considered, to attract higher value jobs to the area and build on linkages in the east of the borough to Greater Manchester, as demonstrated in Section 4.

11. Conclusions and Recommendations

11.1 Introduction

- 11.1.1 This section concludes our assessment by drawing on the findings from preceding chapters and providing options for policy direction regarding employment land in Wigan.
- 11.1.2 The analysis above forecasts increased demand for office and industrial floorspace within the borough over the Local Plan period to 2040, with this distinctly weighted towards industrial floorspace. Considering the quantum of land available at allocated sites and employment sites in the planning pipeline, this does result in a position whereby supply marginally exceeds the demand for employment land in the borough. However, the analysis of existing employment areas presented in Section 8 and the aspirations of the Council to improve the performance of the local economy, by attracting optimal occupiers, supporting higher value activities and moving up the value chain in the industrial market, suggests the supply of land that is suitable for economic development purposes in Wigan Borough will not meet demand, necessitating the allocation of additional sites, or replacement of sites, to improve economic performance up to 2040.
- 11.1.3 The safeguarding of existing higher quality sites, to ensure there is a ready supply of premises and that vacant land and intensification opportunities can potentially be realised, is considered important in Wigan Borough. However, while it is important to protect employment land, there is also strong evidence of competition for space from non-employment uses such as housing. Employment land policies will therefore need to accommodate the Council's ambitions and objectives in these areas.
- 11.1.4 In practice, a flexible approach to the protection of employment land, that considers the merits of each individual site, is recommended to ensure that sites that are unlikely to remain suitable for ongoing employment use during the Local Plan period can be considered for alternative use, whilst those sites most appropriate to meeting needs continue to be protected. This approach would ensure that the over protection of sites, which could result in the inefficient use of assets and blight and deter investment, does not occur. Similarly, it is important to ensure that the under protection of sites, whereby the market intervenes prematurely to short-term demand indicators and adversely impacts the long-term provision of employment land, also does not occur.
- 11.1.5 When forming employment land policies, the Council should follow a balanced approach such that the employment activities of all business sizes, from start-ups to large headquarters, are supported and encouraged. The Council should also recognise that demand will vary by type of space and will therefore be geographically varied.

11.2 Conclusions

Office space (E(g)(i), E(g)(ii) and Sui Generis Office Use Classes)

- 11.2.1 The latest published CoStar data shows there is approximately 257,000 m² of office floorspace across 337 properties in Wigan Borough, accounting for approximately 21% of office floorspace across the FEMA and a very low circa. 4% of total office floorspace across Greater Manchester.
- 11.2.2 Premises are mostly small in size, and clusters of office space can be found in Wigan and Leigh town centres. Almost half of buildings were constructed before 1960, with very few being constructed since 2010.
- 11.2.3 Analysis shows that demand for office premises in Wigan is generally positive with a vacancy rate of 2.7%, considerably lower than averages in the FEMA, Greater Manchester, and England and reflecting potential supply constraints within the local market. Net absorption has also been positive over the last decade, however, there has been a slackening of demand over the past 5 years.
- 11.2.4 Despite positive trends in vacancy rates and net absorption, rental values have remained considerably lower than in the FEMA, Greater Manchester and nationally, over the past decade. In regard to viability, market yields for office space in Wigan Borough are higher than comparator areas, indicating a higher risk profile, which can deter investment. The borough is an affordable place to rent office floorspace from a financial viewpoint and is maintaining its level of affordability.

- 11.2.5 The projected demand for office floorspace up to 2040 is for an estimated net additional 89,402 m² of floorspace under the preferred scenario. This requirement is due to expected growth in sectors that require office space, which is likely to be driven by a range of social, demographic and wider economic factors.

Industrial space (E(g)(iii), B2, B8 and Sui Generis Industrial Use Classes)

- 11.2.6 The latest published CoStar data shows there is approximately 90,000 m² of light industrial floorspace and 1,950,000 m² of general industrial and warehousing floorspace in the borough. Industrial activity is clustered in Wigan, Leigh, Hindley, and Golborne, and there are various industrial estates in other towns.
- 11.2.7 The light industrial market occupies 25% of space across the FEMA, being characterised by mostly small premises, and contains a notable proportion of buildings which were constructed during the 1980s. Vacancy rates for light industrial space are in line with the comparator geographies, however market rent is well below the national average. Rents in Wigan Borough have risen steadily over the last decade whilst they have increased much faster nationally. This suggests that affordability could be increasing relatively in the borough. In addition, market yield has decreased in the borough over time, suggesting that attractiveness for investment has improved.
- 11.2.8 General industrial and storage and distribution occupies a larger proportion of space in the FEMA at 37% and is characterised by stock that was generally constructed in the 1980s onwards. Vacancy rates are similar to the comparator geographies. Rental values are also in line with the other geographies, and this has consistently been the case over the past decade. However, there has been an increase in rental values for warehousing space in recent years according to local agents, likely due to an increase in e-commerce.
- 11.2.9 The projected demand for industrial floorspace up to 2040 is for an estimated net additional 557,809 m² of floorspace under the preferred scenario. Core drivers for B2/B8 occupiers include access to the primary road network, quality of space and the availability of expansion space and, increasingly, suitable public realm / the quality of the environment befitting a modern business environment. A significant number of unimplemented permissions for B2/B8 floorspace in the pipeline align with these requirements, including at M6 Junction 25, South Lancashire Industrial Estate and Chaddock Lane in Astley, and should be encouraged.

11.3 Recommendations

- 11.3.1 Based on the analysis and conclusions presented in previous sections, recommendations in relation to employment land with supporting justifications are set out below.

R1: To meet the future requirements for office and industrial floorspace in Wigan Borough, the Council will need to make choices about which existing employment areas and sites to protect, and to identify new sites for employment development to support growth and facilitate transformational change, in order to deliver against the aspirations of the Council to drive inclusive growth in higher value activities.

Justification

- 11.3.2 The projected demand assessment estimates that there is net additional demand for 134.9 ha of employment land (E(g)(i), E(g)(ii), E(g)(iii), B2 and B8) across Wigan Borough over the Local Plan Period to 2040.
- 11.3.3 Considering land available for development within existing allocated sites/areas which are allocated in the Places for Everyone Plan and existing approved permissions within the planning pipeline, the total supply of available undeveloped land is marginally higher than forecasted demand, as set out in Table 47.
- 11.3.4 This demand / supply analysis assumes that the Council's undeveloped employment sites come forward in their entirety for employment development over the plan period, and that all extant planning permissions for employment uses will be developed. Any significant deviation from this position would have an impact upon the overall balance, resulting in an undersupply of available land.

- 11.3.5 National Planning Practice Guidance states that Councils should identify a future supply of land which is suitable, available and achievable for economic development uses over the Local Plan period. There is a risk to the Council in having a portfolio of employment sites that has a quality profile somewhat below potential occupants' likely requirements, as reflected in Section 8 of this report. This is particularly the case in relation to the industrial and warehousing sector, with feedback highlighting the need for strategically located sites in proximity to the strategic road network.
- 11.3.6 A key consideration within this context relates to the size of employment sites. For larger industrial and logistics uses, the size, shape, and topology of a site will likely have a strong influence on its investment credentials. As reflected in Section 7, manufacturing and logistics occupiers are increasingly demanding well-proportioned sites that offer the potential to meet current operations and future growth requirements, as well as providing a quality external environment in a modern business park setting, reflecting appropriate plot densities as adopted within this study. Similarly, construction companies often require adequate yard space to ensure their effective operation. The analysis set out in Section 6 highlighted a relative lack of industrial units in the 2,000-5,000 m² bracket compared to comparator areas, though in relation to the logistics sector consultation highlighted a lack of 500,000-600,000 ft² (46,450-55,740 m²) units available in the North West market.
- 11.3.7 At the other end of the scale, Wigan Borough's construction and manufacturing sectors are home to 1,645 and 440 microbusinesses, respectively¹³². These companies are likely to require smaller floorplates, with consultation highlighting a limited supply of sufficient quality workshops and small lockups available within the borough. Furthermore, the potential for new demand arising to meet requirements for retrofitting supply chains, identified in Section 7, could also provide demand for small and medium-sized industrial sites that will be well-placed to accommodate such businesses where premises are available.
- 11.3.8 For E(g)(i) uses, occupiers are demanding modern, flexible floorspace within standalone buildings, to allow suitable delineation. Given downsizing considerations associated with the Covid-19 pandemic, smaller floorplates of less than 3,000 ft² (280 m²) were noted to represent where demand is currently strongest in Wigan Borough, with medium to large properties subject to more limited demand.
- 11.3.9 It is recommended that existing fit-for-purpose sites are protected for employment use, based on suitable criteria, and that the Council considers the need for additional good quality, well-located employment sites that have the potential to capitalise on economic growth opportunities, particularly within the borough's core and cross-cutting sectors, and deliver against aspirations to drive growth in high value activities.
- 11.3.10 The higher performing employment areas identified in this study represent those most suited to protection against development for alternative use. These are:
- Stone Cross Park (1)
 - Golborne Enterprise Park (2)
 - Newton Road (4)
 - Moss Industrial Estate (5)
 - Hope Carr/Leigh Commerce Park (8)
 - Gibfield (12)
 - Seaman Way (17)
 - Westwood Park (20)
 - Wigan Pier Business Park (21)
 - Martland Park and Heinz (25)
 - Lamberhead Industrial Estate (29)
 - Smithy Court and Beecham Court (30)
 - Warrington Road, Hawkley (32)

¹³² ONS UK Business Counts - enterprises by industry and employment size band 2023

- Wheatlea Industrial Estate (33)
- Land Gate (34)
- South Lancashire Industrial Estate (36)

R2: Local Plan policy should provide criteria for determining if alternative uses should be permitted, to be applied across employment areas. Alternative uses will typically be most appropriate at less well performing areas.

Justification

- 11.3.11 As noted above, the analysis of existing employment areas in Section 8 highlighted the risk to the Council in having a portfolio of employment sites that has a quality profile somewhat below potential occupants' likely requirements, particularly in relation to the industrial and warehousing sector.
- 11.3.12 Given this, Local Plan policy should set out clear criteria for determining whether existing employment areas should be retained or could be considered for alternative use whereupon this would maximise the contribution to local economic development. Key criteria could include, but are not limited to:
- Building age;
 - Building condition;
 - The quality of public realm, environment and surroundings;
 - Access for commercial traffic to the primary road network / motorway;
 - Access to public transport; and
 - Type and mix of existing businesses and alignment with Wigan's core and cross-cutting sectors.
- 11.3.13 It will also be important to consider wider factors such as occupancy rates, land ownership structure / complexity, market interest and the adequate separation from sensitive receptors for industrial uses. These criteria should be objective and applicable to all existing employment areas. It is appropriate for the Council to safeguard well performing sites, such as, but not limited to, those highlighted above where possible, to avoid jeopardising the long-term prosperity of the local economy and safeguard the needs of existing and new businesses.
- 11.3.14 The findings of the assessment of the existing employment areas alignment with, or suitability of meeting, current and future market demand set out in Table 20, Table 22 and Table 24 of Section 8 can be used to support the implementation of this.

R3: Local Plan policy should provide the conditions to support inclusive growth in line with the Council's aspirations, considering the range of potential influences on demand and development.

Justification

- 11.3.15 The preferred scenario taken forward within this report (Scenario 3: Policy On) considers the employment levels that could be possible, in line with Wigan Council's aspirations to create a more inclusive economy and a high quality place to live, work, invest and visit. This scenario reflects an outcome whereby the influence of a range of potential influences on demand and development – Infrastructure; Labour Availability and Skills; and Environment – is optimised by supporting policy to maximise investment and/or the prevalence of good conditions for growth which are not modelled in the Labour Demand scenario (Scenario 1).
- 11.3.16 The ability to maximise investment and/or the prevalence of good conditions for growth in line with these aspirations will not happen in isolation and will require a concerted and coordinated approach across the Council and partners. The Council should therefore consider its potential policy levers and the actions it can take to address the challenges and capture the opportunities outlined in Section 7.4 which have the potential to unlock investment and contribute to the borough's growth aspirations.

R4: The Council should seek to support occupiers and landlords in addressing the retrofitting challenge. To do so, the Council could draw upon local connections with occupiers and landlords and coordinate action to prevent the accumulation of 'stranded assets' across the borough.

Justification

- 11.3.17 A key responsibility for the Council over the Local Plan period will be to remain cognisant of national government policy direction regarding the drive towards net zero and retrofitting requirements. This issue is even more pertinent given the analysis set out in Section 6.4, which highlights that the proportion of the building stock in the borough which falls within the scope of tightening regulations to 2030 is greater than the national average.
- 11.3.18 Over the coming years employment space in the borough will be required to meet energy efficiency standards above those met by the existing stock. This could impact the supply of lettable floorspace within the borough.
- 11.3.19 While there has so far been limited government steer into how commercial premises should tackle the retrofitting issue, with findings from the 2021 consultation remaining unpublished, there is a firm ambition for Greater Manchester to be carbon neutral by 2038, which highlights a considerable requirement for solutions targeted at the non-domestic sector due to the huge variation in use types and building age and construction¹³³.
- 11.3.20 There are steps that the Council can take to support occupiers and landlords throughout this process. The Council could seek to drive forward the retrofitting agenda locally by acting on its stock – which may contribute to market confidence – and utilising local connections with occupiers and landlords, all while keeping abreast of national and Greater Manchester policy on the topic. It is anticipated that the government will release some form of guidance into a retrofitting approach given the national reach of this issue and the Council should seek to promptly apply this at the local level. Furthermore, Wigan Council will need to work closely in partnership with GMCA and engage with other Greater Manchester boroughs to identify and develop an appropriate delivery model, utilising data available on the local energy market, to suit the scale and complexity of the commercial property stock in the borough needed to contribute to Wigan's decarbonisation in line with its Local Area Energy Plan.

R5: The Council should consider developing an affordable workspace policy which reflects the needs of start-up businesses and the foundational economy.

Justification

- 11.3.21 The extent to which workspace is deemed 'affordable' varies considerably based on the type of business which the workspace is provided to accommodate. The EMELA has identified that the vast majority of businesses (8,320) were classed as micro (defined as companies employing up to nine employees), making up 88.8% of enterprises, while a net increase in enterprises in Wigan Borough has been recorded over the past 5 years. Though also representing the borough's core and cross cutting sectors, many of these enterprises are concentrated in the foundational economy, such as construction trades, logistics and small-scale consultancies and business services firms operating in the local/sub-regional market.
- 11.3.22 These enterprises require floorspace that is fit for purpose, with adequate spatial typologies and facilities, however the consultation highlighted that such firms can be marginalised and required to operate from lower quality employment areas which are more cost effective. As such, current conditions are limiting the potential growth of economically generative local businesses that can support inclusive economic growth and tackle inequalities, in line with the Council's Community Wealth Building ambitions and Policy JP-J1 of the Places for Everyone Plan.

¹³³ Greater Manchester Local Area Energy Planning June 2022

- 11.3.23 With regards to the development of an affordable workspace policy and/or strategy, the Council should refrain from being too formulaic in its approach, such that it is flexible to the nuances of different types of spaces required and is not overly prescriptive in terms of the location of affordable workspace.
- 11.3.24 Overall, it is recommended that the Council explores further the potential requirements and content of policy to guide the delivery of affordable space in the borough. Key considerations within this could include:
- List of activities and occupiers suitable for public support.
 - Sites and locations where policy might apply.
 - Appropriate typologies of workspace.
 - Minimum requirements to ensure that space is operationally and commercially viable to understand whether affordable workspace could be delivered within a new development by a developer (i.e. S106 conditioning the planning application approval to the delivery of an affordable space unit on-site) or off-site delivery wholly or partially financed by a developer through pooled financial contributions, potentially supported by regeneration or economic development funding if available.
 - Formulas for provision of any off-site financial contributions.
 - Rental levels.

R6: The Council should continue to monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the plan period to 2040. This includes ensuring that permitted development rights and the introduction of Class E do not impact the integrity of employment areas through facilitating the introduction of non-employment uses.

Justification


- 11.3.25 It is important that appropriate and sufficient monitoring mechanisms are embedded within the plan-making process to record the change in employment land available for economic growth. The aim of monitoring employment land is to ensure that overall, an approximate quantum of appropriate employment land supply is retained in the borough to meet the level of projected demand. The monitoring system will help track planning permissions and completions in order to maintain a clear understanding of the market conditions operating in the local area – of particular importance given ongoing uncertainty regarding the demand for office floorspace – and, in particular, changes of use.
- 11.3.26 This is to guard against too much employment land being released to higher value uses such as residential through the permitted development rights provision, as this could restrict the economic potential of the borough, or being retained without a clear demand justification. To ensure that employment land is not protected unnecessarily as required by the NPPF, the demand forecasting exercise should be updated regularly. This could be performed every three to five years. However, in the periods in between employment land reviews the Council should continue to regularly review how much employment land has been lost. The Authority Monitoring Report is likely to be the most appropriate framework for this monitoring and review exercise.
- 11.3.27 The introduction of Class E use type premises means that controlling employment uses within it from switching to other Class E uses such as retail, leisure and community use will mostly not be readily possible. Furthermore, it will become more difficult for the Council to monitor these changes over time through conventional planning monitoring data, as planning permission is not needed to change the use of these from an employment use to another use.
- 11.3.28 Over time, this flexibility could potentially alter the composition of existing employment areas and reduce the supply of existing employment space, particularly in those locations within the borough that face pressure from other Class E uses. This flexibility may alter the composition of existing employment areas and reduce the supply of existing employment space, particularly in those locations within the borough that face pressure from other Class E uses, albeit these areas are not considered to be common based on the survey of supply. Nevertheless, there is an opportunity for the Local Plan

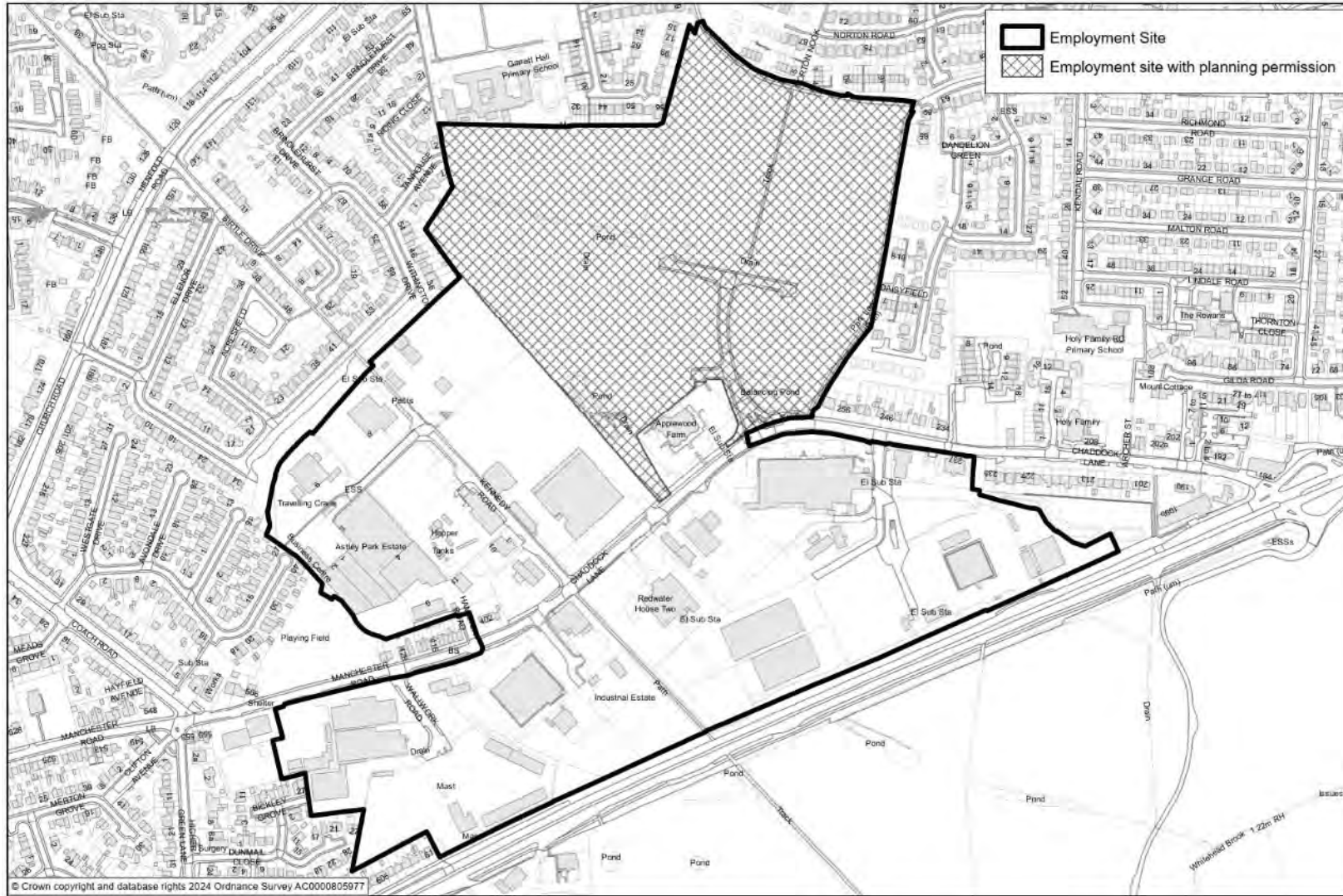
to clearly reference the protection of office – E(g)(i)/(ii), light industrial – E(g)(iii), industrial – B2 and warehousing – B8 uses by specifying these as appropriate within the emerging policies.

- 11.3.29 The greater flexibility associated with the Class E use type presents the potential for on-site facilities such as convenience retail, gyms and other supporting uses as part of industrial estates / office developments to be more readily accommodated. The Council should consider how the changes might be used to positively contribute to the future supply of office and light industrial space, such as through vacant retail space being repurposed as light industrial space within Class E provided these are surplus to needs.

Appendix A Maps of employment land supply sites

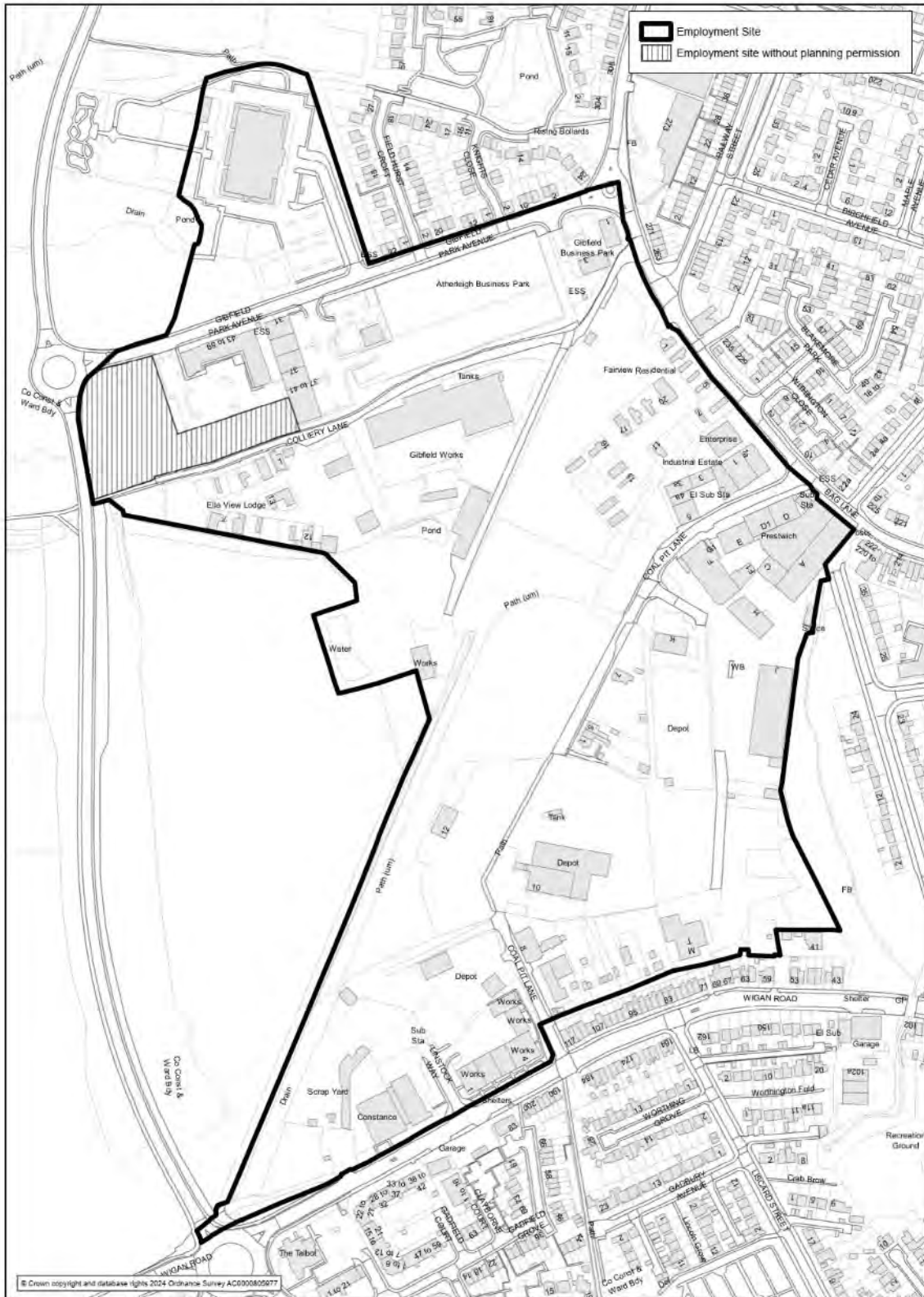
Employment Area: EM1A.9 Chaddock Lane, Astley

1:4,750 



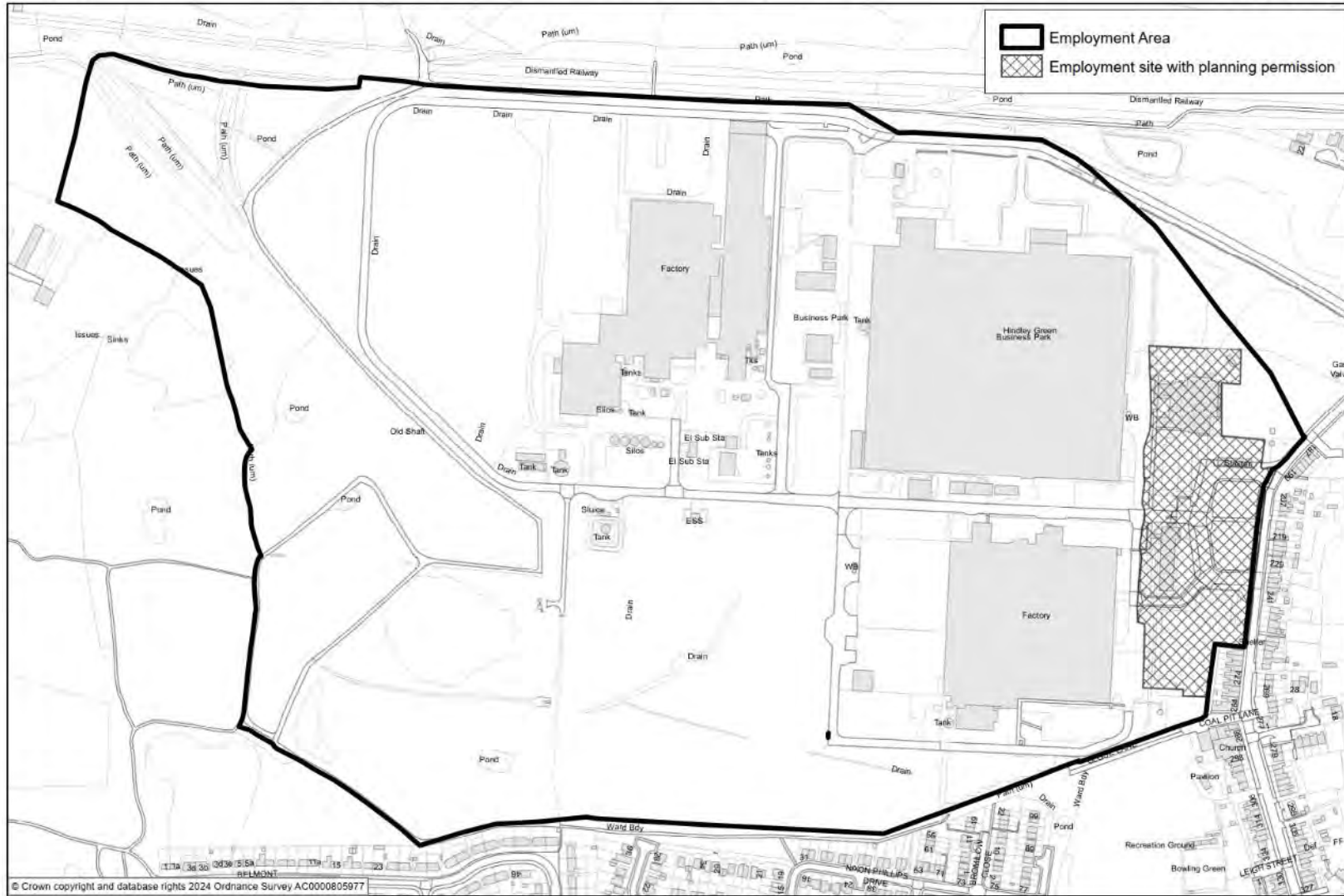
Employment Area: EM1A.12 Gibfield

1:3,461 




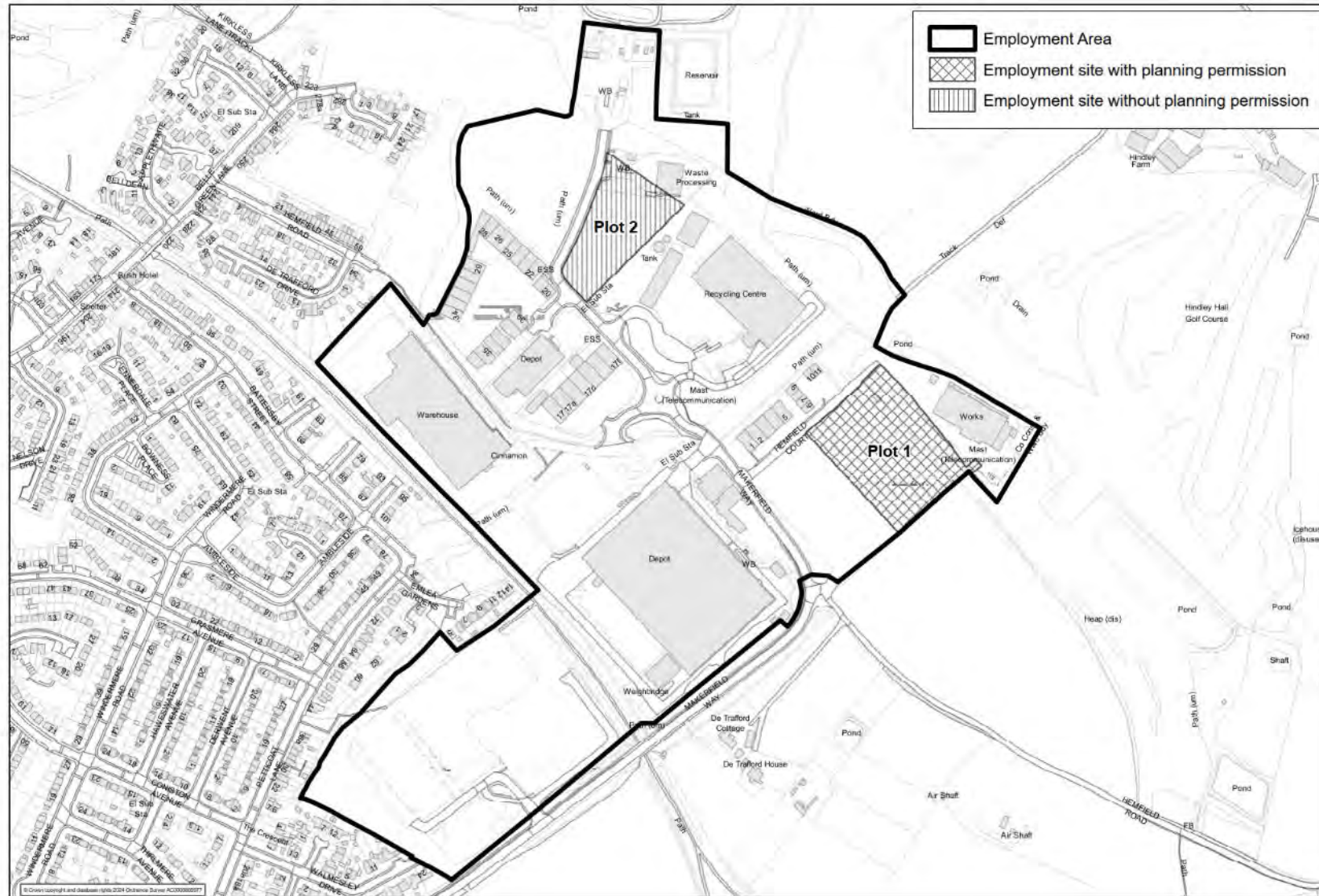
Employment Area: EM1A.14 Hindley Green Business Park, Leigh Road

1:4,250 




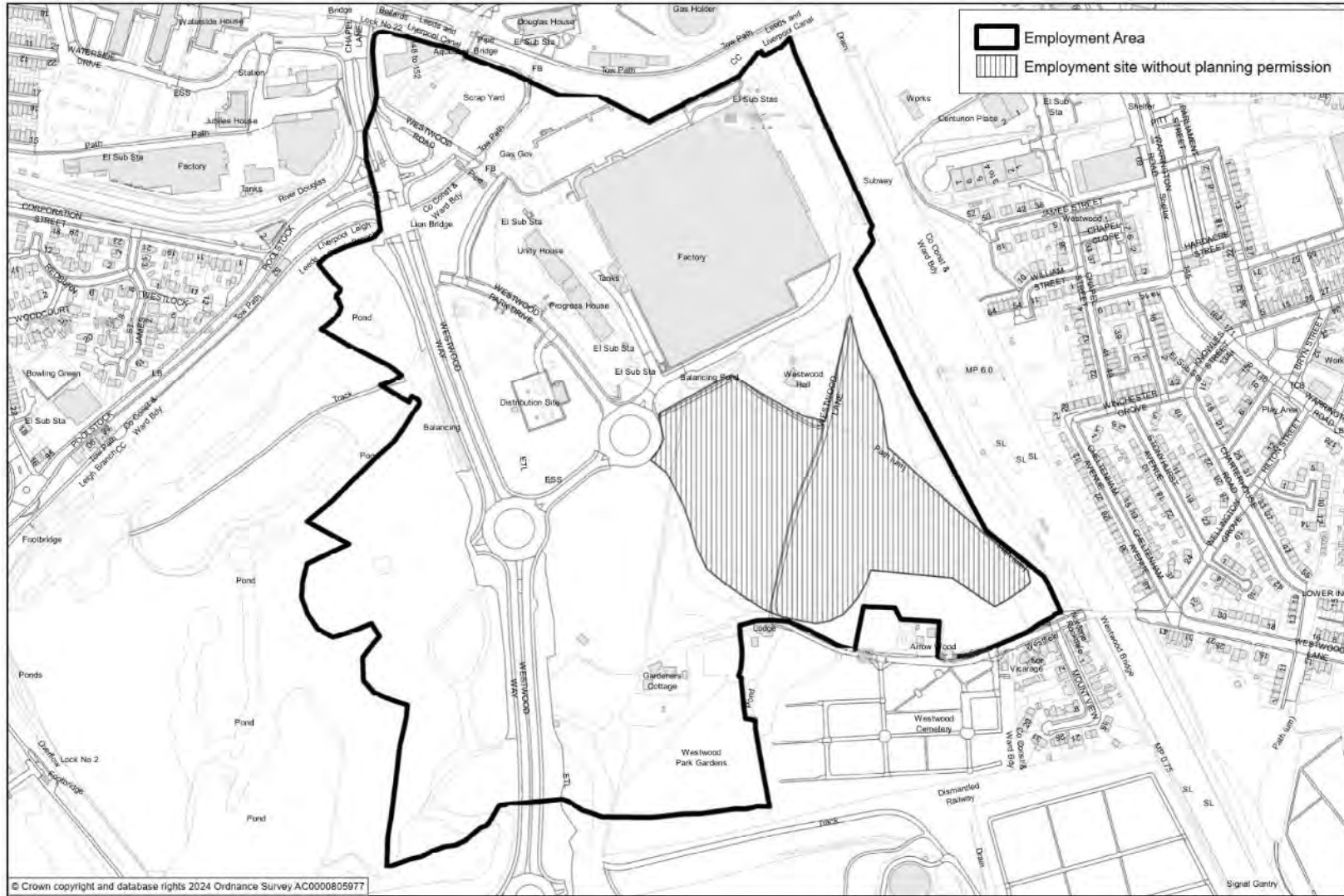
Employment Area: EM1A.16 Makerfield Way Ince

1:4,500 



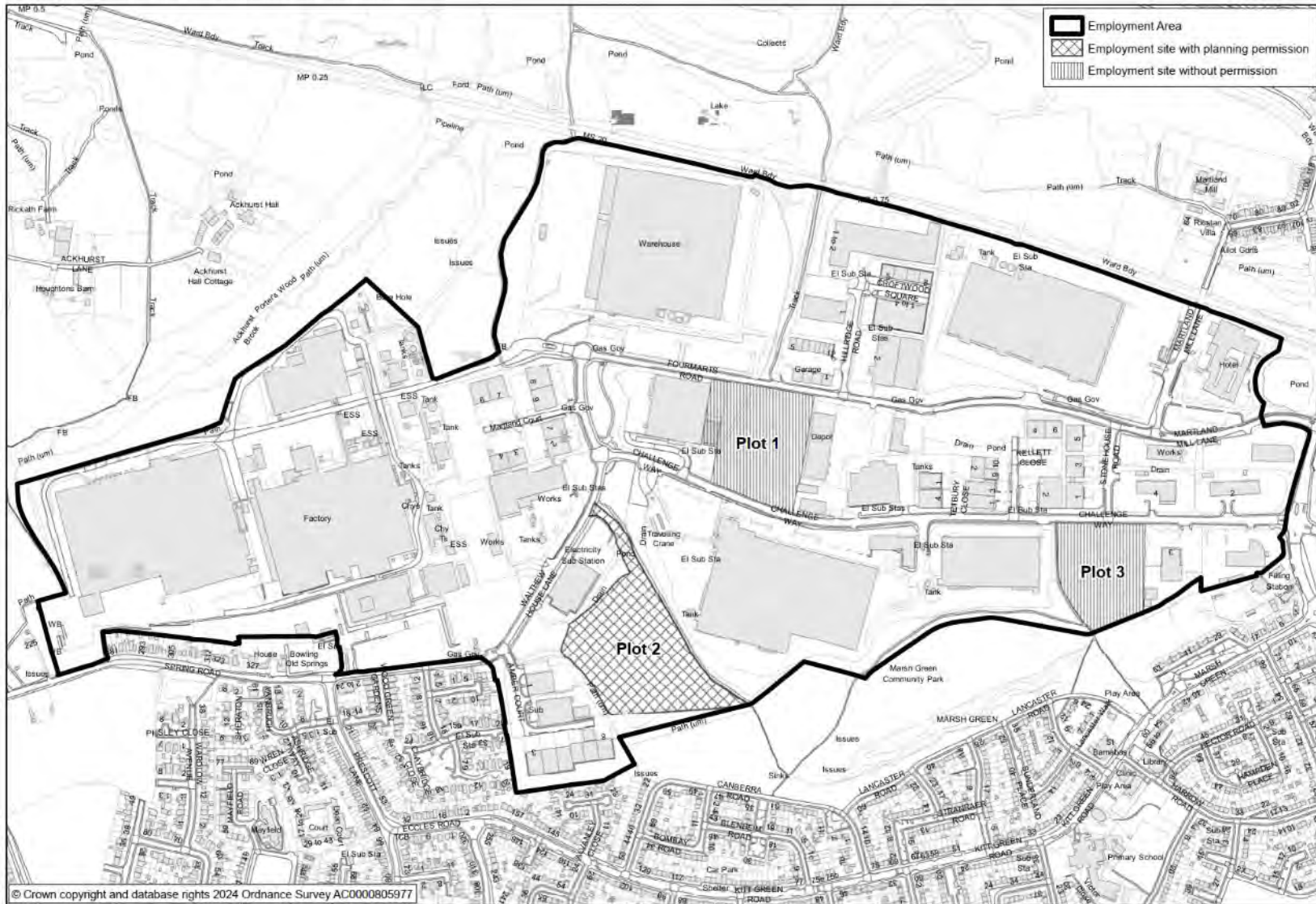
Employment Area: EM1A.20 Westwood

1:4,500 




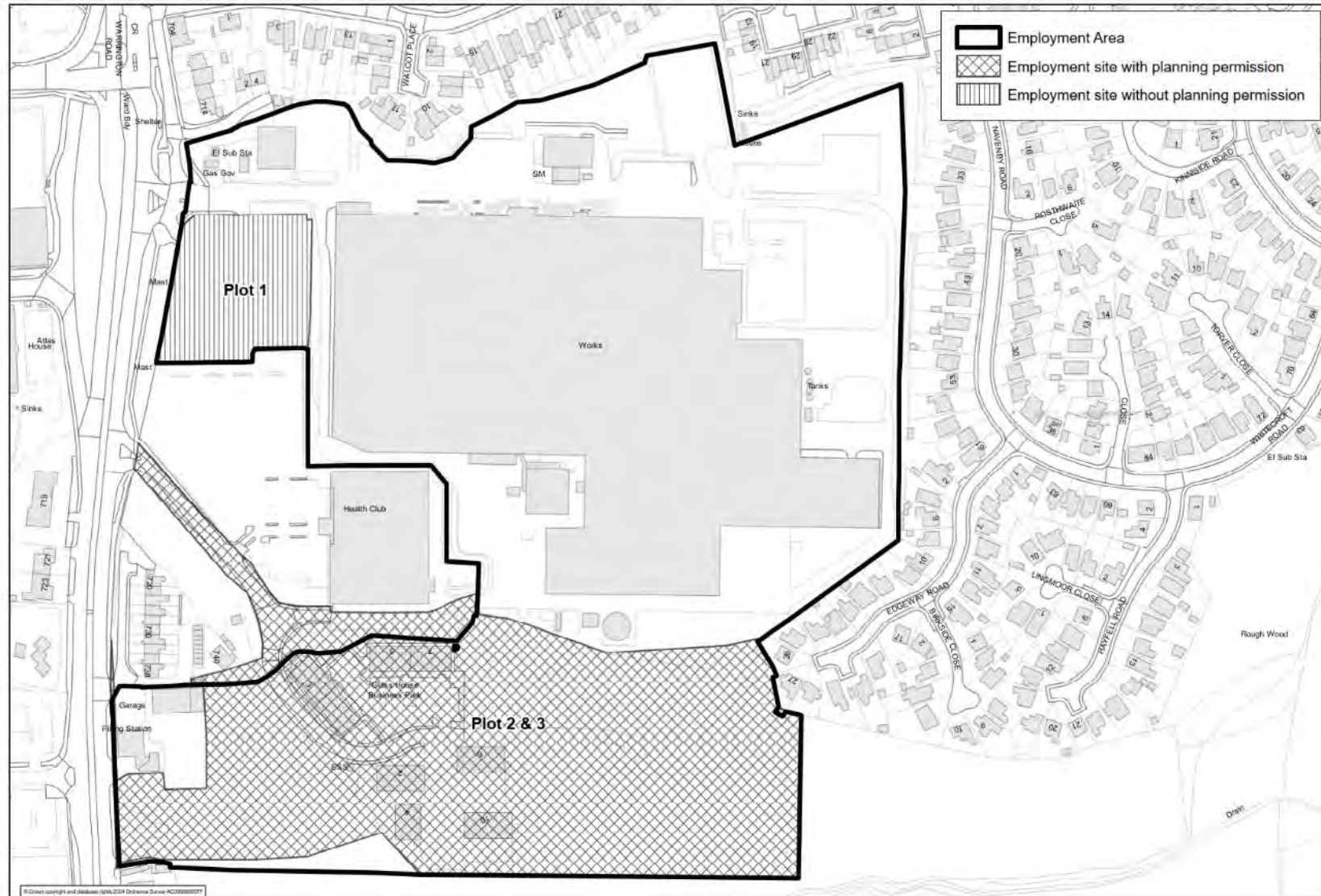
Employment Area: EM1A.25 Martland Park and Heinz

1:6,500 




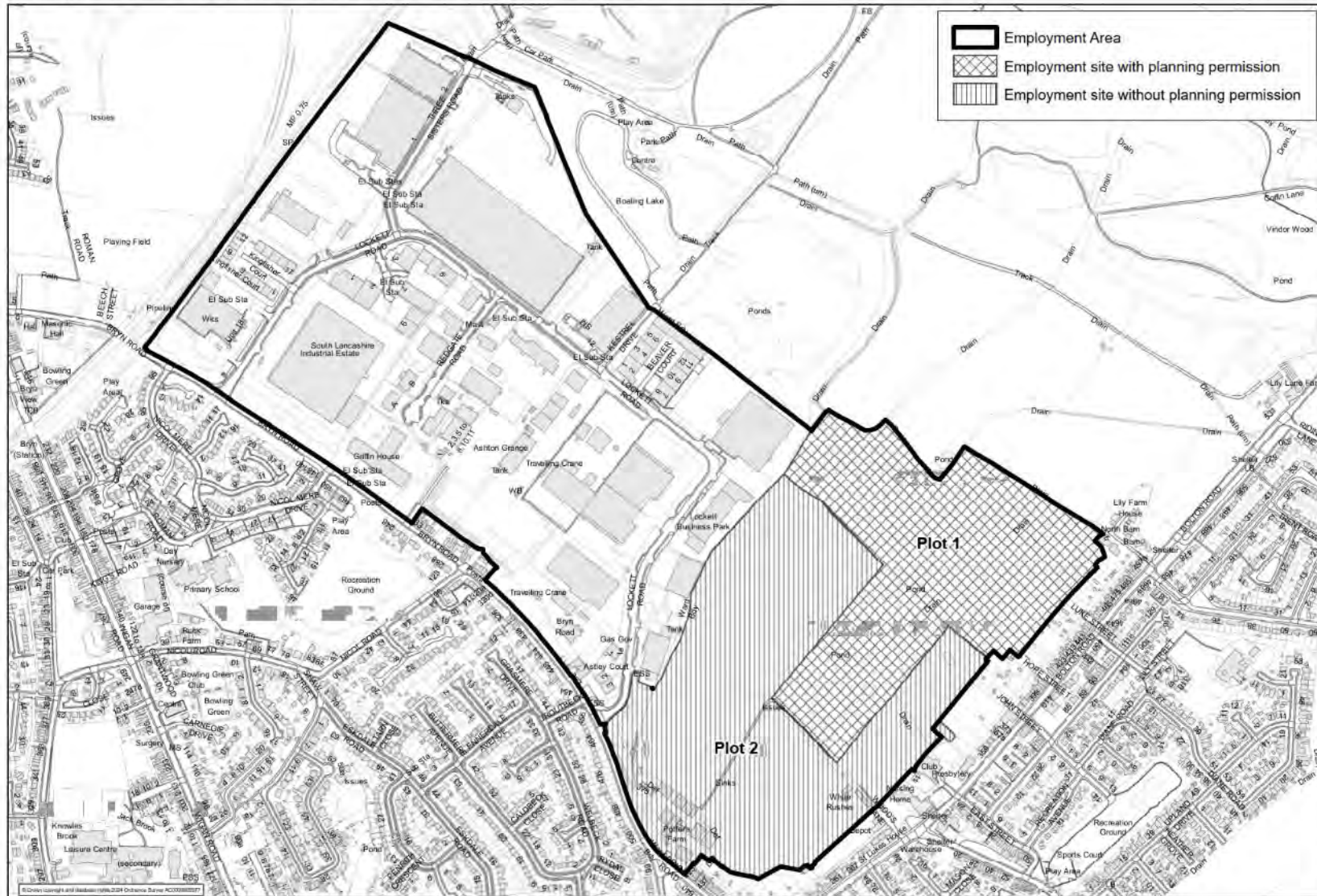
Employment Area: EM1A.32 Warrington Road Hawkey

1:2,500 



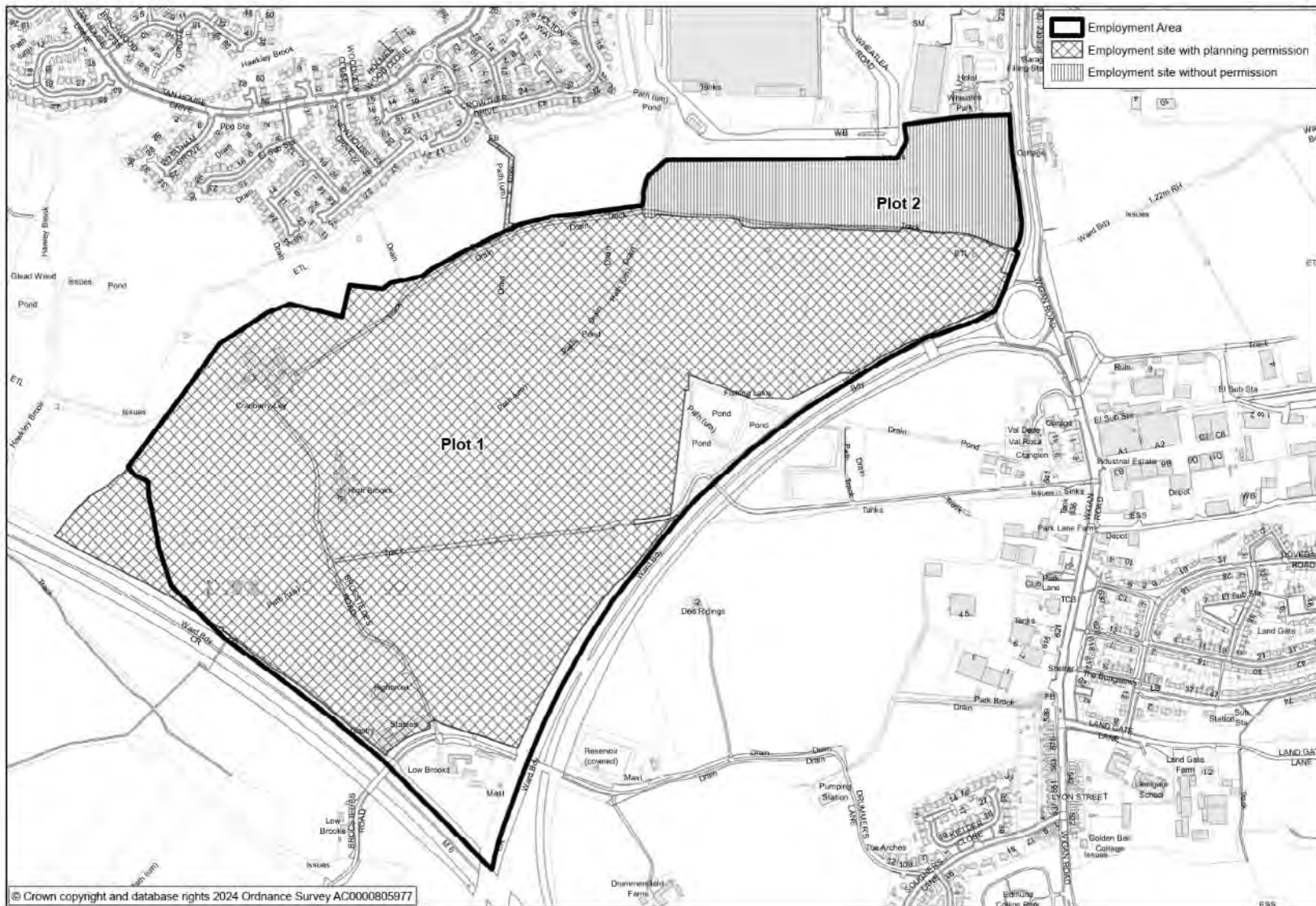
Employment Area: EM1A.36 South Lancashire Industrial Estate extension

1:7,500 



Employment Area: JPA 31 M6 Junction 25

1:6,750 



Employment Area: JPA 33 Pocket Nook

1:6,750 