



Comhairle Ceantair
Lár Uladh
Mid Ulster
District Council

Industrial Monitor October 2018 – Report on Summary of Findings

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1.0 Introduction

- 1.1** An industrial monitor was undertaken in 2014 and a position paper was completed in 2015 setting out a summary of the findings at that time, prior to the transfer of planning functions to council. One of the functions of the paper was to inform the newly formed Mid Ulster District Council on how the provision of employment / economic development land will be addressed in the future.
- 1.2** The research carried out suggested that the majority (78%) of the land zoned for industry / business use in the Cookstown Area Plan 2010 remained undeveloped, however all zonings with the exception of 17 were considered active, in that work has already commenced or a planning permission had been obtained or applied for on part or all of the land.
- 1.3** With regard to the land zoned for industry / mixed use in the Dungannon and South Tyrone Area Plan 2010 there was a similar trend with 85% of the zoned land remaining undeveloped with no development having taken place on sites DI03 and DI04. There are however, planning commitments on all or part of the sites including non-industrial uses on site DI05. The uptake of industrial land zoned in the Magherafelt Area Plan 2015 was the poorest of the district with only less than 4% of industrial land developed.
- 1.4** An updated Industrial Land Use Monitor has now been carried out in October 2018 and the results are presented in summarised form within this paper. The site reference numbers which have been listed in the tables below have come from each of the former district Area Plans.
- 1.5** There has been some progress in the development of industrial land throughout the district (as seen in **Figure 1** below), however, not all of the current land zoned for industry has been fully developed.

A graph showing the increase in percentage of land developed throughout the district since 2014.

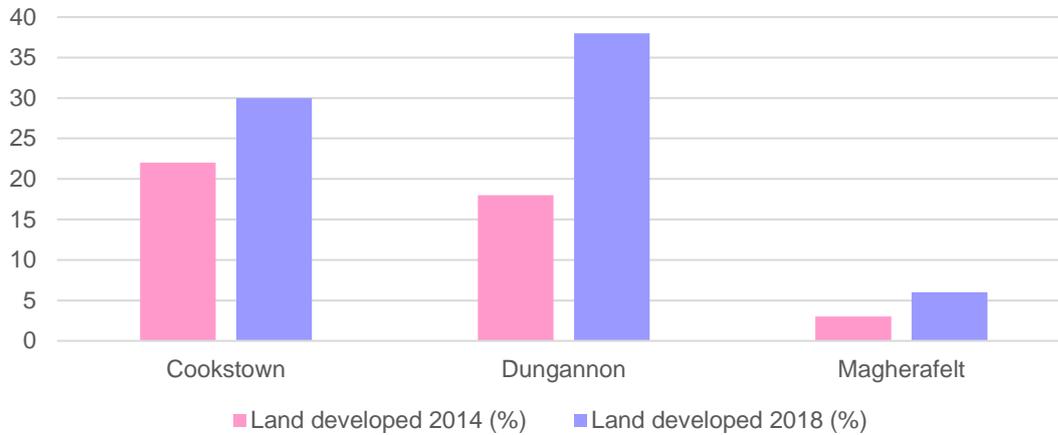


Figure 1 A graph showing the progress in the development of zoned land for industry throughout the district since 2014.

- 1.6** As part of the research conducted, a survey was carried out on the industrial land. This survey included a small questionnaire which was distributed to each business on both proposed and existing industrial land – this was done for each of the former districts – Cookstown, Dungannon and Magherafelt. The questionnaire included 3 questions:
- Please give a brief description of the activities which you are involved in e.g. manufacturing, repair, cleaning, retailing, storage, distribution etc.
 - How many employees are employed at this location
 - Have you any plans / desire to expand your expertise and if so what us the intended timescale for this.

A full site survey was conducted on the land, which is zoned for proposed industry and for all of the land within the district, which has been zoned as 'Existing Industry'.

2.0 Uptake of Land Zoned for Industry in Cookstown

2.1 Research carried out for the Industrial land use monitor 2018 suggests that there has been an increase in the uptake of industrial land in the Cookstown Area Plan 2010 with 29% of the zoned land now developed. The results are presented in **Table 1** below. For the purpose of the 2018 industrial monitor, the lands at Loughry have not been included.

Site Ref. No.	Location	Total Area (Ha)	Developed (Ha)	Remaining (Ha) 2018
I1	West of Sandholes Road	26.72	8.39	18.33*
I2	East of Sandholes Road	2.68	2.68	0
I3	Southeast of Sandholes Road	6.6	5.3	1.3
I4	Land between Coagh and Old Coagh Road	17.85	1.8	16.05
I5	Land South of Coagh Road	4.9	0	4.9
I6	Land East of Unipork Factory, Molesworth Road	6.3	0	6.3
I7	Land opposite of Unipork Factory, Molesworth Road.	0.52	0.52	0
TOTAL		65.57	18.69	46.88

*although land remains undeveloped at Kilcronagh Business Park (site reference I1), some of the land is committed to an end user and/or development has commenced.

Table 1 Table showing the uptake of industrial land and the industrial land remaining in Cookstown 2018.

2.2 It should be noted that there are presently accessibility issues for zonings I5 and I6 on the eastern side of the town as they are dependent on the Eastern Distributor Road.

2.3 The majority of the existing businesses operating on zoned land can be classed as A1, B1 and B2 under The Planning (Use Classes) Order (Northern Ireland) 2015. See **Figure 2** below, showing the main use class of each of the businesses within the Cookstown zoned land for industry.

Existing Use Classes on zoned land for Industry in Cookstown

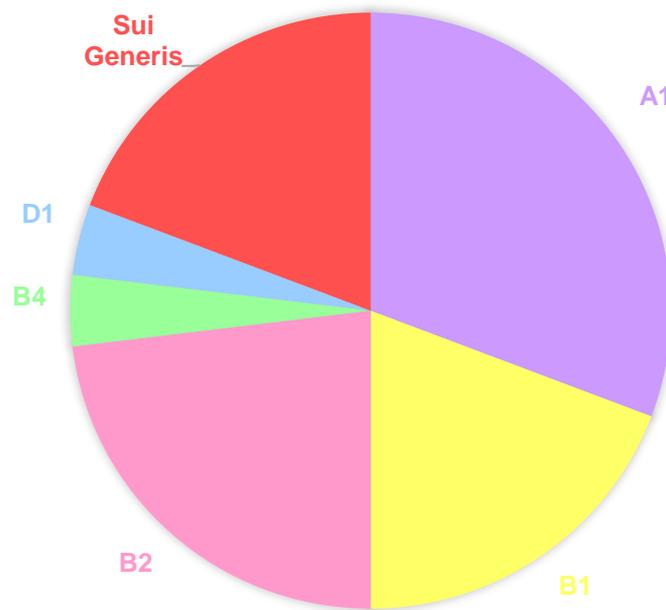


Figure 2 A pie chart showing the Use Classes on zoned land for industry in Cookstown 2018.

2.4 As seen in **Figure 2** above, A1 tends to dominate the uses within the land zoned for industry within the Cookstown Area Plan 2010 at 23%. It should be noted that the zoning within the plan is entitled 'Zoning for Industry / Mixed Business Use' which may be a reason for such a high volume of retail within industrial land throughout Cookstown.

3.0 Uptake of Industrial Land in Dungannon and Coalisland

3.1 There has been a noticeable increase in the uptake of industrial land in Dungannon and Coalisland since 2014. It is understood that there has been an increase of 20% with 38% of the industrial land which has been zoned in the Dungannon and South Tyrone Area Plan 2010 now developed. The results are presented in the **Table 2** below. The Plan has zoned 75ha of land for industry and business across five sites. Four of these sites are located within Dungannon and the fifth is at the industrial estate at Granville. Granville is a strategic location for industrial development where 40ha are zoned and is the focus of Invest NI's landholdings in the district. In Coalisland, 19ha of land are zoned across two sites (see **Table 2** below).

Site Ref. No.	Location	Total Area (Ha)	Developed (Ha)	Remaining (Ha) 2018
DI01	Granville Industrial Estate	40.15	23.55	16.6
DI02	Coolhill, south of Moy Park, Killyman Road, Dungannon	15.57	5.59	9.91
DI03	Far Circular Road, Dungannon	7.15	0	7.15
DI04	Adjacent to Tyrone Crystal, Coalisland Road, Dungannon	4.86	1.65	3.25
DI05	Ballygawley Road, Dungannon	7.52	0	7.52
CI01	Farlough Road, Coalisland	8.19	2.57	5.62
CI02	Gortgonis Road, Coalisland	9.57	2.34	7.23
TOTAL		93.01	35.7	57.28

Table 2 Uptake of industrial land and industrial land remaining in Dungannon 2018.

- 3.2 Although land remains undeveloped at Granville, the majority of the land has been committed to an end user and sites DI01 and DI02 have current and/or extant planning permissions for parts of each site.
- 3.3 It is important to note the access issues present in the Granville industrial estate. A 7.91ha portion of land zoned for industry to the north of Granville has access difficulties and therefore it could be argued that the prospect of developing this land at present is unrealistic. Due to this and existing commitments at Granville, the amount of land available to the market is substantially diminished to that identified in Table 2.
- 3.4 As with Cookstown, a survey of the industrial land was carried out in Dungannon which shows the main use of the business, the number of employees working there and if the business has any desire to expand at the premises. **Figure 3** below shows the main and current uses on the industrial land in Dungannon.

Use Classes on Industrial Land in Dungannon and South Tyrone

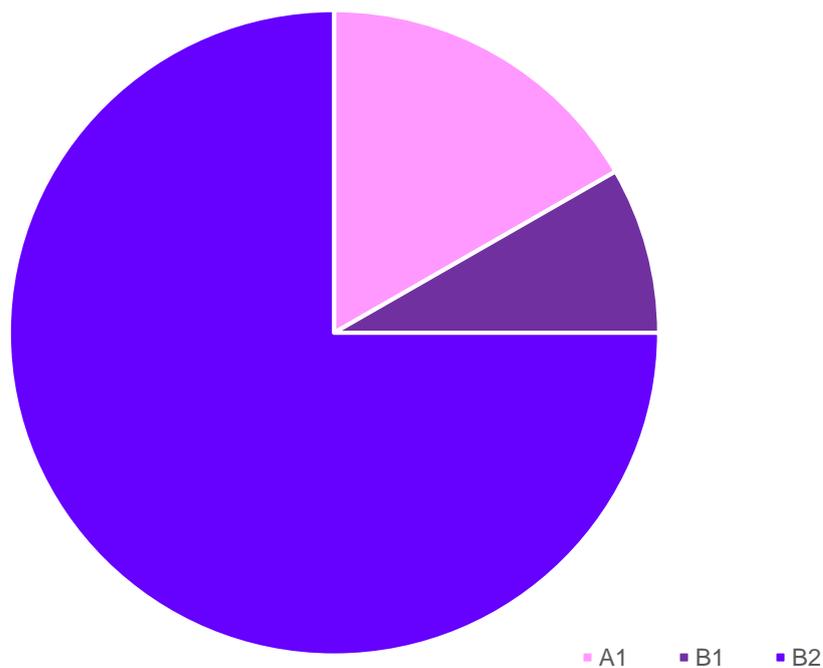


Figure 3 A pie chart showing the use classes on the industrial land zoned in the Dungannon and South Tyrone Area Plan 2010.

- 3.5 As is evident in **Figure 2** above, $\frac{3}{4}$ of the land zoned for industry identify as use B2 under The Planning (Use Classes) Order (Northern Ireland) 2015. The other uses were A1 and B1, however these were a minority with only 2 and 1 business identifying as these uses respectively.

4.0 Uptake of Industrial Land in Magherafelt (including Maghera and the Villages)

4.1 Magherafelt has shown the smallest increase in the development of its industrial land with only 6% of land zoned for industry being developed – this is only a 2% increase since 2014. The results are presented in **Table 3** below.

Site Ref No.	Location	Total Area (Ha)	Developed (Ha)	Remaining (Ha) 2018
MT26	Station Road, Magherafelt	0.9	0.09	0.81
MT27	Ballyronan Road, Magherafelt	1.9	0	1.9
MT28	Ballymoghlan Road, Magherafelt	5	0	5
MT29	Ballymoghlan Road, Magherafelt	3.63	0	3.63
MA10	Glen Road, Maghera	1.65	0	1.65
MA11	Moneyshavern Road, Maghera	6.92	1.31	5.61
BY10	Deerpark Road, Bellaghy	0.56	0	0.56
CN06	Bellshill Road, Castledawson	0.84	0	0.84
DN10	Magherafelt Road, Draperstown	1.97	0	1.97
DN11	East of Cahore Road, Draperstown	1.14	0.32	0.82
TE07	Lisnamuck Road, Tobermore	2.12	1.15	0.97
COU10	Creagh	19.3	0	19.3
TOTAL		45.93	2.87	43.06

*Building has commenced on part of the site at COU10, although it states here that the site is undeveloped.

Table 3 Uptake of industrial land and the industrial land remaining in the Magherafelt Area Plan 2015.

4.2 In the case of Magherafelt, the response rate to the industrial survey was not as high as that of Cookstown and Dungannon, therefore it is difficult to determine what the main uses are on the zoned land for industry as set out by the Magherafelt Area Plan 2015. A clearer picture of the main use classes will be provided if/when more businesses get back to the council with responses to the questionnaire.

5.0 Existing Industrial Land

- 5.1 As with Cookstown, a survey of the industrial land was carried out in Dungannon which shows the main use of the business, the number of employees working there and if the business has any desire to expand at the premises. **Figure 3** below shows the main and current uses on the industrial land in Dungannon.
- 5.2 A survey of the existing industrial land throughout the district was also conducted. The purpose of this was to gain a broader picture of the main uses which exist within the existing industrial land and to look at vacancy. Dungannon in particular had a high level of vacancy in some of the industrial estates surveyed.

Existing Industry Cookstown

- 5.3 The Cookstown Area Plan 2010 identified three areas of existing industrial land in Cookstown:
- Derryloran and Ballyreagh
 - Kilcronagh Business Park
 - Moleworth Street

These areas of existing industrial land can be found in **Map No. 36a** of the Cookstown Area Plan 2010.

- 5.4 The pie chart below (**Figure 4**) provides an overall indication of the predominant use classes which exist on the existing industrial land in Cookstown. As is evident, the most predominant use is B1 – Light Industry. There are some retail within the zoning, however, under The Planning (Use Classes) Order (Northern Ireland) 2015, the majority of uses fall under Part B – Industrial and Business Uses.

The Current Use Classes on Existing Industrial Land in Cookstown

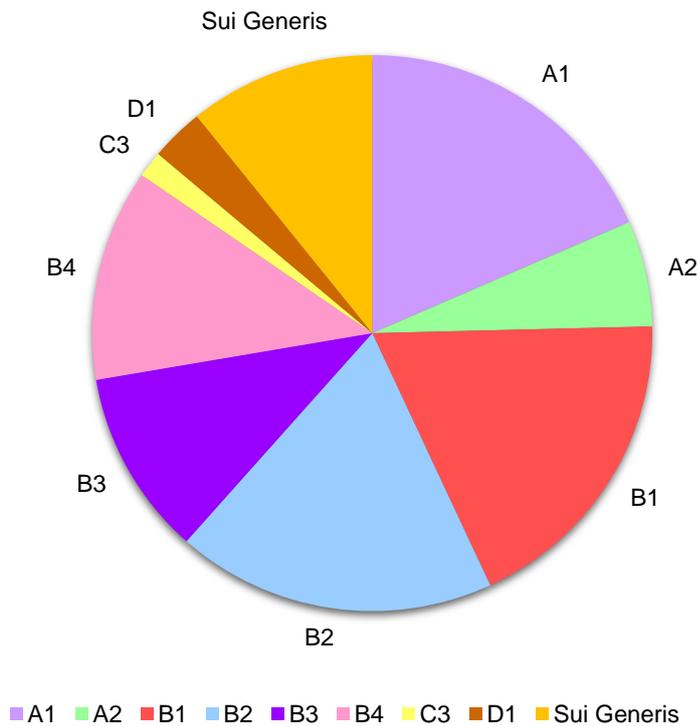


Figure 4 A pie chart showing the current use classes on existing industrial land in Cookstown 2018.

5.5 It is evident above that Industry and Business are the dominant uses (Section B of The Planning (Use Classes) Order (Northern Ireland) 2015. Part A of the Use Classes Order (Shopping and Financial & Professional Services) is also still dominant within the existing industrial land in Cookstown. A small number of businesses are Sui Generis while Storage and Distribution accounts for a small number of businesses on existing industrial land in Cookstown.

Existing Industry Dungannon

- 5.6** In terms of the existing industrial land in Dungannon (found in **Map No. 61a** in the Dungannon and South Tyrone Area Plan), light industry tends to be the most dominant use within the zoned land, as seen in **Figure 5** below. Retail appears to be the second most common use here. It should be noted that a number of businesses are 'mixed use' i.e. retail and light industry etc. which may be a reason for the high number of retail units in Dungannon. It should also be noted that only 18% of the surveys distributed were returned, therefore a more accurate picture of the existing industrial land can only be drawn once / if more surveys are returned.

Current Use Classes on Existing Industrial Land in Dungannon

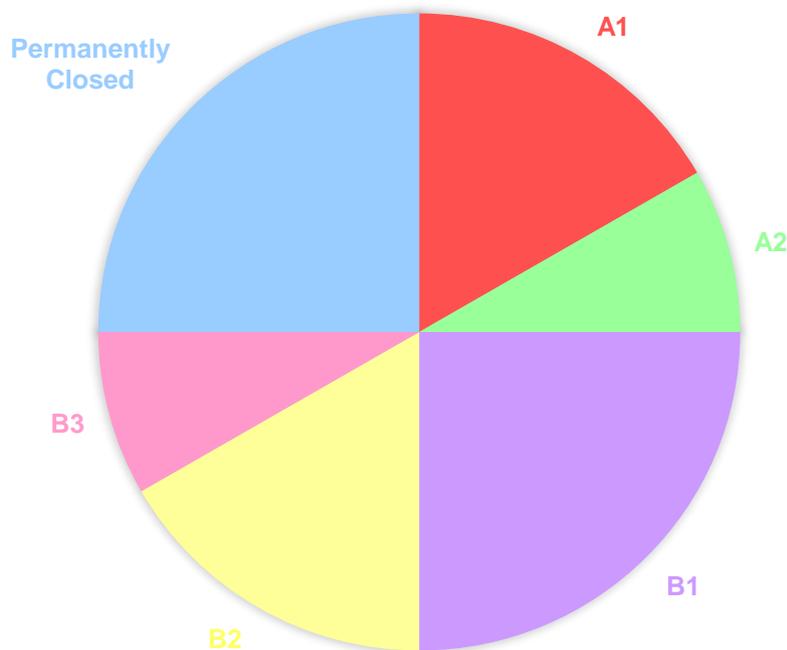


Figure 5 A pie chart showing the Current Use Classes on Existing Industrial Land in Dungannon 2018.

- 5.7** A number of businesses within the existing industrial land in Dungannon have closed permanently – these have been included because although the business has shut down, the land remains developed and these units should still be accounted for in the industrial monitor.

Existing Industry Magherafelt

5.8 In Magherafelt key locations identified as major areas of existing industry are:

- Station Road Industrial Estate
- Aughrim Road Industrial Estate
- Ballyronan Road
- Moneymore Road

These areas of existing industry are identified on **Map No. 5** of the Magherafelt Area Plan 2015.

This is also supported by major areas of industry at Creagh, Maghera and the villages.

Current Use Classes on Existing Industrial land in Magherafelt

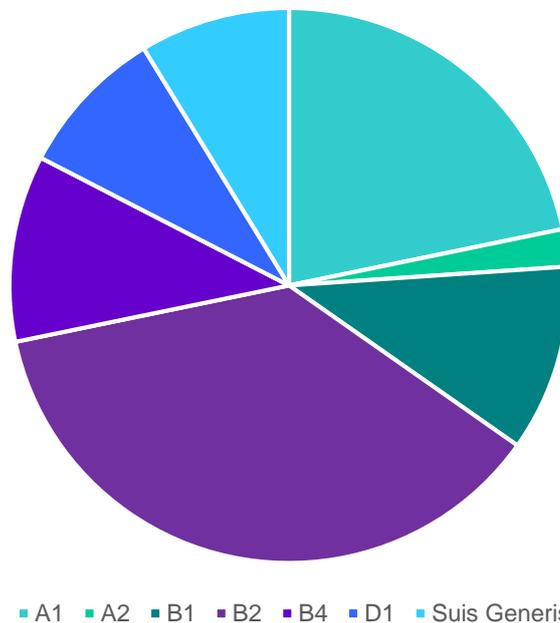


Figure 6 A pie chart showing the Current Use Classes on Existing Industrial Land in Magherafelt 2018.

5.9 As is evident above (**Figure 6**), light industry (Section B of the Planning (Use Classes) Order (Northern Ireland) 2015) followed by storage and distribution (Section D). Retail and financial services are less dominant in Magherafelt – like Dungannon, what retail does exist is a result of mixed use developments e.g. some businesses responded to the survey as storage and distributors as well as a retail outlet.

6.0 Conclusion and Recommendation

- 6.1 Members are requested to note the contents of this summary report which provides a picture of the uptake and availability of industrial land in our District at October 2018. Members are also requested agree that this report be placed on the Council website as background planning information and information which supports the position taken in our recently published Draft Plan Strategy particularly in relation to the need for an interim supply of economic development land at Dungannon and Granville.