



Derry City & Strabane
District Council

Comhairle Chathair
Dhoire & Cheantar
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DERRY CITY & STRABANE DISTRICT COUNCIL

LOCAL DEVELOPMENT PLAN (LDP) 2032



DRAFT PLAN STRATEGY

EVB 9a: Economic Development Land Monitor **2021, Updated** from EDLM 2017

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Purpose of Paper: The purpose of this report is to assess the findings of the 2021 Economic Development Land Monitor (EDLM) and consider how the findings have changed in the intervening years following the 2017 EDLM. The findings of the 2021 EDLM will influence future approaches to economic development zonings, policies and proposals, particularly for the purposes of Monitoring EDL uptake / supply-remaining (from the LDP dPS Baseline of 2017) and for the preparation of the LDP Local Policies Plan (LPP).

Content: The paper provides information on the following: -

- (i) Introduction;
- (ii) Policy Framework for Guiding Economic Development;
- (iii) Derry Area Plan 2011: 2021 Survey Findings;
- (iv) Strabane Area Plan 2001: 2021 Survey Findings;
- (v) District Analysis of Survey Data;
- (vi) Implications for LDP and Conclusion.

NOTE: This report is an update on the 2017 EDLM report; the maps from the 2017 report have not been re-done but text notes have been added where significant changes have happened.

Some of the key EDL uptake / availability points in the Monitor have been highlighted in red throughout the report, but this is not exhaustive.

1.0 INTRODUCTION

- 1.1 Derry is the second largest city in Northern Ireland and the fourth largest city on the island of Ireland, serving a City Region of up to 350,000 people. As recognized by Government in the Regional Development Strategy and Ireland's National Spatial Strategy, Derry provides key servicing and connectivity functions for the North West Region. This is the only functional economic city region of its scale on the island of Ireland which straddles a national jurisdictional border. The area also benefits from a large, thriving rural area with a number of key settlements with a strong local identity and centres of local commerce.
- 1.2 The Regional Development Strategy 2035 (RDS) provides a framework for strong sustainable economic growth across the region and recognises that a growing regional economy needs a coordinated approach to the provision of services, jobs and infrastructure. It seeks to promote a balanced spread of opportunities across Northern Ireland through a Spatial Framework that enables strategic choices to be made in relation to development and infrastructural investment. Policy RG1 aims to ensure an adequate supply of land to facilitate sustainable economic growth. The RDS also sets out an Employment Land Evaluation Framework to help enable a council to identify a robust and defensible portfolio of both strategic and local employment sites.
- 1.3 The Strategic Planning Policy Statement (SPPS) aims to facilitate the economic development needs of Northern Ireland in ways consistent with the protection of the environment and the principles of sustainable development. It sets out regional strategic objectives and policies in relation to economic development, industry and commerce.
- 1.4 With the population projected to grow and in order to realise the full benefits of a regional status, the region needs to maximise its strengths for communication, transport, tourism, economic productivity, knowledge, education and innovation.
- 1.5 In the preparation of the Local Development Plan (LDP), which will embody the core principles of securing the orderly and consistent development of land with the objective of furthering sustainable development and improving well-being, Council will take full account of the implications of proposed land use zonings, locations for development and settlement limits on the economy and employment within or adjoining the plan area. In line with the Strategic Growth Plan (Community Plan), the LDP allows a consideration of how we want our future

economy to look, as we seek to positively promote good standards of living, design and environment. It is necessary to consider how our LDP designations, zonings, proposals and policies can impact on our economic development.

- 1.6 The LDP will be informed by an annual *Economic Development Land Monitor* for Derry City and Strabane District which will detail the current supply of land (*developed and undeveloped*), land-use trends and vacancy rates.

Existing Area Plan Coverage in Derry and Strabane District

- 1.7 Area Plan coverage across the District is provided by the Derry Area Plan (DAP) 2011 and Strabane Area Plan (SAP) 2001. The key objective of the Derry Plan is to promote the sustainable development of the Derry City Council area by making provision for economic development while protecting its natural assets and man-made heritage for the enjoyment of future generations. In addition to the existing 'industrial areas' across the former Derry District Council area, 209.1 hectares of land was zoned to facilitate future industrial development. Similarly, the Strabane Area Plan (SAP) 2001 sets out the policies and proposals relating to industry within the former Strabane District, including the allocation of sufficient land to meet the needs for industry within Strabane and the local towns and to encourage a high standard of environmental quality within industrial areas. In addition to the established industrial areas at Ballycolman and Dublin Road, 15 hectares of land was zoned in Strabane Town along with another 8 hectares in Sion Mills, Newtownstewart and Castlederg.

Purpose of the EDL Monitor

- 1.8 The aim of this Monitor is to identify the amount of developed industrial and economic development land and the supply of undeveloped land at a given date, as well as monitoring changes thereafter on a periodic basis. This Monitor will be linked with Council's GIS in order to produce a series of maps which will accompany the monitoring reports. This initial survey will establish a baseline which can be edited and updated in the following years using planning decision data from within the District. This baseline survey will identify the current level of land, in industrial and business use as well as the land available for further development including extant permissions, and provide a baseline position for future monitoring.

The purposes of the Monitor are to:

- Monitor industrial / economic development in our main settlements;
- Monitor progress of industrial / economic development in those settlements in accordance with the provisions of the existing development plans;
- Provide an up-to-date evidence base to support decision-making on planning applications;
- Provide information on the available potential for further industrial / economic development in settlements;
- Inform the preparation of the emerging Local Development Plan with regard to the allocation of land for industrial / economic development.

The report will enable the Council to:

- Analyse use trends and assess the on-going suitability and viability of these areas for different types of employment provision;
- Analyse vacancy and market activity within the industrial / economic development land as a further barometer of economic performance.
- Analyse uptake of employment land on a District, Settlement and site by site level.

2.0 Methodology for Economic Development Land Survey 2021

- 2.1 PPS 4 *Industrial Development* (1997) was predicated on Northern Ireland having an industrial economy most notably based on shipbuilding, rope manufacture, textiles and heavy manufacturing. This was replaced in 2010 by PPS 4 *Planning and Economic Development* and represented an acknowledgement of the diminishing manufacturing base and growing service sector. While the current PPS provides a looser and more flexible approach to the changing economic climate, it still embodies many of the principles of the older version, in that it seeks to ensure that there is an adequate and suitable land supply. In highlighting the move away from traditional industries to a more service based one, Invest Northern Ireland (INI) in their October 2021 fact sheet publication for the District, state that the top investors in the District are Seagate Technology, Alchemy Technology Services, O’Neill’s Irish International Sports, Fin Tru and Ebrington Hotel.
- 2.2 Part B of the Planning (Use Classes) Order (Northern Ireland) 2015 sets out a broad description of ‘economic development’ land:-

Table 1: Planning (Use Classes) Order (Northern Ireland) 2015

| Use Class | Definition |
|---|---|
| Class B1 Business | (a) As an office other than a use within Class 2 (Financial, Professional and other services); |
| | (b) As a call centre: or |
| | (c) For research and development which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit. |
| Class B2 Light Industrial | Use for any industrial process which can be carried out without detriment to amenity by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit. |
| Class B3: General Industrial | Use for the carrying on of any industrial process other than one falling within class B2. |
| Class B4: Storage and Distribution | Use for storage or as a distribution centre. |

- 2.3 This report considers the land use needs and policies in relation to larger scale Economic Development uses in accordance with the definitions in PPS4: Economic Development and the Use Classes Order. Whilst previous plans will have referred to ‘industrial land’, the new definitions reflect that current/future needs are increasingly for light industry, business, distribution, technology, large

back-offices etc. 'Economic development' uses, as considered in this report and the accompanying chapter in the Draft Plan Strategy (dPS) are considered to be those uses defined under Part B Industrial and Business Uses in the Planning (Use Classes) Order (Northern Ireland) 2015 as above. For the remainder of this paper the survey findings will refer to '*economic development lands*' as opposed to '*industrial*' in order to avoid confusion.

- 2.4. Based on the 'industrial zonings' shown in the Derry Area Plan 2021 and Strabane Area Plan 2001, sites which largely lie within defined settlement limits were visited. The 2021 Monitor was carried out during the month of December 2021 and involved on-site inspections with changes to the survey findings of 2017 survey being recorded. The Monitor also considered the classification of different business activities on these zoned and existing/ unzoned sites in accordance with Part B of the Use Classes Order as above.

Methodology

- 2.5 All sites in our 2 main settlements (Derry and Strabane) and other smaller settlements (e.g. Culmore, Eglinton, Castlederg, Newtownstewart and Sion Mills) which lie either within land zoned as existing or proposed industry/ economic development use within an existing statutory area plan, or within an established industrial estate or business park, will be monitored. Land already developed for non-industrial business uses within these areas will be recorded as land lost to non-industrial uses if they have planning permission for that use, or if that use has been established for more than 5 years.
- 2.6 Other sites currently used for industry/economic development and greater than 0.5ha may also be monitored. Some of these sites may include compatible sui generis uses such as car showrooms, scrapyards, and waste management facilities.
- 2.7 Car sales have appeared in various industrial sites. Depending on their nature some were categorized as retail, while others as B4 Storage and Distribution.

The Monitor will identify the following:

- Type of site (zoned/ unzoned)
- Site Area (zoned/ unzoned)
- Amount of land developed, under construction or undeveloped
- Type of business use class on site

- Floorspace and Site Area used (per business use class)
- Current development status (e.g. undeveloped site with planning permission)
- Name of businesses

2.8 Other sites within villages, small settlements and the countryside which have been developed or approved for use classes B1-B4, and which make a significant contribution to the local economy may be recorded for information only. This reflects the more flexible approach of PPS 4 for sites in villages and small settlements where zoning for industry/economic development purposes could inhibit flexibility.

Reports

2.9 The results of the Monitor can be produced upon request via a series of reports including:

- Land developed and remaining capacity within each town and for the whole Borough
- Land developed for industry/ business uses and remaining capacity within each identified site;
- Use classes for each identified site; for each settlement; and for the whole Borough;
- A report showing comparisons between 2003, 2017 and 2021 surveys (where possible)
- Land lost to non-industrial uses by settlement; and for the whole Borough;
- Survey by survey (biennial) report of land developed/ remaining within each site; within each town; and overall for the District;

Mapping

2.10 The site boundary of each monitored site has been plotted on GIS and is linked to 'Pointer' data from Land and Property Services (LPS) which will provide additional details against the registered address, as well as the ratable classifications and ratable value of the site/ building. For the purposes of the EDLM, floor space will be based on the gross area of each building surveyed rather than individual internal floor space layouts. This enabled maps of the zonings and established industrial/ economic development land to be produced to accompany the monitoring reports.

- 2.11 Measurements which have been calculated for each business/ land use are approximate measurements and will have variations with what has been measured e.g. building only, compound, parking. The approximate measurements provide an indication of whether there has been a change or not.
- 2.12 This report is an update on the 2017 EDLM report; the maps from the 2017 report have not been re-done but text notes have been added where significant changes have happened.

3.0 Former Derry City Council District – 2021 Survey Findings

3.1 The Derry Area Plan 2011 zoned land for industrial purposes in the principal city of the North West, Derry, in the villages of Culmore and Newbuildings and at two major locations, Campsey and Maydown. **In 2021 within the Derry District, 142.8 hectares of the 209.1 hectares (68%) zoned remain undeveloped.**

Table 3: Estimated Remaining Capacity (ha) on Zoned Land

| Settlement | Location | Area Zoned (Approx. ha) | Area Remaining Undeveloped (approx. ha) 2013 | Area Remaining Undeveloped (approx. ha) 2017 | Area Remaining Undeveloped (approx. ha) 2021 |
|------------------------------------|----------|-------------------------|--|--|--|
| IND 1 Culmore | Derry | 44.5 | 42.1 | 42.1 | 42.1 |
| IND 2 Skeoge | Derry | 30.2 | 15.9 | 15.9 | 13.5 |
| IND 3 Buncrana/Elagh Business Park | Derry | 14.4 | 10.2 | 10.2 | 2.9 |
| IND 4 Seagate | Derry | 4.2 | 0 | 0 | 0 |
| IND 5 Campsey | Derry | 21.1 | 13.4 | 13.4 | 13.4 |
| IND 6 Maydown | Derry | 79.3 | 65.3 | 65.3 | 65.3 |
| IND 7 Newbuildings | Derry | 13.5 | 5.6 | 5.6 | 5.6 |
| MU 1 Iona Park (Mixed Use) | Derry | 1.9 | 0 | 0 | 0 |
| Derry Total | | 209.1 | 152.5 (73%) | 152.5 (73%) | 142.8 (68%) |

3.2 Uptake of the zonings has varied between sites in Derry District, as indicated in the above table. It is noted that there has been **no significant development at IND 1; Culmore**. At the time of adoption of the Plan, this site accommodated the meat factory on a small part only (2.34ha) and in 2021 this again remains the only occupier. **IND 2 Skeoge has seen some development. 45% (13.5 ha) remains undeveloped in 2021 (52%/ 15.9ha in 2017)**. There was **significant development within IND 3 Buncrana Rd. / Elagh Business Park**. In 2017 71% (10.2 ha) was undeveloped. In 2021 there is now just 21% (2.87 ha) undeveloped. The 2021 survey data confirms that, as in 2017, **82% (65ha) of the zoning at IND 6 Maydown remains undeveloped** and around 64% (13ha) of the zoning at IND 5 Campsey remains undeveloped, (with 7ha of the zoning developed for Perfecseal). Around **42% (6ha) of the zoning remains undeveloped in IND 7 Newbuildings**.

3.3 Apart from Iona Park, the majority of development on zoned industrial land has been for light and general industrial uses, storage and distribution. Purpose-built office and business accommodation has also been developed at Skeoge. Buncrana Road has seen a number of units built including Enviro Car Parts and a large portion of the previously undeveloped land to the west (2.5 ha) cleared with rubble/hard standing laid as part of a phased development. This is in keeping with PPS4 which, in the main, promotes zonings to be for “economic development” needs rather than the previous “industrial zonings”. Other, non-conforming uses are also evident, for example within both the 2017 and 2021 surveys, retail uses were common, especially at IND 3 Buncrana Road and IND 7 Newbuildings.

3.4 Invest NI is a major public sector landowner within the District. Their holdings in Campsey, Skeoge, Maydown and Springtown total approximately 168 ha. 62% (95 ha) remains available for development at Campsey, Skeoge and Maydown by qualifying businesses with an approved business case.

IND 1 Culmore

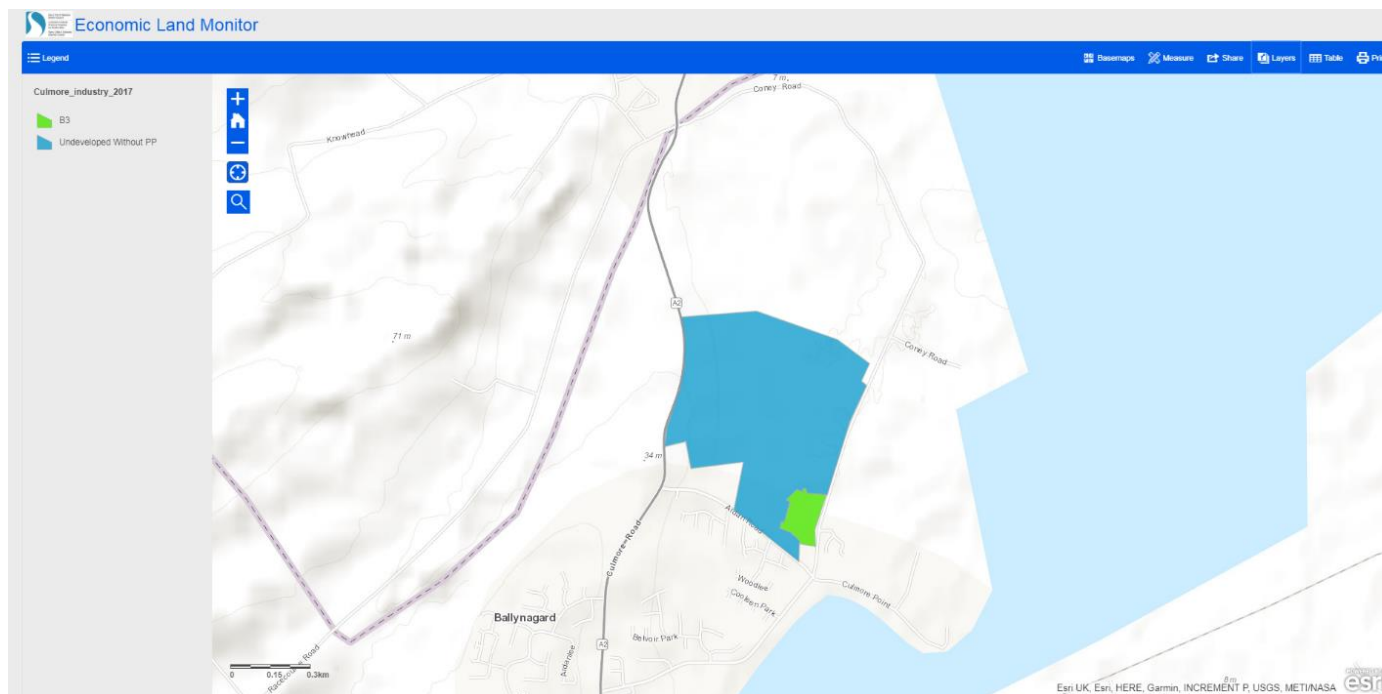


Figure 1 - IND 1 Culmore, 2017 map unchanged.

3.5 Figure 1 shows the zoned industrial land at Culmore. The site comprises 44.5 ha. There has been no change to this 2017 Map. The only use of the developed area is B3. The majority of the site (95% or 42.1 ha) is vacant land with no current planning permission. Just 5% is developed (B3).

IND 2 Skeoge

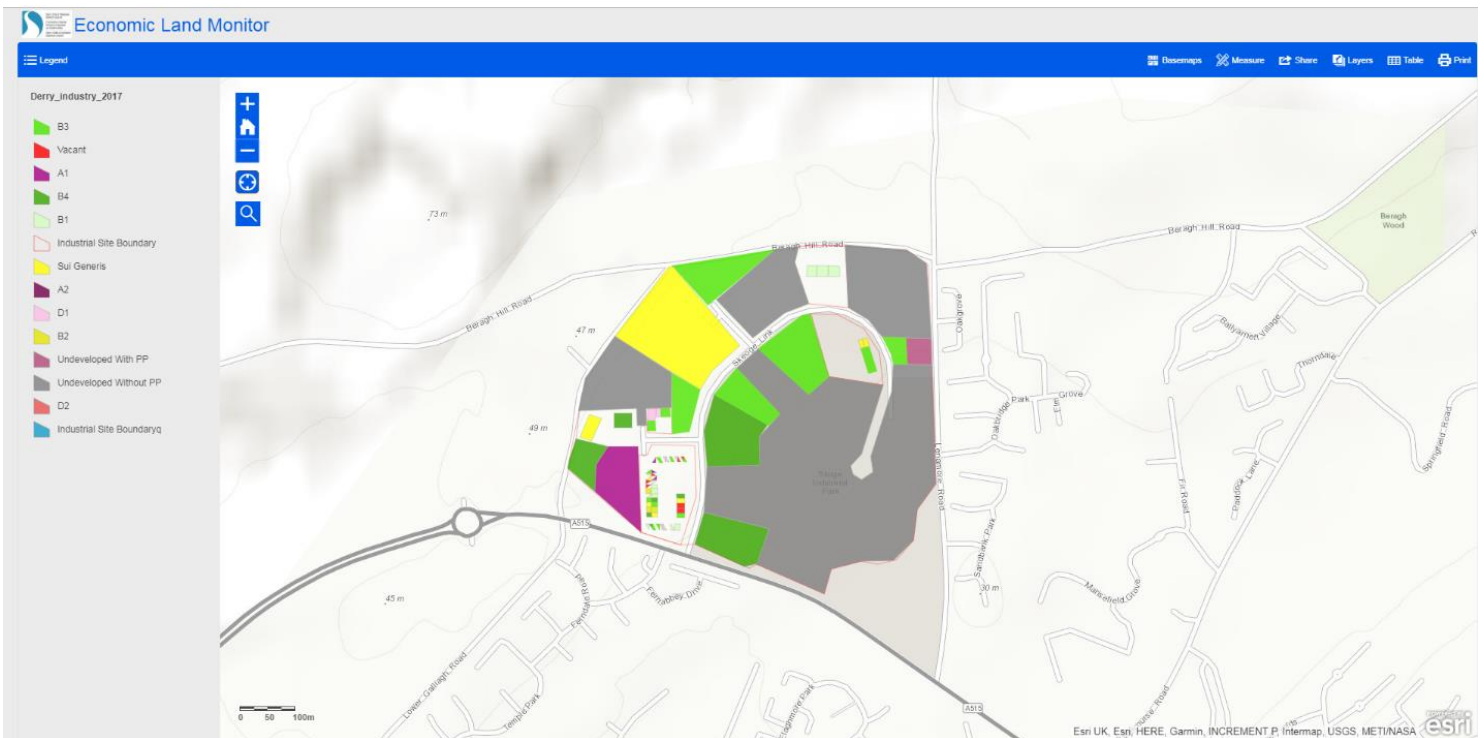


Figure 2- IND 2 Skeoge Industrial Estate, there have been significant changes since this 2017 map

3.6 Figure 2 above shows the zoned industrial land at Skeoge Industrial Estate. The site comprises 15.9 ha. There has been significant change to the 2017 map, as outlined below. The predominant use of the developed area in 2021 is B4 (Storage and distribution) making up approximately 51% of the industrial use on the site. 62% was recorded in this use class in the 2017 EDLM. The remaining uses are; B3 (General Industry) (25% in 2021 reduced from 32.1% in 2017 Monitor). Other uses saw a slight increase from 2.3% in 2017 to 2.8% in the 2021 monitor. B1 Offices increased from 2.2% in 2017 to 4.7% in 2021. Vacant Buildings have reduced from 1% to 0.4% and B2 (Light Industry) accounts for 13% of the land use within the 2021 Monitor. Vacant undeveloped land without planning permission made up most of the site in 2017 (64% or 15.9 ha). This is reduced to 43% vacant undeveloped land in the 2021 EDLM (13.5 ha). Three new units have been built including a Data Storage Centre to the east of the

zoned land. Adjacent to this is another new unit 'Glentauras House'. A storage unit has been constructed on previously undeveloped land between TMC Gas and Fast Technologies. Planning permission has been granted for a warehouse and storage unit adjacent to McDaid's Bakery and within undeveloped land (accounting for 7% of the reduction in the amount in the amount of undeveloped land since the 2017 EDLM).

IND 3 Buncrana Road/Elagh Business Park



Figure 3 - IND 3 Buncrana Road, there have been significant changes since this 2017 Map

3.7 Figure 3 above shows the zoned industrial land at Buncrana Road/ Elagh Business Park. The site comprises 14.4 ha. There have been significant changes to the map from 2017 (see below). The main use of the developed area in 2021 is B3 (General Industry) accounting for 50.9% of the site. In comparison the 2017 EDLM recorded no land in that use. In 2021 B4 Storage and Distribution uses account for 22% (49% in 2017) and 22.6% is recorded as other uses (44% in 2017). B1 Office Use in 2021 accounts for 0.5% and vacant units' account for 2.9% (7% in 2017). A number of new units have been constructed since 2017 including Atlantic Parcel Service in between Elagh Business Park 1 and 2 and a large unit and compound for Enviro Car Parts located NW of Elagh Business Park 1. Adjacent to Enviro Car parts to the NW a large parcel of previously undeveloped land has been cleared and levelled with rubble/hardstanding laid as

part of a phased approval for the site. These sites account for 2.5 ha of land which is now considered developed for the purposes of the EDLM 2021. A large storage unit has been constructed to the west NMD Autos. A large portion of the site is still vacant undeveloped land and accounts for 39.3% of the site or 2.87 ha (was 75% in 2017 or 10.2 ha).

IND 4 Seagate

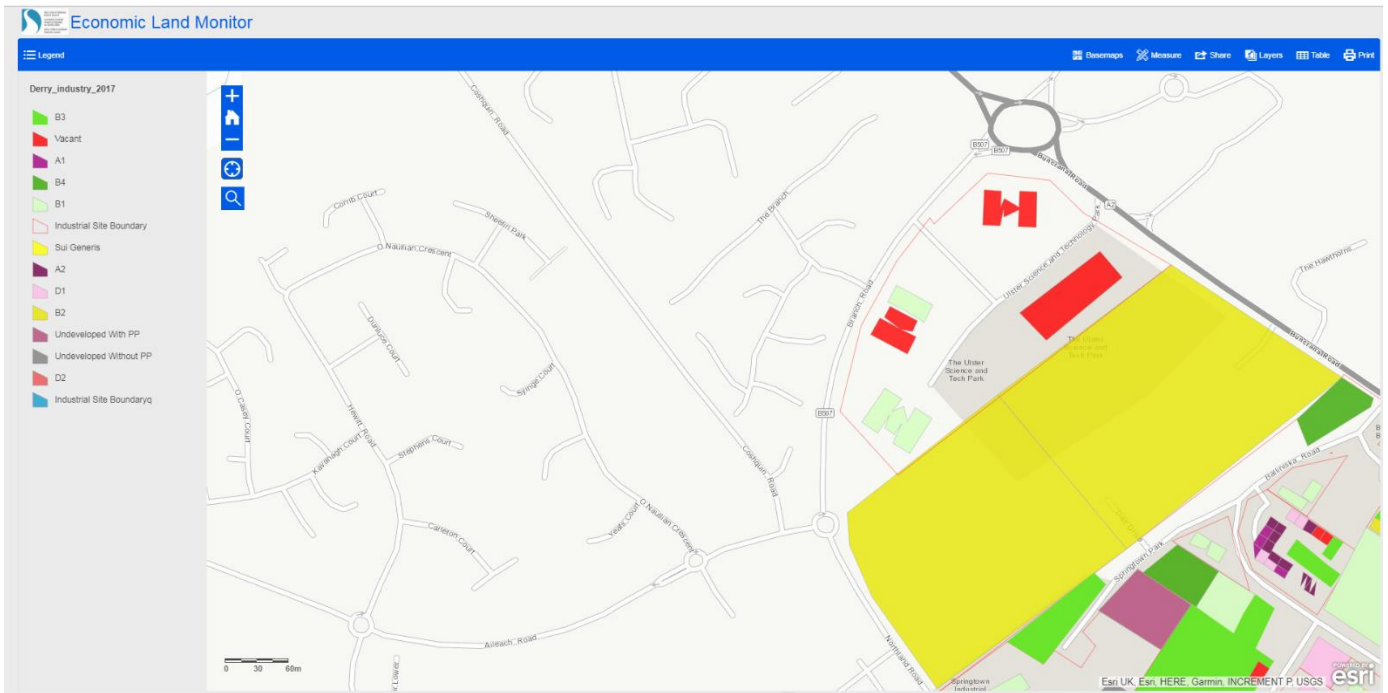


Figure 4 – IND 4 Seagate. There has been no changes since this 2017 map

3.8 Figure 4 above shows the zoned industrial land occupied by Seagate Technology. The site comprises 4.2 ha. There has been no change to the situation in 2017. The zoning refers to half of the site shown in figure 4. The zoning is the land formerly occupied by the City of Derry Rugby Club and approximately covers 4.37 Ha. The predominant and sole use on the zoned site is B2 light industry. The zoned area is considered to be fully developed, having no available vacant land for development.

IND 5 Campsie

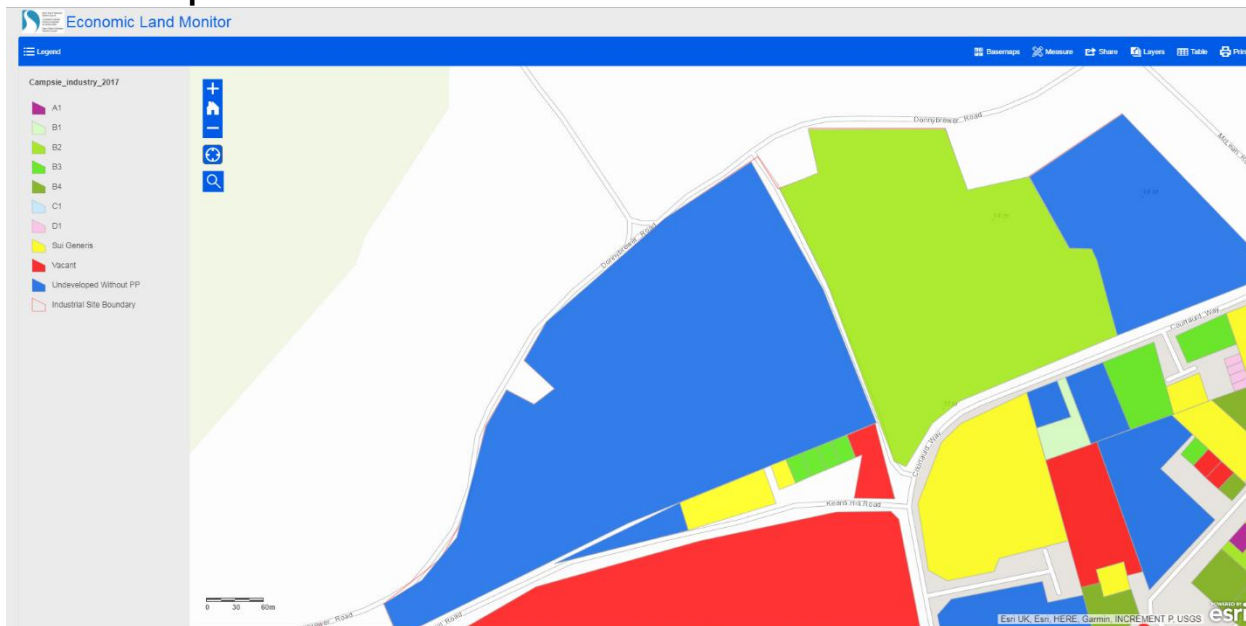


Figure 5 – IND 5 Campsie Industrial Estate- there have been changes since this 2017 map.

- 3.9 Figure 5 above shows the zoned industrial land at Campsie Industrial Estate (north of Kean’s Hill Road and McClean Road). The site comprises 21.1 ha. 64% of the site is undeveloped vacant land available for development (13.4 ha). In 2017 for the remaining developed area, 90% was in B2 use and 10% had been lost to other uses (not economic development uses). In 2021 the main use of the developed area is general industry (B1) making up 47% of the whole site. The other main industrial uses B2, B3 & B4 make up another 17%, with B3 (General Industry) making up the largest proportion. Land lost to other (non-economic development) uses occupies 25% of the site and 10% is vacant buildings.

IND 6 Maydown

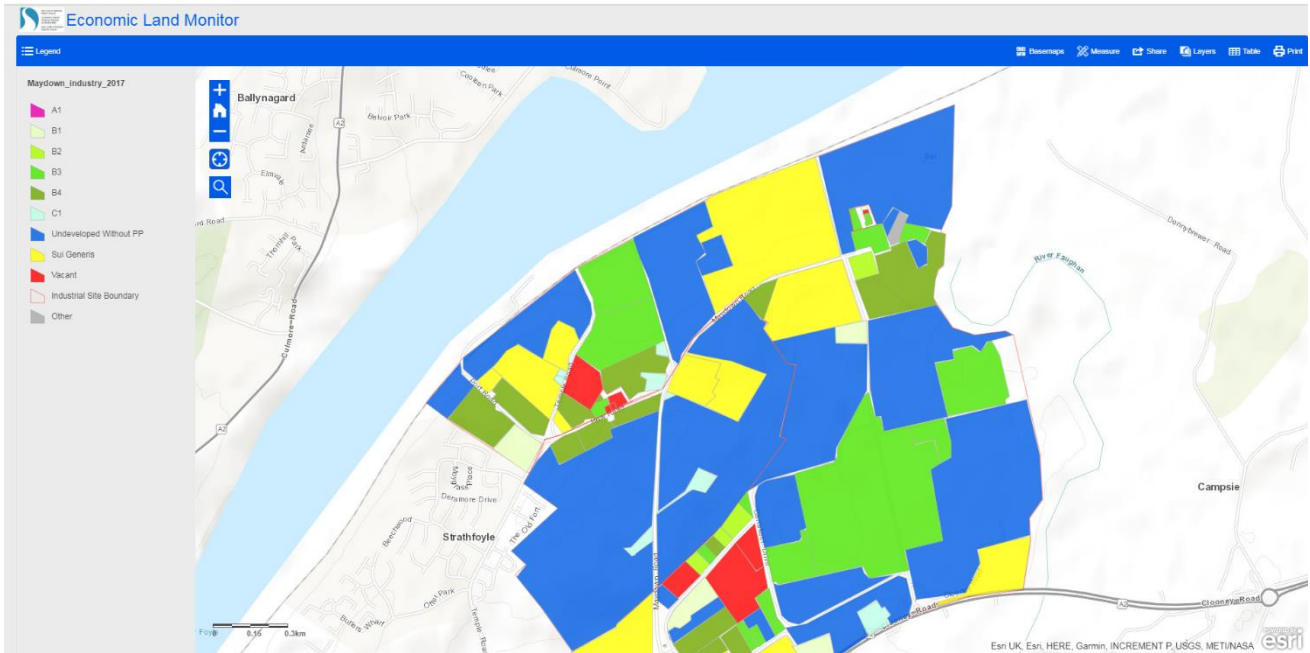


Figure 6 - IND 6 Maydown- there has been no change since this 2017 Map

3.10 Figure 6 above shows the zoned industrial land at Maydown. The site comprises 79.3 ha. There has been no change since the situation in 2017. The middle section of the Maydown site is zoned, whereas the rest of the site is considered as existing industrial land. 85% of the zoned area (65.3 ha) is vacant undeveloped land with no current planning permission and available for development. 15% of the site is developed. The predominant use of the zoned developed area is land lost to other development (over half of the developed land). The main industrial use is B4 storage and distribution approximately making up a third of the developed area.

IND 7 Newbuildings

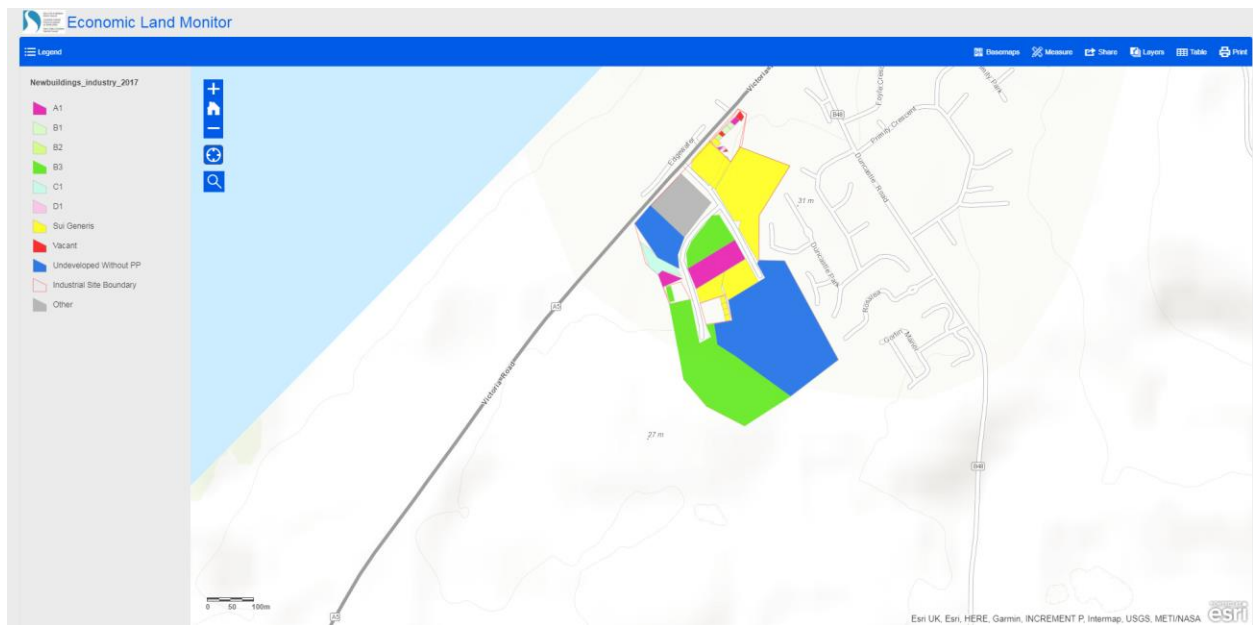


Figure 7 - IND 7 Newbuildings- no change since this 2017 map.

3.11 Figure 7 above shows the zoned industrial land at Newbuildings. The site comprises 13.5 ha. There have been no changes since the situation on the 2017 map. 41% of the site (5.6 ha) is still vacant land available for development. The main use of the developed area is still B3 General Industry (half the developed area). B1 office and B4 storage and distribution uses cover 42% of the developed land and vacancy accounts for 1.4%.

MU 1 Iona Park



Figure 8 - MU 1 Iona Park- No change since this 2017 Map.

3.12 Figure 8 above shows the zoned mixed use Iona Park. The site comprises 19 ha. There has been no change since the situation in 2017. The main land use in the developed area is considered to be land lost to other development, which refers to the Iona Park housing estate (93% of the developed area). The main industrial area of the site comprises B1 offices and B3 General Industry which make up 4% of the developed area. Vacant buildings and land lost to other uses (no-economic) uses make up the remaining 3%. The zoned site of Iona Park is therefore fully developed, having no available vacant land for development.

Other (Unzoned) Economic Development Land in Derry 2021 – Estimated Remaining Capacity

3.13 There is an additional approximately 103 ha of existing unzoned ‘industrial’, ‘employment’ or ‘economic development’ land on 14 sites across Derry City, 9 in the Cityside and 5 in the Waterside. **While uptake and occupancy is generally good, there remain approximately 16 hectares of undeveloped land and roughly 12 hectares of vacant units.** This situation is similar to in 2017 but there is now an extra 2 hectares of undeveloped land at Springtown.

Table 4: Remaining Capacity on Existing (Unzoned) Economic Development Land 2021

| Settlement | Location | Approx. Site Area | Approx. Site Area (ha) Undeveloped | Approx. Site Area (ha) ‘Vacant’ |
|-------------------|------------------------------------|-------------------|------------------------------------|---------------------------------|
| Derry - Cityside | Bay Road | 13.2 | 0 | 0.07 |
| Derry - Cityside | Lenamore | 0.79 | 0 | 0.025 |
| Derry - Cityside | Northland Road | 2.15 | 0.5 | 0.2 |
| Derry - Cityside | Pennyburn | 24.04 | 1.7 | 5.2 |
| Derry - Cityside | Rath Mor | 1.99 | 0 | 0.1 |
| Derry - Cityside | Seagate | 8.33 | 0 | 0 |
| Derry - Cityside | Springtown | 35.04 | 3 | 3.5 |
| Derry - Cityside | Ulster Science and Technology Park | 4.52 | 0 | 0.6 |
| Derry - Cityside | Fort George | 4.46 | 3.32 | 0 |
| Derry - Waterside | Altnagelvin | 6.86 | 0 | 1.5 |
| Derry – Waterside | Drumahoe | 6.43 | 6.4 | 0 |
| Derry – Waterside | Glendermott Road | 2.74 | 0.7 | 0 |
| Derry – Waterside | Glendermott Valley Business Park | 0.98 | 0 | 0.06 |
| Derry – Waterside | Trench Road | 0.68 | 0 | 0.4 |
| Total | | 111.51 | 15.62 | 12 |

3.14 It should also be noted that whilst some of the employment land is ‘developed’, there are some ‘vacant’ units e.g. Ulster Science and Technology Park in Derry or in other estates where the buildings are quite old and under-utilised.

Bay Road



Figure 9 - Existing Employment Land Bay Road- there have been some minor changes since this 2017 Map.

3.15 Figure 9 above shows the employment land at Bay Road in 2017. The site comprises 13.2 hectares. There have been some minor changes since 2017, as outlined below. The predominant use of the developed area is still 'other uses' (non-economic development) accounting for approximately half of the developed area (51.4% in 2017 and 53.1% in 2021). The other half of the industrial site comprises B1 Offices, B2 Light Industry & B4 Storage and Distribution and vacant buildings. This remains largely unchanged from 2017 Monitor. B3 General Industry uses are not present at the time of the 2021 Monitor, but in 2017 they accounted for 0.5% of the site. The existing employment land is not designated by an industrial zoning and is considered to be fully developed, as in 2017.

Lenamore

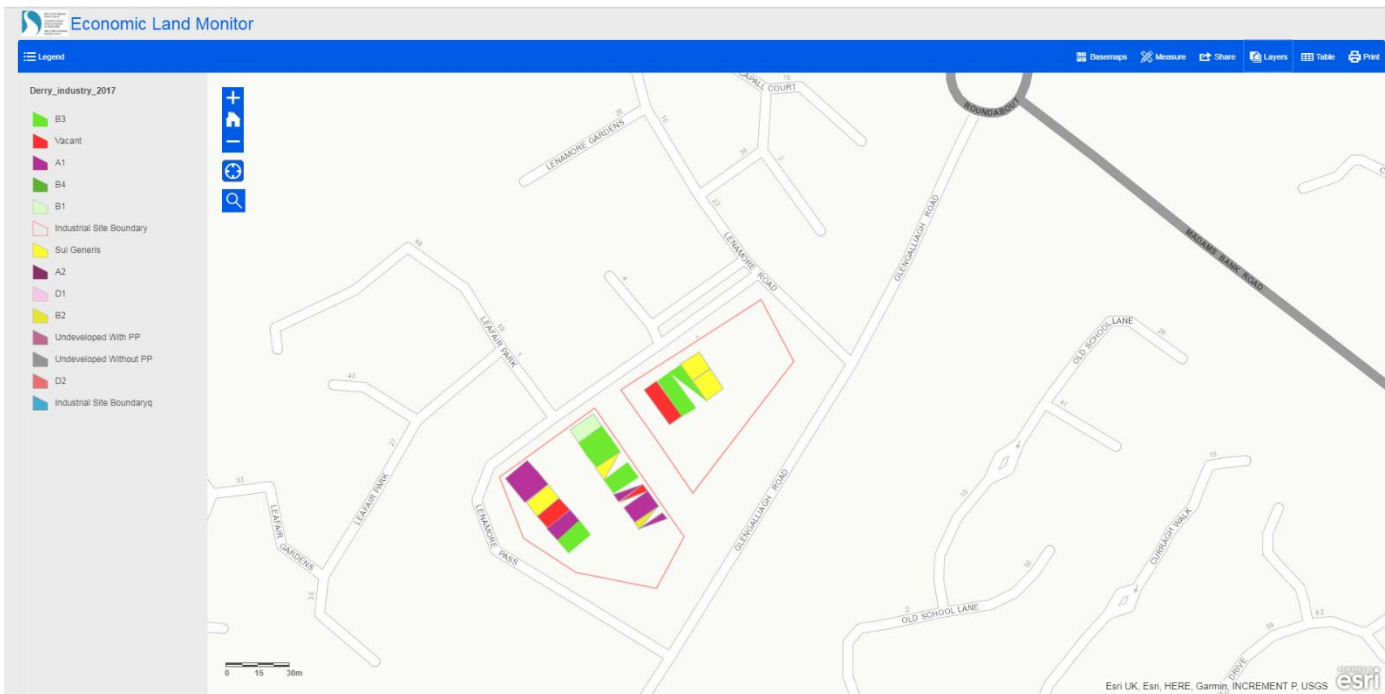


Figure 10 - Employment Land Lenamore- there have been changes since this 2017 Map.

3.16 Figure 10 above shows the existing employment land situated at Lenamore in 2017. The site comprises 0.79ha. There have been changes since the map above which are outlined below. 71.4% of the developed area has now been lost to other (non-employment) uses (45% in 2017). B1 Office, B2 Light Industry and B3 General Industry combined make up approximately 17% of the site in 2021 (35% in 2017) 10% of the site is vacant buildings (down from 10% in 2017). The existing employment land is not designated by an industrial zoning and is considered to be fully developed, having no available vacant land for development. This situation remains unchanged from the 2021 Monitor.

Northland Road



Figure 11 - Employment Land Northland Road – there have been some changes since this 2017 Map

3.17 Figure 11 above shows the industrial employment land situated at the Northland Road Industrial Estate in 2017, there has been some changes since this 2017 map was produced as outlined below. The site comprises 2.15ha. In 2017 vacant buildings accounted for 37% of the site. This has reduced to 28% in the 2021 Monitor. B1 offices, B2 light industry and B3 general industry accounted for 27% of the developed area and B4 storage and distribution was 24% in 2017. In 2021 B1 Offices, B3 General Industry & B4 Storage and Distribution account for 30% of the developed area and General Industry is the most prevalent of the main industrial uses (12.6%) in 2021. B2 Light Industry uses are not present in 2021, (2.2% in 2017). In 2021, 39.5% of the land has been lost to other (non-employment) uses and this has increased significantly since 10% in 2017.

Pennyburn

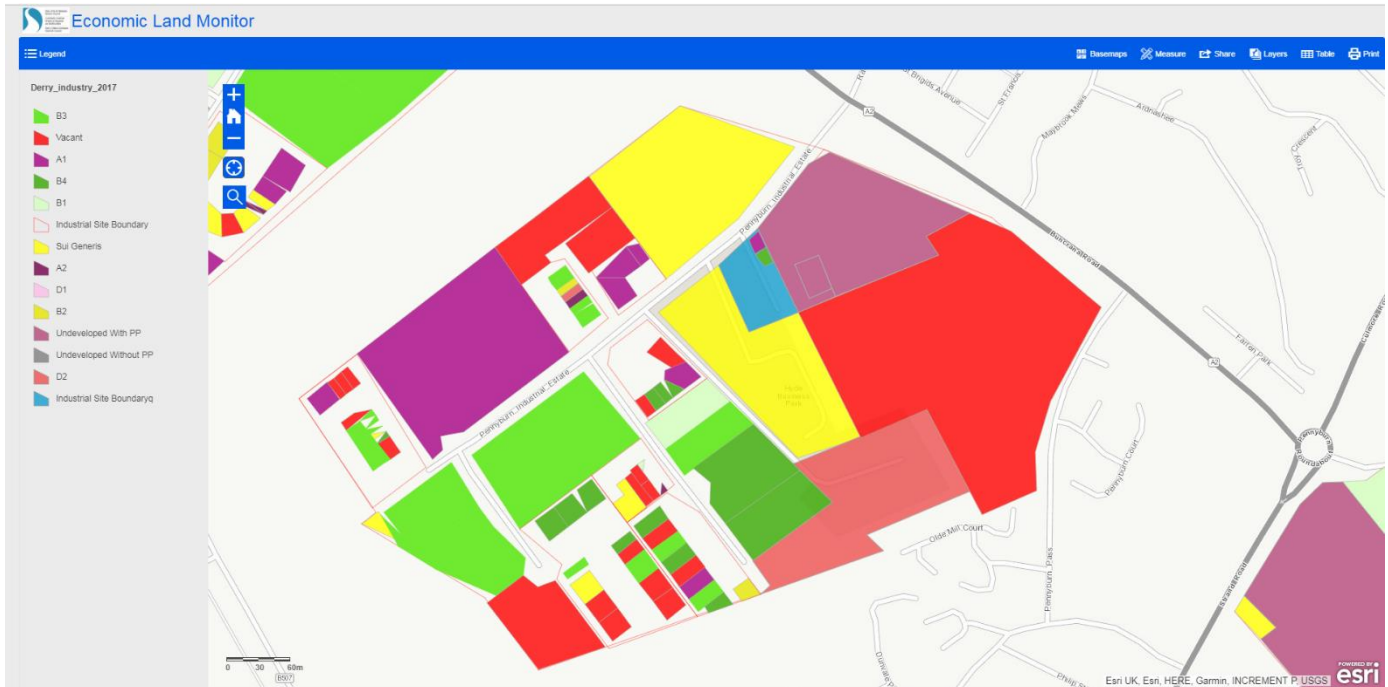


Figure 12 - Employment Land Pennyburn- there have been some changes since this 2017 Map

3.18 Figure 12 above shows the 2017 situation. There have been some changes since this map was produced as set out below. The site comprises 24 ha. Most of the developed area has been lost to other uses (41% of the site now and in 2017). In 2017 vacant buildings accounted for 35% of the developed area. By 2021 monitor the percentage of vacant buildings had fallen slightly amounting to 29.4% of the developed area. The main industrial uses B1 Office, B2 Light Industry, B3 General Industry & B4 Storage and Distribution combined account for 25% of the developed land in 2021, which has increased slightly from 2017 (23%) The existing employment land is not designated by an industrial zoning and 95% of the site has been developed. The remaining 5% is considered to be vacant land available for development (a reduction since the 9% in 2017).

Rath Mor

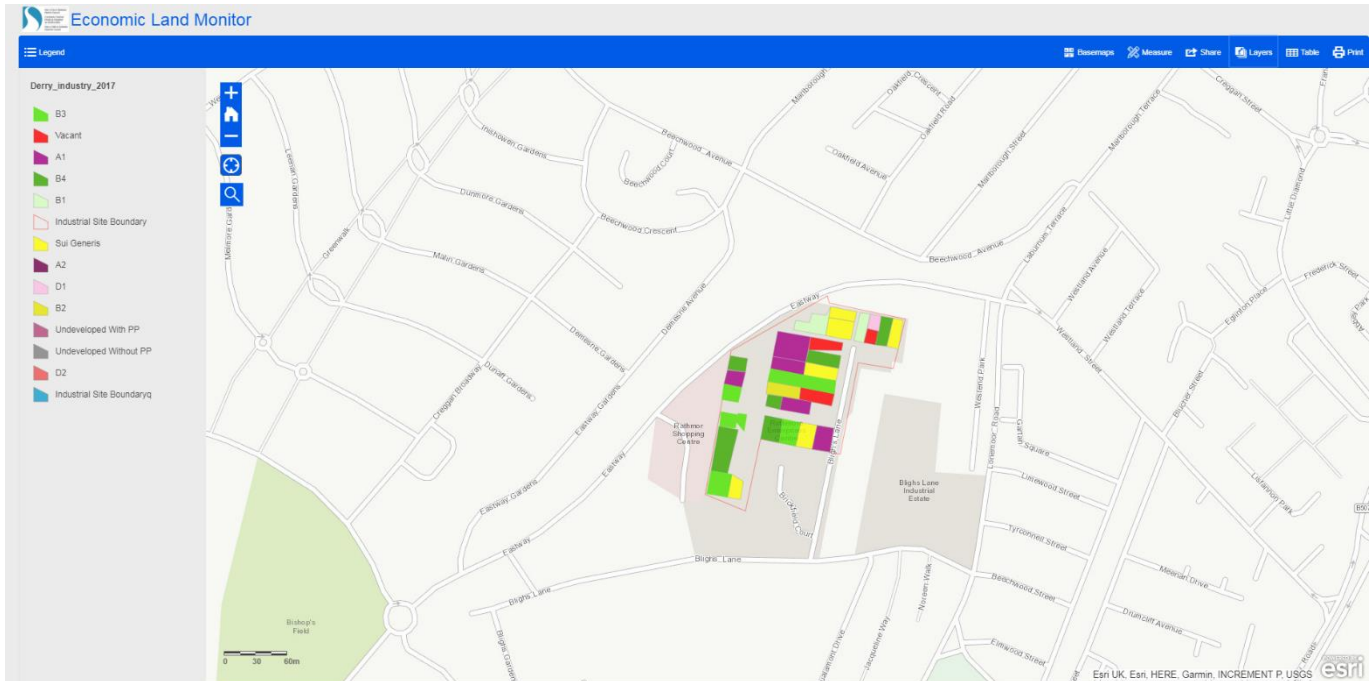


Figure 13 - Employment Land Rath Mor- there have been significant changes since this 2017 map.

3.19 Figure 13 above shows the existing employment land situated at the Rath Mor Business Park in 2017. The site comprises 1.99ha. The main use of the developed area is B3 General Industry approximately accounting for 18.9% in 2021, this is a slight decrease from 2017 (20.2%) B4 Storage & Distribution is the second largest occupier of the site making up 14.7% of the developed area in 2021, a slight decrease from 2017 (21.2%) The other main industrial uses B1 Office and B2 Light Industry combined amounts to 8.4% of the developed area (28.6 in the 2017 Monitor). 47.2% of the site has been lost to other (non-employment) uses (13.9% in 2017). The remaining 11.2% of the site comprises vacant units (8,3% in the 2017 Monitor). The existing employment land is not designated by an industrial zoning and is considered to be fully developed, with no available vacant land for development. Previously in 2017 74% of the site was developed.

Seagate

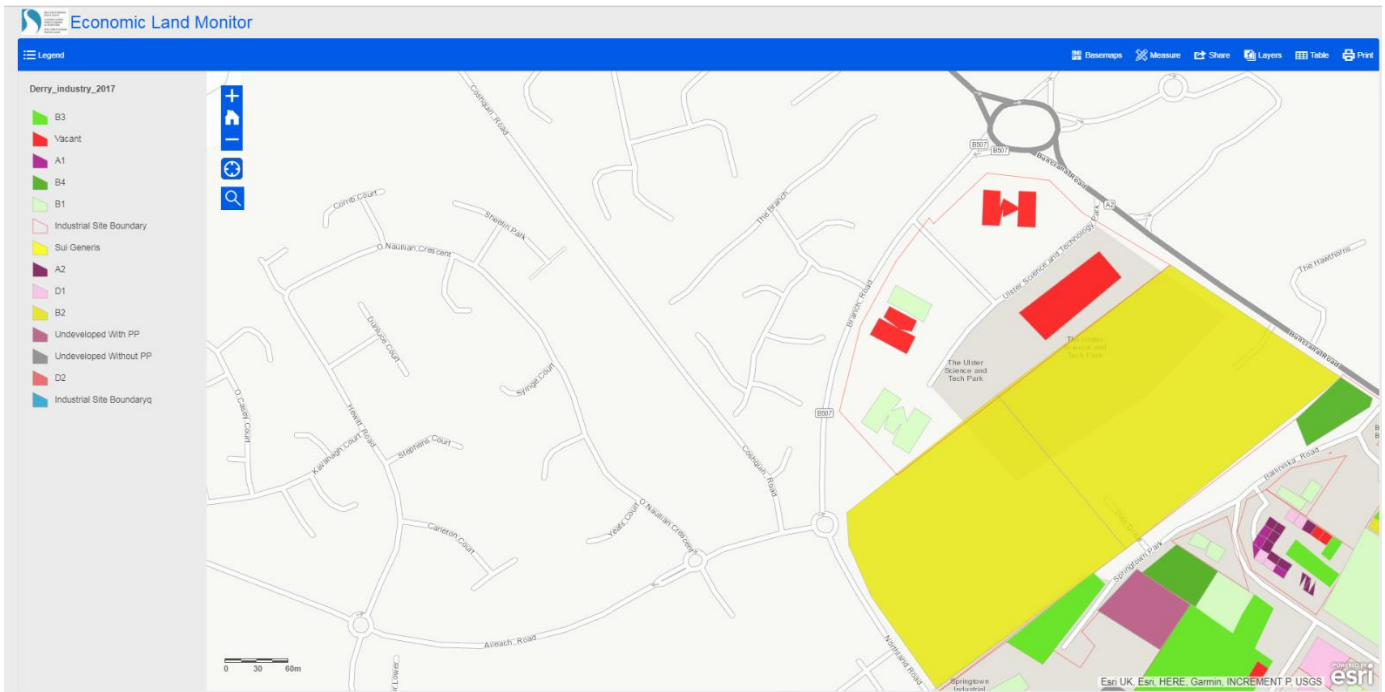


Figure 14 - Employment Land Seagate- there has been no change since this 2017 Map

3.20 Figure 14 above shows the existing employment land occupied by Seagate Technology. This is the second half of the site occupied by Seagate comprising 3.96 ha. The only use on the site is B2 light industry. The existing employment land is not designated by an industrial zoning and is considered to be fully developed, having no available vacant land for development, as also in the previous 2017 Monitor.

Springtown



Figure 15 – Employment Land Springtown Industrial Estate- there has been some minor changes since this 2017 map.

3.21 Figure 15 above shows the existing employment land situated at the Springtown Industrial Estate in 2017. There has been some change to the situation since this map, as outlined below. 36.3% of the site has been lost to other uses including indoor fitness centres, gyms, indoor children’s play areas and retail uses. This situation remains unchanged in 2021. Of the main employment uses B3 General Industry is predominant, accounting for 21% of the land use in 2021 (unchanged from 2017). 14% of the site comprises B1 Office use and B2 Light Industry. These have increased slightly since 2017 (B1 10.1% and B2, 3.8%). The remaining part of the developed site is vacant buildings 22%, a slight decrease of <1% since 2017. The amount of land considered available for development has also decreased slightly, from 15% to 9% in 2021.

Ulster Science & Technology Park

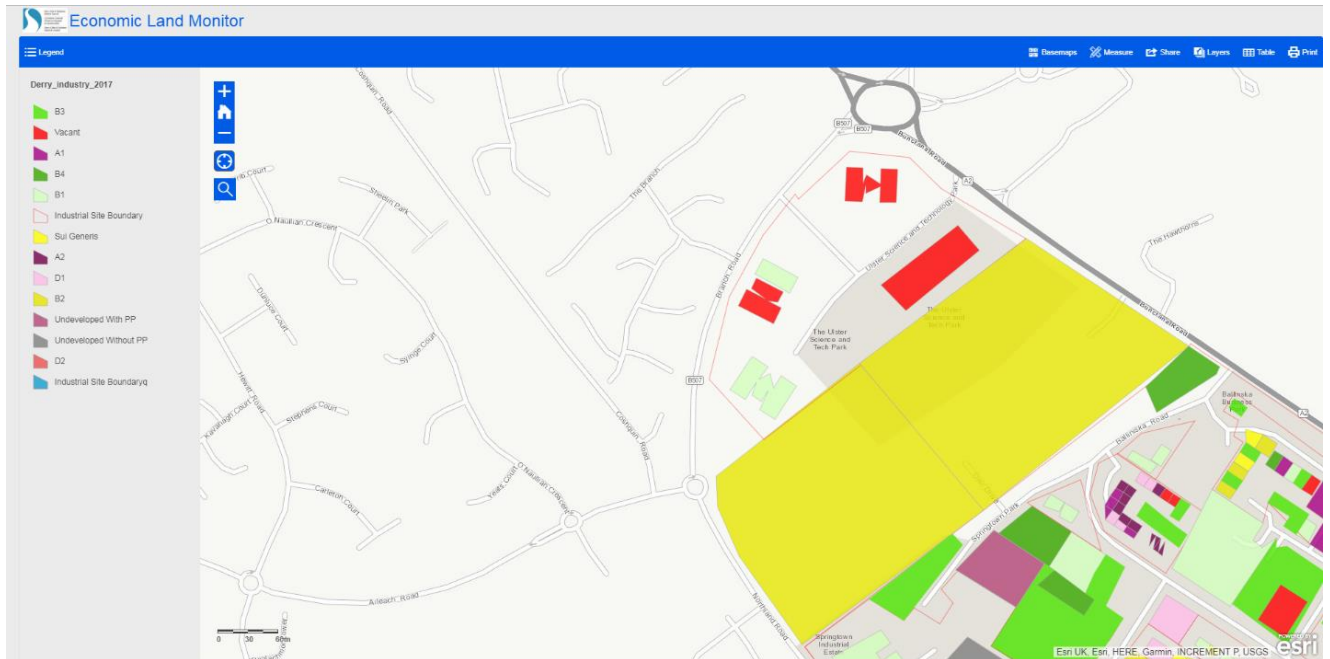


Figure 16 – Employment Land Ulster Science & Technology Park- there has been no change since this 2017 Map.

3.22 Figure 16 above shows the existing employment land at the Ulster Science and Technology Park. Although there have been changes in occupiers, there has been no change in terms of use classes from the 2017 Monitor. The site is predominately made up of vacant buildings (66%) The remaining third of the site comprises B1 Office use (34%) The existing employment land is not designated by an industrial zoning and is considered to be fully developed, having no available vacant land for development. This situation remains unchanged from 2017.

Fort George

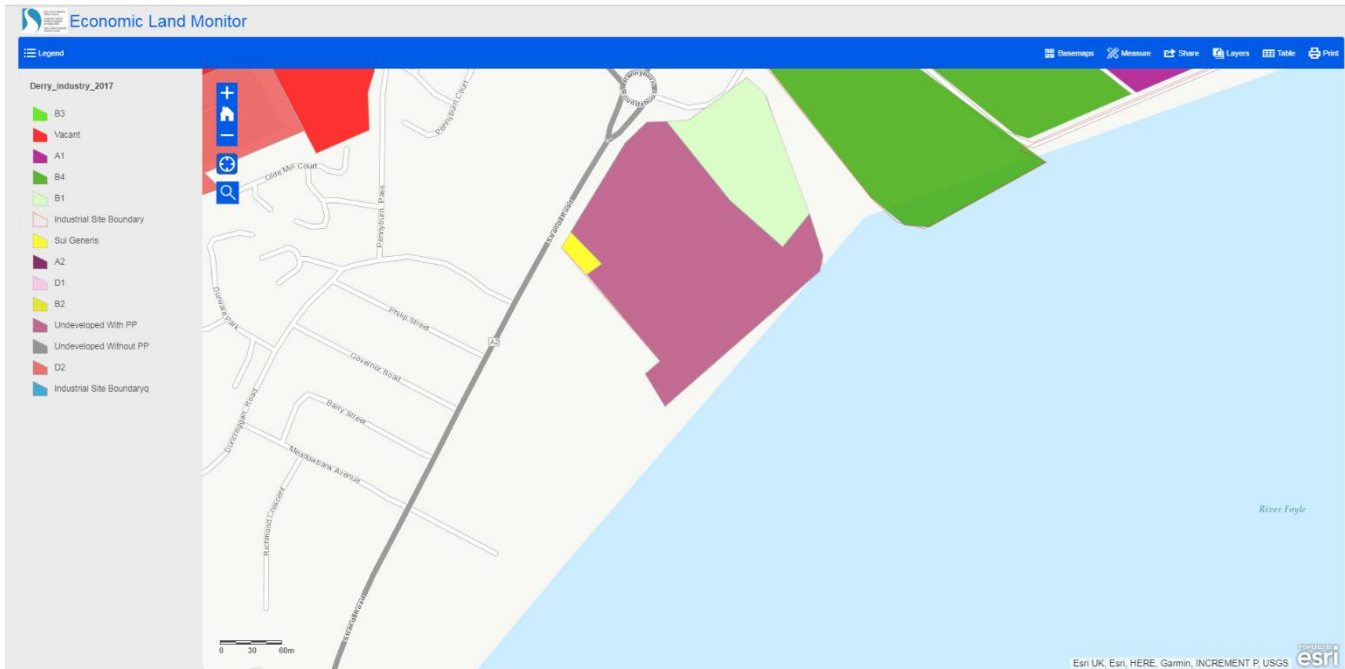


Figure 17 - Existing Employment Land Fort George, no changes to 2017 map.

3.23 Figure 17 above shows the existing employment land situated at Fort George which comprises 4.5ha. There has been no change from this 2017 map. The site is largely undeveloped, but the predominant employment use of the developed area is B1 Offices (94% of the developed area). The remaining 6% of the developed area has been lost to other (non-employment) uses. Two-thirds of the site is undeveloped land which is considered to be undeveloped vacant land with planning permission.

Altnagelvin

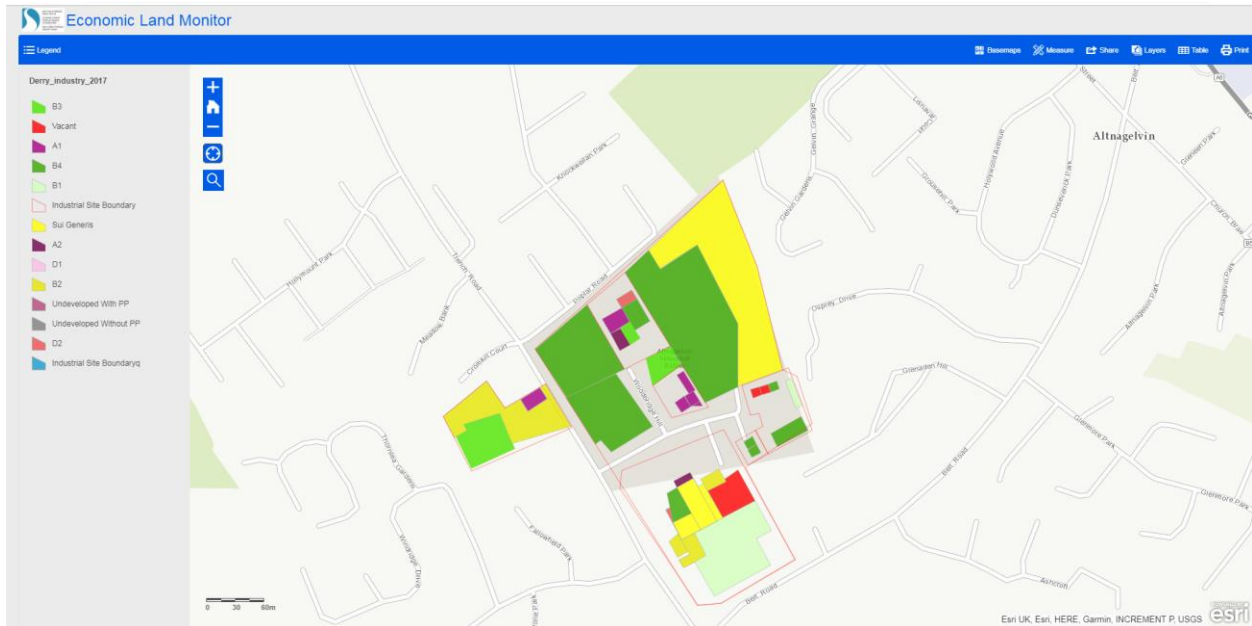


Figure 18 - Employment Land Altnagelvin- there have been some changes since this 2017 map.

3.24 Figure 18 above shows the employment uses at Altnagelvin in 2017. The site comprises 6.7ha. In both Monitors (2017 and 2021), 25.5% of the developed area had been lost to other uses, 14.8% was B3 and 2.2% B1 offices. There have been some changes to this map by 2021, as outlined below. In the 2017 monitor the predominant use of the developed site area was B4 Storage and Distribution which accounted for 47.8% of the developed area. This decreased to 23.5% by 2021. 34% of the developed area of the site is now made up of vacant buildings in 2021, compared with just 9% in 2017. The existing employment land is not designated by an industrial zoning and, is considered to be fully developed, having no available vacant land for development as in the previous Monitor in 2017.

Drumahoe

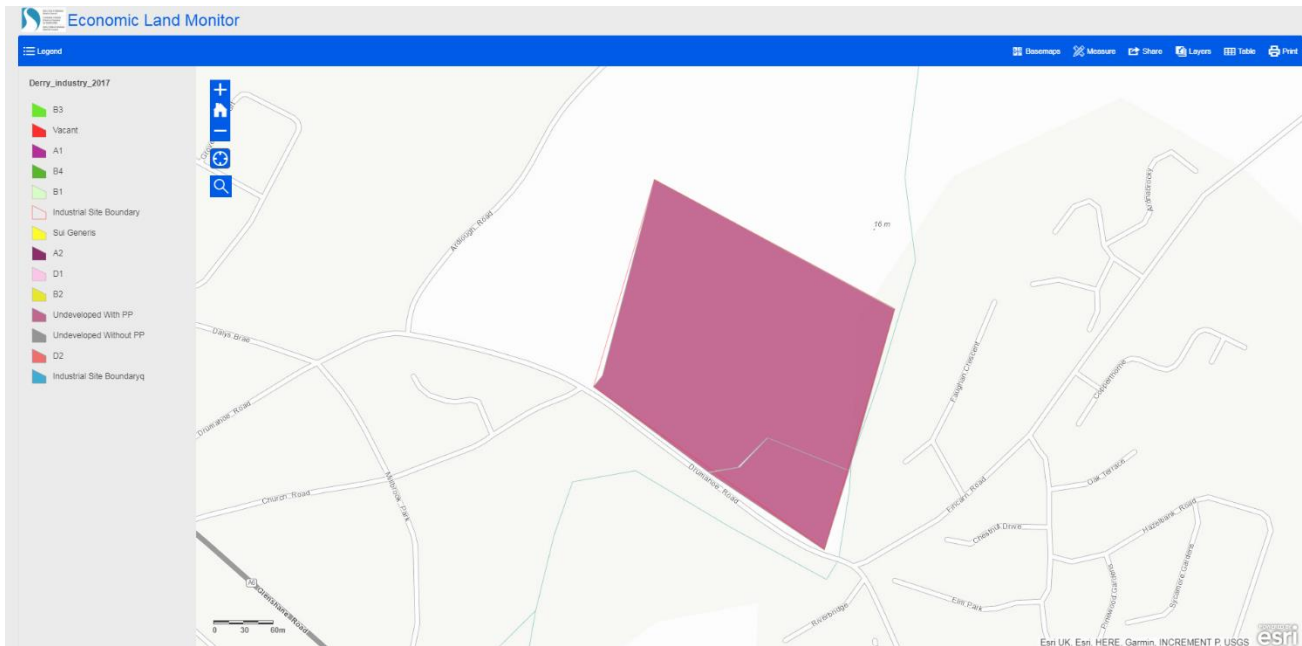


Figure 19 - Existing Employment Land at Drumahoe. There have been no changes since this 2017 map

3.25 Figure 19 above shows the existing employment land situated at Drumahoe. The site comprises 6.4ha. This map remains unchanged for the 2021 Monitor. The site is completely undeveloped, but has planning permission for non-economic development uses.

Glendermott Road



Figure 20 - Employment Land at Glendermott Road- there have been no changes since this map from 2017.

- 3.26 Figure 20 above shows the existing employment land situated along the Glendermott Road. There has been no changes map since this 2017 map. The site is largely developed and the predominant use is B3 General Industry (84% of the developed area). The remaining 16% is made up of B4 Storage and Distribution. The existing employment land is not designated by an industrial zoning and 75% of the site has been developed. The remaining 25% is vacant land available for development.

Glendermott Valley Business Park

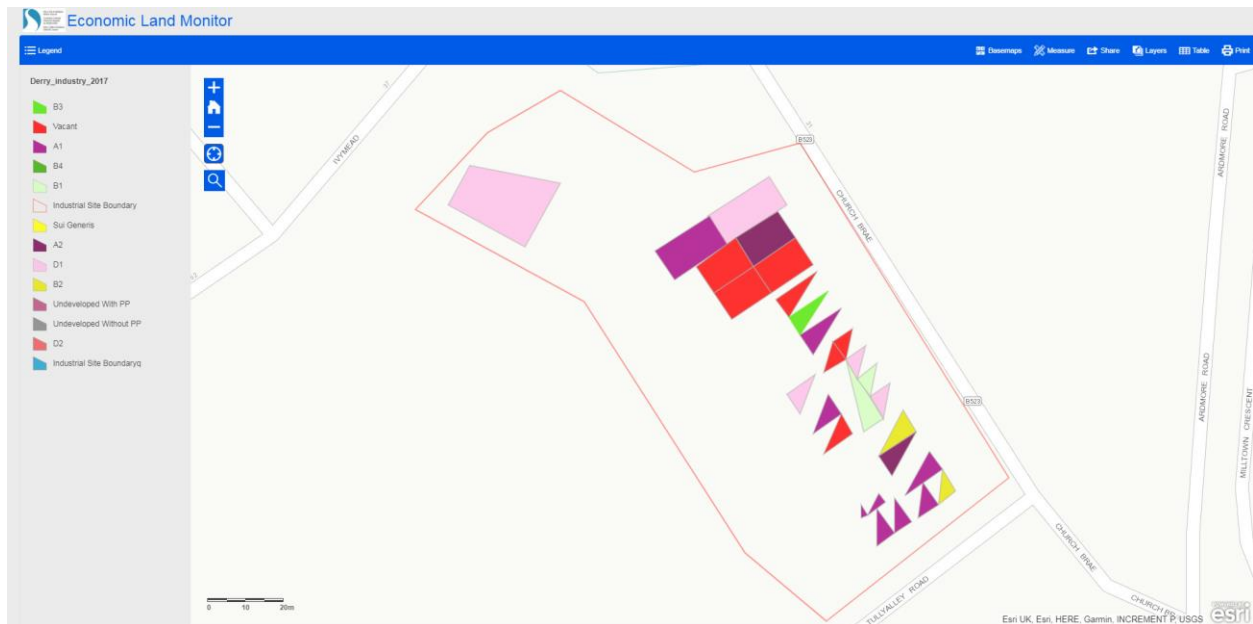


Figure 21 - Employment Land Glendermott Valley Business Park- there have been minor changes since this 2017 map.

3.27 Figure 21 above shows the existing employment land at Glendermott Valley Business Park in 2017. The site comprises 0.98ha. There have been minor changes since this 2017 map, as outlined below. Within the 2017 EDLM the predominant use of the site had been areas lost to other (non-employment) uses (60% of the developed part of the site). This remains the predominant use in 2021 but there has been a slight reduction to 56% of the developed part of the site. Vacant buildings accounted for 24% of the developed area in 2017, slightly increasing to 29% by 2021. 5.4% of the site was B2 in both Monitors. The remainder of the developed part of the site is made up with B1 Office use and B3 General Industry, having a slight increase from 2017 from 8.5% to 10% in 2021. The existing employment land is not designated by an industrial zoning and is considered to be fully developed, having no available vacant land for development. This remains unchanged in 2021.

Trench Road

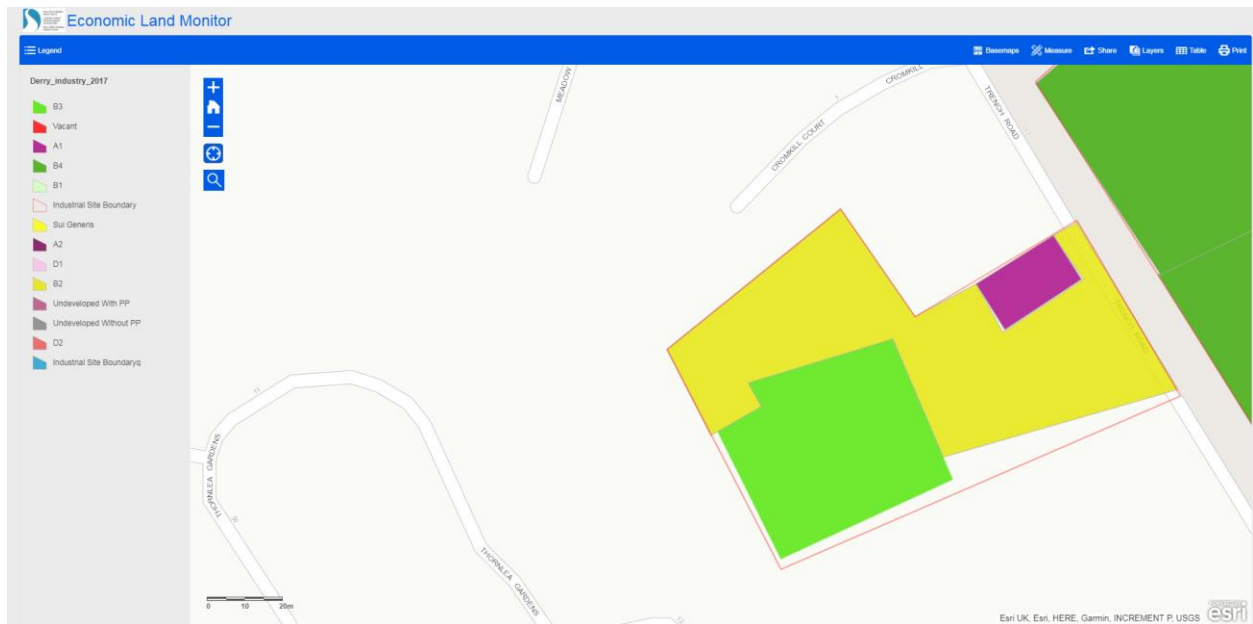


Figure 22 - Employment Land Trench Road- the situation is unchanged from this 2017 map.

3.28 Figure 22 above shows the existing employment land at Trench Road. The situation remains unchanged from this 2017 map. The predominant use of the site is a breakers yard/ vacant (65.1% of the site). B3 General Industry and Other Uses account for the remaining use of the land (34.9% of the site). The existing employment land is not designated by an industrial zoning and is considered to be fully developed, having no available vacant land for development. This situation remains unchanged since 2017.

Table 5: Derry Villages and Countryside Sites 2021 - Estimated Remaining Capacity (ha) on Existing Economic Development Land

3.29

| Location | Settlement | Approx. Site Area | Approx. Site Area (ha) Undeveloped | Approx. Site Area (ha) Vacant |
|-------------|-----------------------------------|-------------------|------------------------------------|-------------------------------|
| Village | Ardmore | 0.69 | 0 | 0 |
| Village | Chambers | 2.42 | 0 | 0 |
| Village | Claudy | 2.05 | 0 | 2.0 |
| Village | Eglinton – Rural | 3.78 | 0.9 | 0.2 |
| Village | Eglinton Village (Benbow Ind Est) | 5.11 | 0.9 | 0.1 |
| Village | Newbuildings Business Centre | 0.18 | 0 | 0 |
| Village | Newbuildings – Woodside Road | 2.92 | 0 | 0 |
| Countryside | Campsie | 89.81 | 25 | 5.9 |
| Countryside | Maydown | 274.12 | 92 | 9.076 |
| Countryside | Longfield | 13.23 | 0 | 0.5 |
| | Total | 394.31 | 118.8 | 17.8 |

Ardmore, Chambers & Claudy

3.30 The rural villages of Ardmore, Chambers and Claudy all are existing industrial land. The predominant industrial use across Ardmore (0.7ha) and Chambers (2.4ha) is B3 general industry which accounts for 100% of both sites. In Claudy (2ha) the site is largely vacant buildings approximately accounting for 74% and the remainder of the site is land lost to other (non-economic development) uses. All three villages are existing employment land which are not designated by an industrial zoning and are considered to be fully developed, having no available vacant land for development.

Eglinton – Rural



Figure 23 - Existing Employment Land Eglinton Rural- there has been no change since this 2017 map.

- 3.31 Figure 23 above shows the rural existing employment land just outside Eglinton. There has been no change since this 2017 map. The site comprises 3.8 ha. In both 2017 and 2021 the site is predominately vacant buildings (44% of the developed land). 49% of the developed area has been lost to other (non-employment) development including a large car dealership. The remaining area of the developed land is made up of B3 General Industry (7%). 24% of the site area is undeveloped without planning permission and available for development.

Eglinton – Village



Figure 24 - Rural Existing Employment Land Eglinton Village- some change since this 2017 Map

3.32 Figure 24 above shows the rural existing employment land within Eglinton village. The site comprises 5.1ha. There has been some change to this map from the 2017 situation. The predominant use is land lost to other uses covering approximately half of the developed area (50.9% in 2017 and 60% in 2021). Next is vacant buildings which accounts for 19% of the developed area, a slight decrease from 2017 (25%). The remainder of the site is made up of B1 Office use (2.1% both Monitors), B3 General Industry (16% both Monitors) and B4 Storage & Distribution (7% in 2017 and 3.5% in 2021). 29% of the site area is undeveloped without planning permission and available for development.

Newbuildings Business Centre

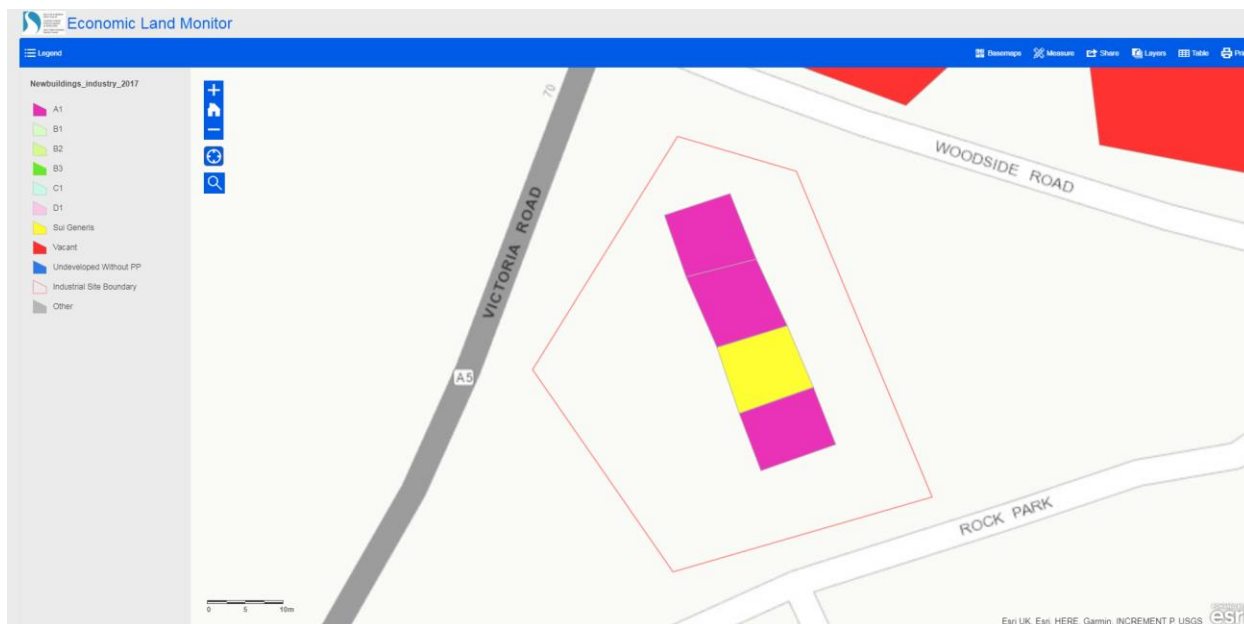


Figure 25 - Rural Employment Land Newbuildings Business Centre- the situation is unchanged since this 2017 map.

- 3.33 Figure 25 above shows the rural existing employment land situated at Newbuildings Business Centre. The situation remains unchanged since this 2017 map. The predominant and sole use within the business centre is land lost to other (non-employment uses), with all units currently occupied. The existing employment land is not designated by an industrial zoning and, is considered to be fully developed, having no available vacant land for development in 2021.

Newbuildings – Woodside Road

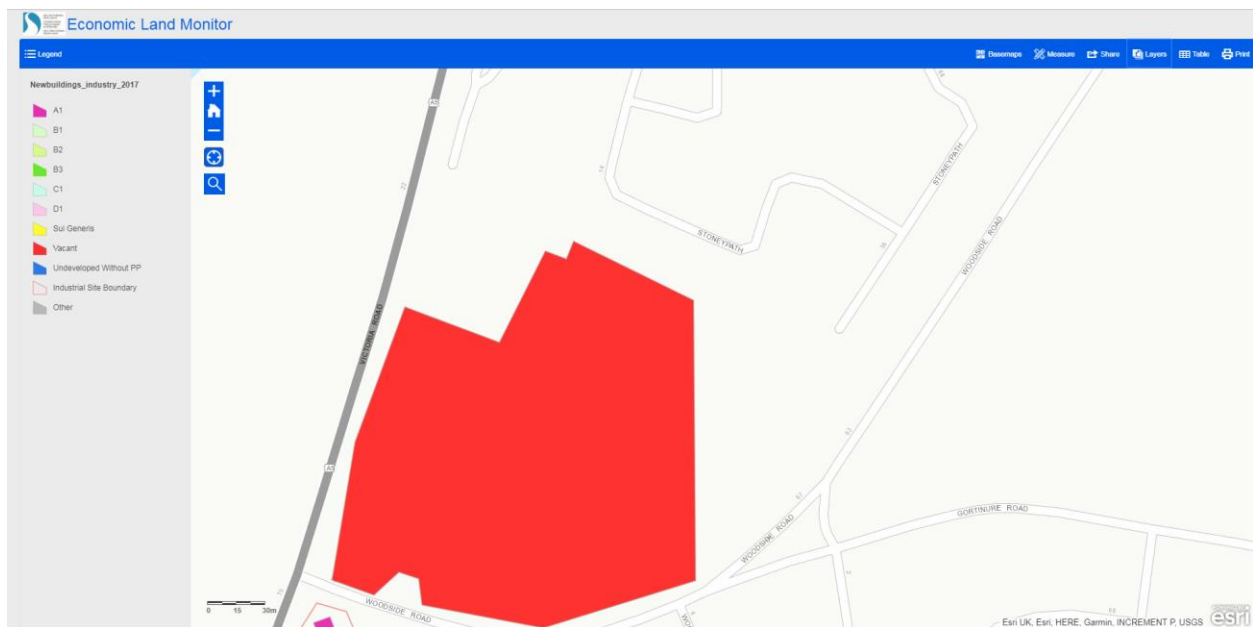


Figure 26 - Rural Employment Land Newbuildings Woodside Road- unchanged since 2017.

- 3.34 Figure 26 above shows the rural existing employment land at Newbuildings alongside the Woodside Road in 2017. This map remains unchanged in 2021. The site is solely made up of vacant buildings. The existing employment land is not designated by an industrial zoning and is considered to be fully developed, having no available vacant land for development. The land has planning permission for housing.

Campsie



Figure 27 - Rural Employment Land Campsie- Significant change since this 2017 Map.

3.35 Figure 27 above shows the rural existing employment land at Campsie Industrial Estate. There has been significant change to this 2017 map, as outlined below. The largest proportion of the developed area comprises B3 General Industry at 47% (a significant increase from the 2017 Monitor total of 10.3%). Vacant units account for 10% of the developed land, a significant drop from 45% in 2017. A quarter of the site has been lost to other (non-employment) uses, a slight reduction from 26% in 2017. The other main employment uses B1 Office, B2 Light Industry, & B4 Storage & Distribution combined account approximately for another 17% of the developed area, a slight decrease from the 2017 Monitor (18.5%). **28% of the site area (25ha) remains undeveloped without planning permission and is available for development (as in 2017).**

Maydown

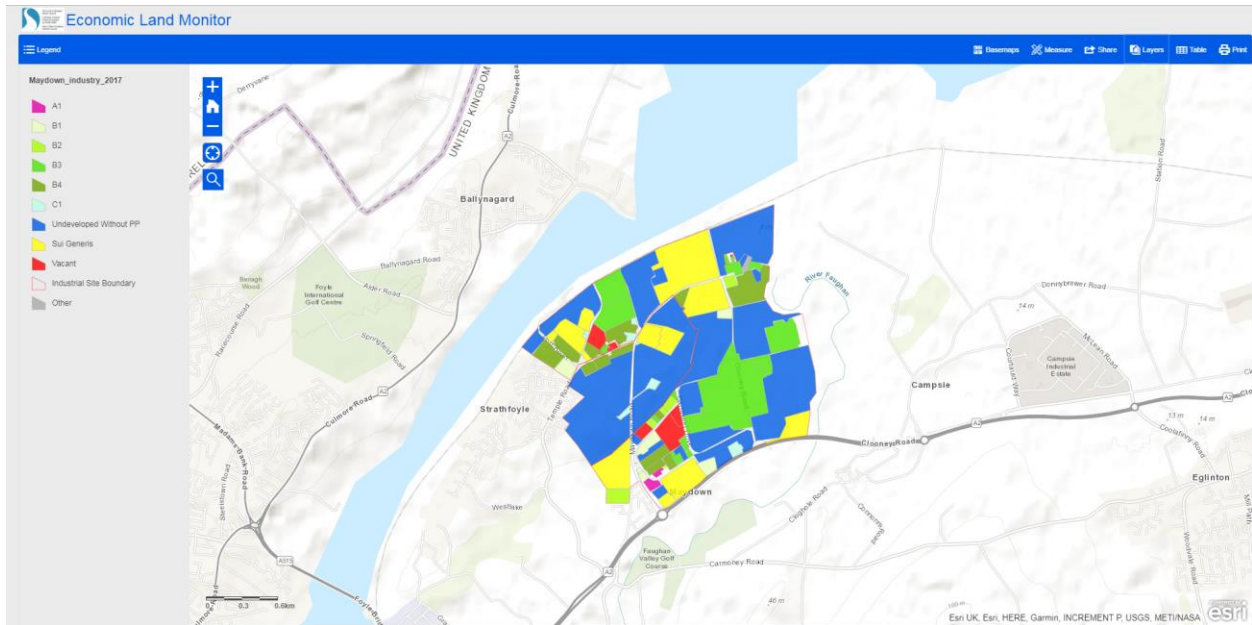


Figure 28 - Rural Employment Land Maydown.- there have been changes since this 2017 Map

3.36 Figure 28 above shows the rural existing employment land at Maydown. This refers to the top and bottom of the site, as the middle section is zoned as industrial land. It comprises 274ha. The predominant use at the site is B3 General Industry accounting for approximately 52% of the developed area in 2021 (40.5% in 2017). The other main industrial uses (B1 Office, B2 Light Industry and B4 Storage & Distribution) combined make up another 13.9% of the developed area (24.7% in 2017). 27.5% of the developed area (38% in 2017) comprises various other uses but these are quite a 'mixed bag'. Most could be considered sui generis 'employment uses'. There are a small number of trade counters/ retail units. 5% of units are vacant (down from 9% in 2017). **33.5% (92ha) of the site (46%/ 128ha in 2017) is considered to be vacant undeveloped land available for development.**

Longfield

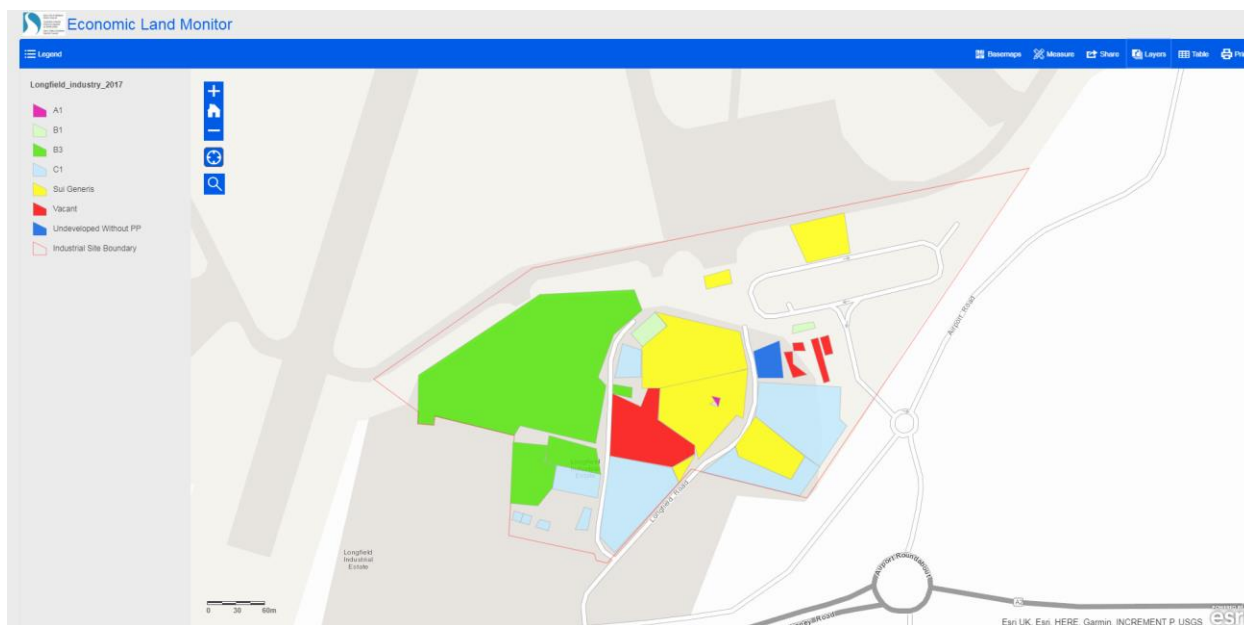


Figure 29 - Rural Employment Land Longfield- there has been no change since this 2017 Map

3.37 Figure 29 above shows the existing employment land at Longfield Industrial Estate. The site comprises 13.2 ha. Although there has been some change in terms of occupiers for the units, there has been no change since this 2017 map in terms of the mix and proportion of uses. The predominant use of the site is B3 General Industry which accounts for 43% of developed area (42% in 2017). Other miscellaneous/ sui generis uses make up 25% of the developed area mainly comprising employment generating uses including the airport terminal and associated uses but also a single pub, bookmakers and shop. the remainder of the developed area being made up of B1 offices (1%), vacant buildings (8%) and land lost to other development (23%). This site is fully occupied, with no vacant land with potential for development.

4.0 Strabane Town and Local Towns – 2021 Survey Findings

4.1 The Strabane Area Plan 2001 zoned land for ‘industrial’ purposes in Strabane town and in the local towns of Castledearg, Newtownstewart and Sion Mills. In contrast to Derry, of the 15 hectares zoned in Strabane town, less than 1 hectare remains undeveloped with only 0.5 hectares remaining at Dublin Road and 0.4 hectares at Orchard Road. Less than 5 hectares of zoned industrial land remains undeveloped in the local towns of Strabane. Most of the zonings in Castledearg and Newtownstewart have been taken up. In Sion Mills, industrial land was originally zoned to allow for possible expansion of the Mill, but this has now closed.

Table 6: Summary Findings of Zoned Lands - Surveys 2011, 2017 & 2021 – Estimated Remaining Capacity (ha)

| Settlement | Location | Area Zoned (Approx. ha) | Area Remaining Undeveloped (approx. ha) 2011 * | Area Remaining Undeveloped (approx. ha) 2017 | Area Remaining Undeveloped (approx. ha) 2021 |
|----------------|--------------------------------------|-------------------------|--|--|--|
| Strabane Town | SE 29.6.1 Dublin Road | 4.9 | 1.3 | 0.48 | 0.47 |
| Strabane Town | SE 29.6.2 Orchard Rd | 10.5 | 2.6 | 0.39 | 0.39 |
| | Strabane Town Total | 15.4 | 3.9 | 0.87 | 0.86 |
| Castledearg | CG 57.2 Castlegore Rd | 2.8 | 1.6 | 1.6 | 1.4 |
| Newtownstewart | NT 77.2 Baronscourt Rd | 2.1 | 0.4 | 0 | 0 |
| Sion Mills | SS 68.2 South of the Mill complex | 3.1 | 3.0 | 3.0 | 3.0 |
| | Strabane Local Towns Total | 8.0 | 5.0 | 4.6 | 4.4 |
| | TOTAL | 23.4 | 8.9 | 5.47 | 5.26 |

*Source: DOE Industrial Site Survey 2011

4.2 In Strabane, Invest NI’s main landholding was at Orchard Road where some 9 ha of their original holding have been sold to client companies, the local enterprise agency and Roads Service. Of the remaining 1.6 hectares, only 0.39 hectares

are undeveloped. In March 2013, Invest NI announced the completion of the first phase of the new business park at Melmount Road in Strabane, with a total of 9 ha of serviced land for potential investors. Whilst a number of Invest NI firms have declared an interest in acquiring sites, the business park remains empty, with no companies present on site.

Strabane Town – Dublin Road

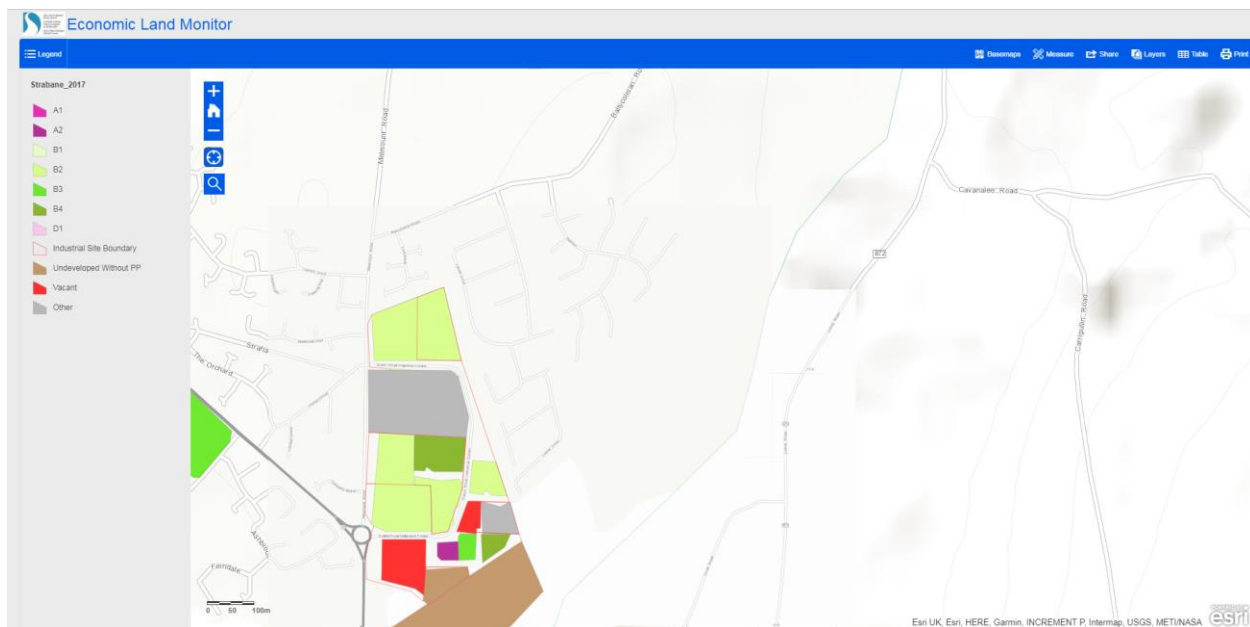


Figure 30 - Strabane Zoned Industrial Land Dublin Road- there have been some changes since this 2017 Map

- 4.3 Figure 30 above shows the zoned industrial land at Dublin Road Industrial Estate. There have been some changes since this 2017 map, as outlined below, this zoning only refers to part of the site, the zoned section of the site accounts to 4.38 ha of the overall 12.61 ha site. There are a number of key business such as O’Neills and McColgans. Whilst the majority of the developed area has been retained as employment uses (3% B1, 55% B2 and B4 19%), 17% of the site has various A2 Financial, Professional and Other Services in the form of gyms and dog groomers. 3% of the site is vacant buildings. **11% of the area was vacant and available for development in 2017 and this has now fallen to 4%.** A portion of the undeveloped land will be used to provide a storage and distribution site and lorry parking. Undeveloped land currently has a planning application for the extension of the O’Neills distribution facility to the south of the site (application reference LA11/2021/0932/F).

Strabane Town – Orchard Road

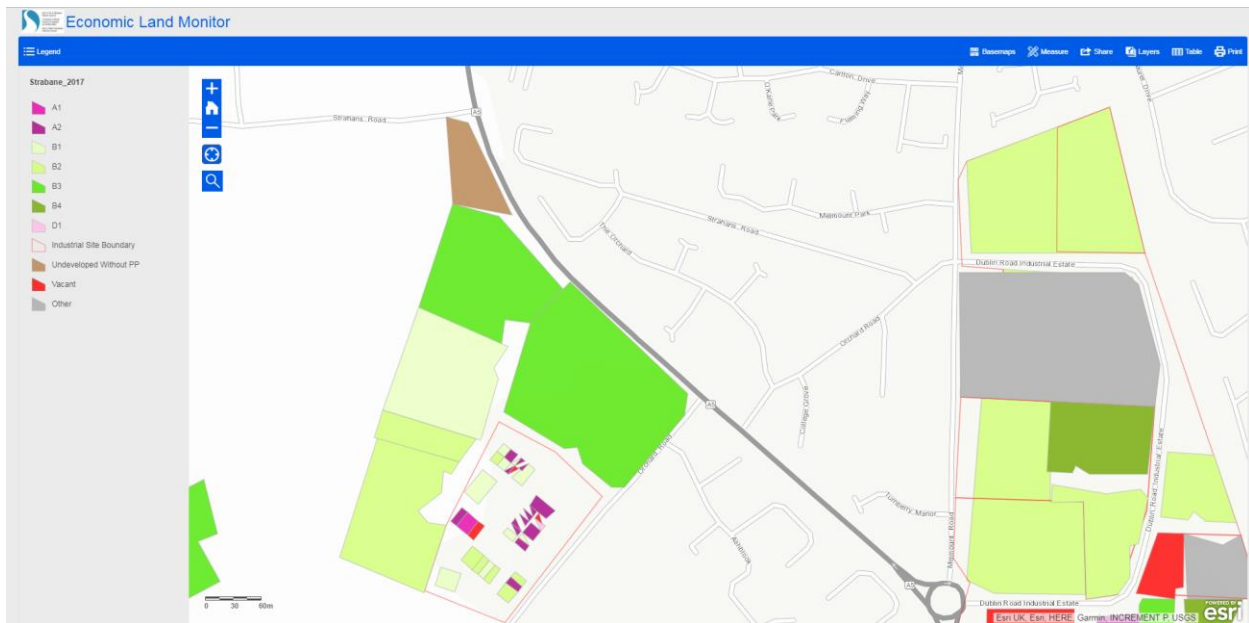


Figure 31 - Strabane Zoned Industrial Land Orchard Road- there has been some change since this 2017 map.

- 4.4 Figure 31 above shows the zoned industrial land at Orchard Road Industrial Estate. The zoning refers to the whole site shown above and comprises 10.5 ha. There have been some changes since this 2017 map was produced, as outlined below. Businesses such as Fabplus, Allstate and Frylight are located here. B3 general industry is the main use of the site covering 43% of the developed area (60% in 2017). B2 light industry covers 19% of the site (20% in 2017), B1 office use makes up 27% (15% in 2017). B4 comprises 2%, other uses 8% and vacant buildings 1% (both Monitors). Other uses include 2 shops, 2 'beauty' businesses and a dog parlour. **The developed area of the zoned industrial area accounts for approximately of 96% of the site**, the remaining the 4% is considered to be vacant undeveloped land without planning permission which is available for development.
- 4.5 The Estate is also home to the **Strabane Enterprise Agency which has 46 units with 45 of those being occupied**, the site has gone through three phases of development and is near capacity. The site is largely made up of Industrial and Business Uses. There is a small percentage of Shopping and Financial and Professional Services within the zoning. One portion of the site remains undeveloped and accesses onto Strahans Road.

| Orchard Road Industrial Estate (Zoned) | Gross Area (hectares) | % |
|---|--------------------------|-------------|
| B1 Offices | 2.30 | 26% |
| B2 Light Industry | 1.62 | 18% |
| B3 General Industry | 3.65 | 42% |
| B4 Storage and Distribution | 0.18 | 2% |
| A1 Shops | 0.32 | 4% |
| A2 Financial, Professional and Other Services | 0.14 | 2% |
| Sui Generis | 0.09 | 1% |
| Vacant | 0.05 | 1% |
| Undeveloped | 0.39 | 4% |
| Total area identified | 8.74 | 100% |

4.6 There are no planning permissions currently on the site or within the remainder of the zoning for further Economic Development.

Castleberg



Figure 32 – Castleberg Zoned Industrial Land Castlegore Road- there has been no change since this 2017 map

- 4.7 Figure 32 above shows the zoned industrial land situated in Castleberg, a local town as designated in the Strabane Area Plan 2001. Land was zoned for industry in the Strabane Area Plan 2001 along the Castlegore Road as carried forward from the West Tyrone Area Plan. There has been no change since this 2017 map, but additional sites (not surveyed in 2017) have been identified and added.

There were a number of sites surveyed totaling 5.56 ha including a mixture of miscellaneous/ sui generis uses. There are two daycare facilities, two shops, two gyms, 2 service units, one 'beauty' business, a dog parlour and a religious building. The first location surveyed was along the Castlegore Road which has one mixed site (total site area 1.26ha.) which is zoned, and one undeveloped zoned site (total site area 1.4ha.). There are also three surrounding sites along the Castlegore Road which are not zoned that had not previously been surveyed in the 2017 Economic Development Land Monitor, which have been added.

| Castleberg (Castlegore Road Zoned) | Gross Area (hectares) | % |
|---|-----------------------|-------------|
| B1 Offices | 0.23 | 9% |
| B2 Light Industry | 0.46 | 17% |
| A1 Shops | 0.14 | 5% |
| A2 Financial, Professional and Other Services | 0.08 | 3% |
| D1 Community and Cultural Uses | 0.26 | 10% |
| Sui Generis | 0.03 | 1% |
| Vacant | 0.06 | 2% |
| Undeveloped | 1.4 | 53% |
| Total area identified | 2.66 | 100% |

| Castleberg (Castlegore Road Unzoned) | Gross Area (hectares) | % |
|--------------------------------------|-----------------------|-------------|
| B4 Storage and Distribution | 0.4 | 45% |
| Sui Generis | 0.5 | 55% |
| Total area identified | 0.9 | 100% |

4.8 The second location in Castleberg which has been surveyed is the former St Eugene's High School Site which has been redeveloped into the 'Gateway Enterprise Complex' since the school closed in 2013. The site was surveyed and has a mixture of uses have subdivided the former school building to provide various opportunities for local businesses.

| Castleberg (Former St Eugenes High School Unzoned) | Gross Area (hectares) | % |
|--|-----------------------|-------------|
| B1 Offices | 0.50 | 25% |
| A1 Shops | 0.50 | 25% |
| A2 Financial, Professional and Other Services | 0.25 | 12.5% |
| D1 Community and Cultural Uses | 0.50 | 25% |
| Vacant | 0.25 | 12.5% |
| Total area identified | 2.0 | 100% |

4.9 There is no planning or development activity currently on the site or within the remainder of the settlement for further economic development.

Newtownstewart

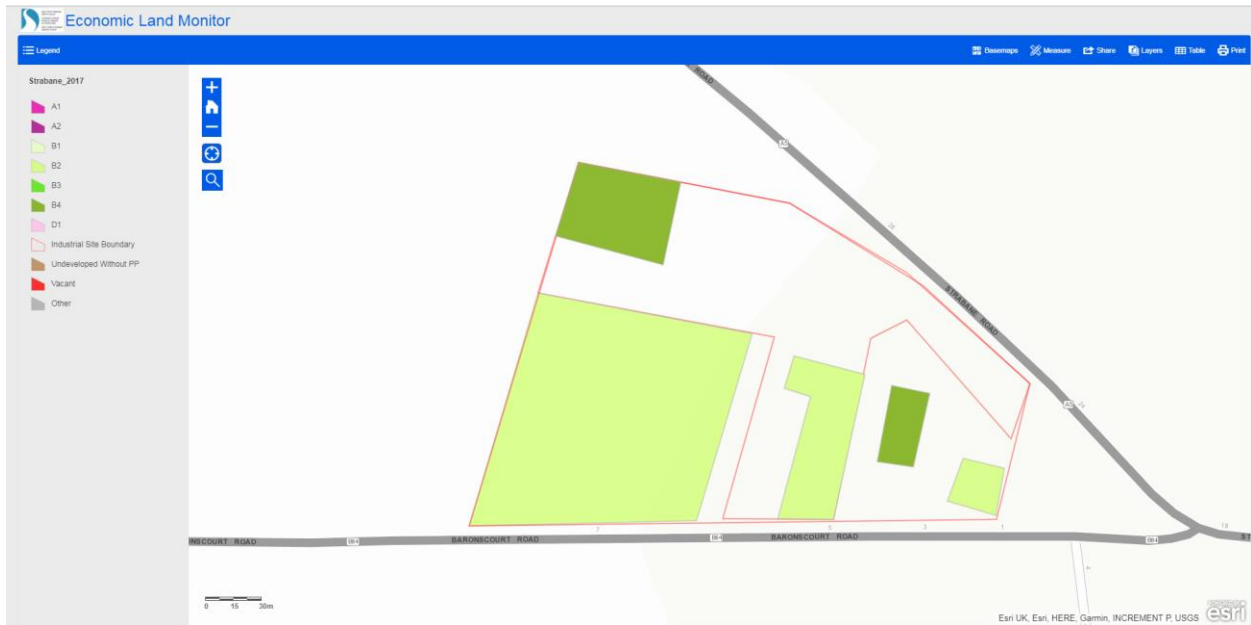


Figure 33 – Newtownstewart Zoned Industrial Land – summary of 2017 situation (part of site)

4.10 Figure 33 above shows the zoned industrial land situated in Newtownstewart. Below is a summary of the situation in 2021, there are no existing figures from the 2017 Monitor. This zoning refers to the whole site. The predominant use of the site developed area is B2 light industry 54% followed by B4 storage and distribution 43% while miscellaneous ‘other uses’ make up 3%. The zoned land is considered to be fully developed, having no available vacant land for development.

4.11 Two other locations within the settlement limits were surveyed, along Dublin Street and at Castle Brae / Douglas Road, these sites consisted of B2 Light Industry and Sui Generis uses (wholesalers, livestock sales) and were not included in the 2017 Monitor.

| Newtownstewart (unzoned) | Gross Area (hectares) | % |
|------------------------------|-----------------------|-------------|
| B2 Light Industry | 0.3 | 23% |
| Sui Generis | 1.0 | 77% |
| Total area identified | 1.3 | 100% |

4.12 There is no planning or development activity currently on the site or within the remainder of the settlement for further Economic Development.

Sion Mills

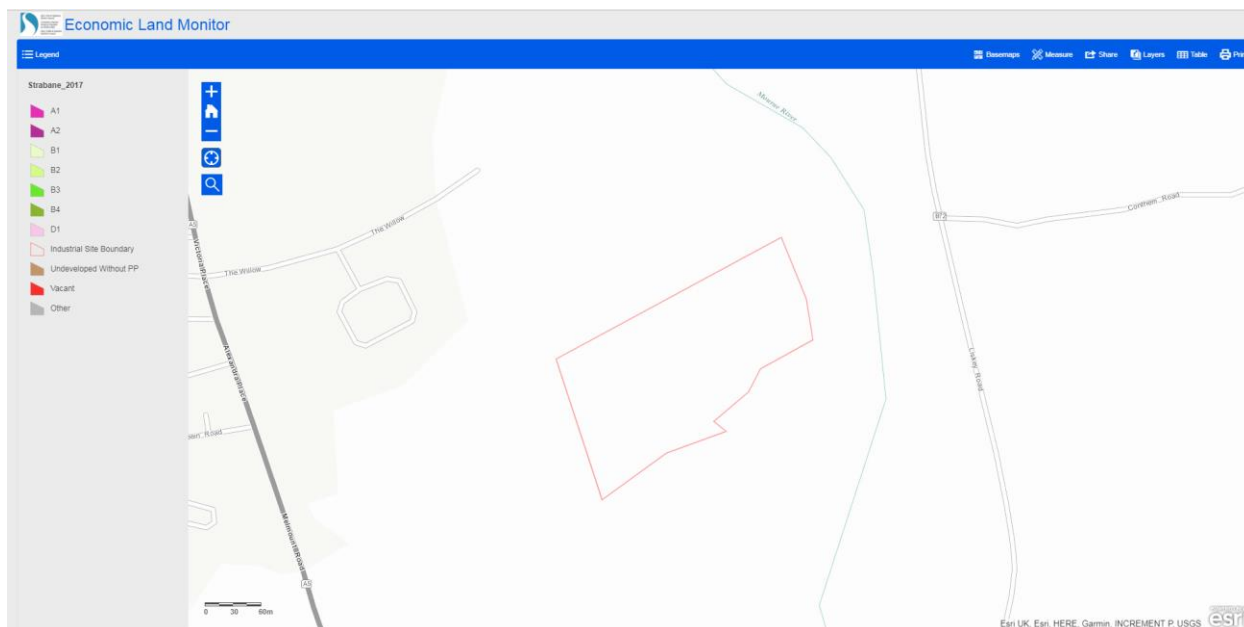


Figure 34 - Sion Mills Zoned Industrial Land- there has been no change since this 2017 Map

- 4.13 Figure 34 shows the zoned industrial land at Sion Mills. This zoning refers to the whole site comprising 3.1 ha. Land was zoned for Industry in the Strabane Area Plan 2001 to meet the expansion needs of existing industry within Sion Mills. There has been no change since this 2017 map. The site is currently vacant. It was zoned to provide for expansion of the mill complex but this has now closed. This site is close to the river and has significance in terms of the Conservation Area.
- 4.14 There is no planning or development activity currently on the site or within the remainder of the settlement for further economic development.

Other (Unzoned) Employment Land in Strabane 2021 - Estimated Remaining Capacity

4.15 **2017 Commentary, see 2021 update below:** There are two established 'industrial estates' in Strabane Town at Ballycolman and Dublin Road. In terms of recent proposals, an application is currently pending consideration to expand O'Neill's Sportswear using a stand-alone unit to the southern end of the Dublin Road Industrial Estate away from the main O'Neills complex. Despite opening in 2013, uptake of land at the Invest Northern Ireland (INI) Business Park has been very slow. Only recently has an announcement been made that its first tenant, Dragon Foods, intends to open a food manufacturing plant in the near future (LA11/2016/0755/F). There has been no significant change at Ballycolman and it is noted that permission was recently granted under LA11/2016/0158/F for a change of use from an industrial unit to childcare facility.

Table 7: Estimated Remaining Capacity (ha) on Other Unzoned Economic Development Sites

| Settlement | Location | Area Site Area (Approx. ha) | Area Remaining Undeveloped (approx. ha) | Area Remaining Undeveloped (approx. ha) | Area Remaining Undeveloped (approx. ha) |
|----------------------|-------------------------------|-----------------------------|---|---|---|
| | | | 2011 * | 2017 | 2021 |
| Strabane Town | Ballycolman Industrial Estate | 3.9 | 0 | 0 | 0 |
| Strabane Town | Dublin Road Industrial Estate | 6.2 | 0 | 0 | 0 |
| Strabane Town | Strabane Business Park | 8.9 | 8.9 | 8.9 | 6.8 |
| | Total | 19.0 | 8.9 | 8.9 | 6.8 |

Ballycolman Industrial Estate

4.16 The existing employment land at the Ballycolman Industrial Estate is not designated by any zoning. It comprises 3.9 ha. A large proportion of this site was formerly taken up by the Adria Factory which has now been demolished. The

predominant use of the developed area is B3 General Industry (30% of the developed area). The remaining area consists largely of vacant buildings as well as minor other uses. The site is considered to be fully developed in terms of buildings, having no available vacant land for development.

- 4.17 The rest of Ballycolman Industrial Estate is largely made up of Industrial and Business Uses; however, there are a number of other uses which are located in the business park including shopping and financial and professional services.

| Ballycolman Industrial Estate (unzoned) | Gross Area (hectares) | % |
|---|-----------------------|-------------------|
| B1 Offices | 0.07 | 2% |
| B2 Light Industry | 0.25 | 8% |
| B3 General Industry | 2.26 | 74% |
| A1 Shops | 0.02 | 1% |
| A2 Financial, Professional and Other Services | 0.11 | 2% |
| D1 Community and Cultural Uses | 0.06 | 2% |
| Sui Generis | 0.02 | 1% |
| Vacant buildings | 0.23 | 8% |
| Developed area | 3.02 | 40% / 100% |
| Undeveloped | 4.55 | 60% |
| Total area identified | 7.57 | N/a |

- 4.18 The large proportion of the undeveloped land is the former Adria Factory. This area has planning approval for a residential-led mixed use development comprising 158 residential units in a mix of dwellings and apartments of mixed tenure, two retail units (class A1, office space (class b1), multi-functional space and ancillary accommodation with public and private amenity space, parking and landscaping (LA11/2019/0880/F).
- 4.19 Since the 2017 survey, Mopack has extended its existing warehouse building making it larger than previously surveyed, increasing its workforce and level of machinery and equipment on site.

Dublin Road Industrial Estate

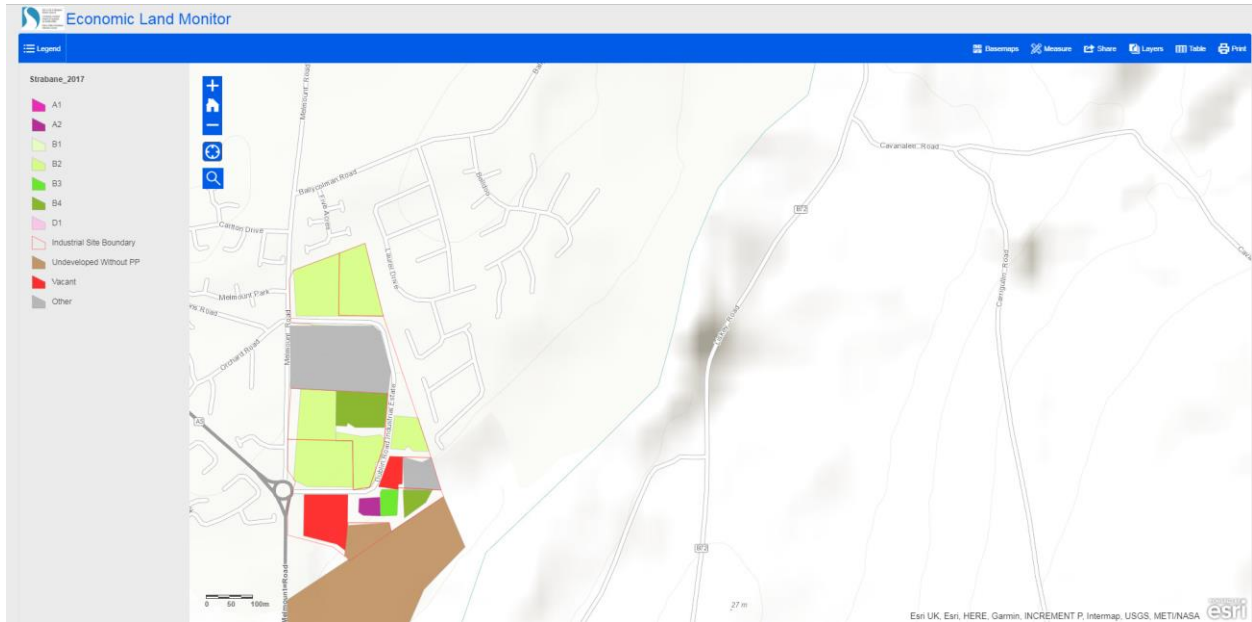


Figure 35 - Existing Employment Land Dublin Road Industrial Estate- summary of situation in 2017.

4.20 Figure 35 above shows the employment land at Dublin Road Industrial Estate. Below is a summary of the situation in 2021 since this map was produced in 2017. There are no existing figures for 2017. This existing industrial site refers to the remaining 8.23 ha of the site that is not zoned. The predominant use of this land is B2 light industry (47% of the site). This is accompanied with various/ miscellaneous other uses which make up 35% of the site. Vacant buildings account for 12% and the remaining, 6% consists of B3 general industry and B4 storage & distribution. The site is considered to be fully developed with no available vacant undeveloped land.

Strabane Business Park

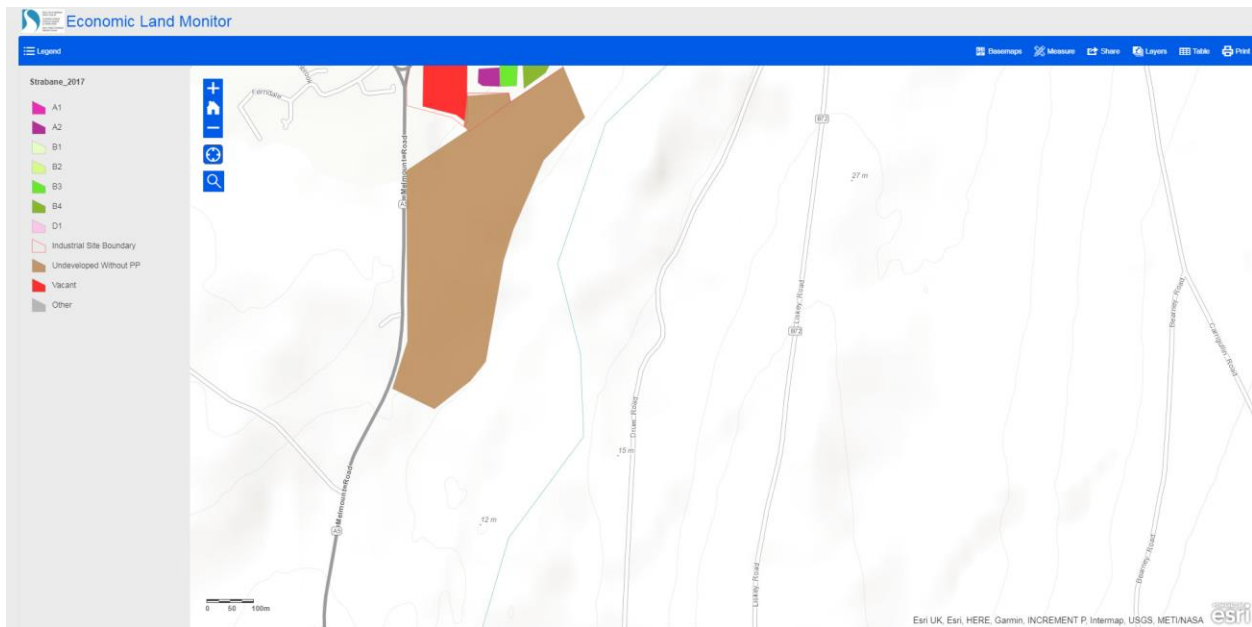


Figure 36 - Existing Employment Land Strabane Business Park- Summary of situation in 2017.

4.21 Figure 36 above shows the existing employment land at Strabane Business Park, which is situated outside of the development limit previously identified in the Strabane Area Plan 2001. The site however has been developed and promoted by Invest Northern Ireland to encourage investment in Strabane town and employment in the wider Derry City and Strabane District. To date, there have been two developments which have taken place. Firstly, in 2017 Dragon Brand Foods invested into the Strabane Business Park to develop their factory with the support of Invest NI. Secondly, KES group have built a state-of-the-art manufacturing facility to accommodate their first phase of development seeking to bring their ‘SmartBuild’ and ‘Energi’ divisions under one roof. Below is a summary of the situation in 2021, there are no figures from the 2017 Monitor.

| Strabane Business Park – Invest NI Site (Unzoned) | Gross Area (hectares) | % |
|---|-----------------------|------|
| B2 Light Industry | 0.64 | 6% |
| B3 General Industry | 1.48 | 14% |
| Undeveloped | 8.38 | 80% |
| Total area identified | 10.5 | 100% |

4.22 **There is large proportion of the site still available / undeveloped**, though recently there has been an increase in interest at the site with two planning applications lodged seeking to double the current capacity at the site, these include:

- Houston Precision Engineering have submitted a Planning Application for Erection of industrial unit for fabricated metal production Class B2 light industrial. (LA11/2021/0956/F). A proposed £2 million investment from the Donegal based manufacturing firm will take up three acres of land at Strabane Business Park.
- KES Group have also submitted a Planning Application for the Erection of production unit with administrative spaces and car parking with existing key factory. KES Group extension (LA11/2022/0008/F). This will increase KES groups presence on the site and lead to additional investment in the Strabane Area.

Knockroe Business Park

4.23 Situated to the south of the Orchard Road Industrial Estate this site was not zoned in the Strabane Area Plan 2001. Whilst suitable for Industrial and Business Uses this site has been mainly occupied by Shopping and Financial and Professional Services and Sui Generis uses such as car sales. There are two large vacant units at the site. Below is a summary of the situation in 2021, there are no figures from the 2017 Monitor.

| Knockroe Business Park (unzoned) | Gross Area (hectares) | % |
|---|-----------------------|-------------|
| A1 Shops | 0.16 | 12% |
| A2 Financial, Professional and other services | 0.16 | 12% |
| Sui Generis | 0.73 | 53% |
| Vacant | 0.32 | 23% |
| Total area identified | 1.37 | 100% |

4.24 There is no planning permission currently on the site or within the remainder of the site for further economic development.

Strabane Small Settlements and Villages

4.25 Additional sites currently used for existing industry/economic development have been identified within the villages Artigarvan, Aughabrack, Donemana, Plumbridge and Victoria Bridge were also monitored. These were not monitored in either 2011 or 2017 Monitor but have been included in 2021 EDLM.

Artigarvan

4.26 Artigarvan is a small settlement designated in the Strabane Area Plan 2001. No land was zoned for economic development in the Strabane Area Plan 2001 within the Artigarvin Village. There were four sites surveyed, totaling 6.7ha. with a mix of B3 General Industrial, B4 Storage and Distribution and mixed business uses along the Art Road and Berryhill Road. The sites surveyed are located on the southern edge of the development limit with some residential pockets of development adjoining.

| Artigarvan (Unzoned) | Gross Area (hectares) | % |
|------------------------------|--------------------------|-------------|
| B3 General Industry | 3.8 | 57% |
| B4 Storage & Distribution | 2.2 | 33% |
| Mixed Business Uses | 0.7 | 10% |
| Total area identified | 6.7 | 100% |

4.27 There is no planning permission currently on the site or within the remainder of the settlement for further economic development.

Aughabrack

4.28 Aughabrack is a small settlement designated in the Strabane Area Plan 2001. No land was zoned for economic development in the Strabane Area Plan 2001 within the Aughabrack small settlement. There were two sites surveyed, totaling 0.2ha. with a mix of B2 Light Industry and mixed business uses along the Lisnaragh Road.

| Aughabrack (Unzoned) | Gross Area (hectares) | % |
|------------------------------|--------------------------|-------------|
| B2 Light Industry | 0.1 | 50% |
| Sui Generis | 0.1 | 50% |
| Total area identified | 0.2 | 100% |

4.29 There is no planning permission currently on the site or within the remainder of the settlement for further economic development

Donemana

4.30 Donemana is a Village designated in the Strabane Area Plan 2001. No land was zoned for economic development in the Strabane Area Plan 2001 within the Village of Donemana. There were a number of sites surveyed in Donemana Enterprise Park, totaling 0.7ha. with a mix of B2 light Industrial, Sui Generis and one vacant unit. The site surveyed is in close proximity to the village centre.

| Donemana (Unzoned) | Gross Area (hectares) | % |
|------------------------------|--------------------------|-------------|
| B2 Light Industry | 0.4 | 58% |
| Sui Generis | 0.2 | 28% |
| Vacant | 0.1 | 14% |
| Total area identified | 0.7 | 100% |

4.31 There is no planning permission currently on the site or within the remainder of the settlement for further economic development.

Plumbridge

4.32 Plumbridge is a Village designated in the Strabane Area Plan 2001. No land was zoned for economic development in the Strabane Area Plan 2001 within the Village of Plumbridge. There were two sites surveyed, totaling 0.8ha. with a mix of B3 General Industrial and Other uses along the Glenelly Road. The sites surveyed are located within close proximity to the village centre and are adjacent to the river and flood plain.

| Plumbridge (Unzoned) | Gross Area (hectares) | % |
|------------------------------|--------------------------|-------------|
| B3 General Industry | 0.4 | 50% |
| Other Uses | 0.4 | 50% |
| Total area identified | 0.8 | 100% |
| | | |

4.33 There is no planning permission currently on the site or within the remainder of the settlement for further economic development.

Victoria Bridge

4.34 Victoria Bridge is a Village as designated in the Strabane Area Plan 2001. No land was zoned for economic development in the Strabane Area Plan 2001 within the Victoria Bridge Village. There were four sites surveyed, totaling 2.5ha. with a mix of B2 Light Industry and mixed/ sui generis business uses along the Melmount Road and Fyfin Road including a truck dealer, animal feeds business including shop and a car dealership.

| Victoria Bridge (Un-zoned) | Gross Area (hectares) | % |
|------------------------------|--------------------------|-------------|
| B2 light Industry | 0.2 | 8% |
| Sui Generis | 2.3 | 92% |
| Total area identified | 2.5 | 100% |

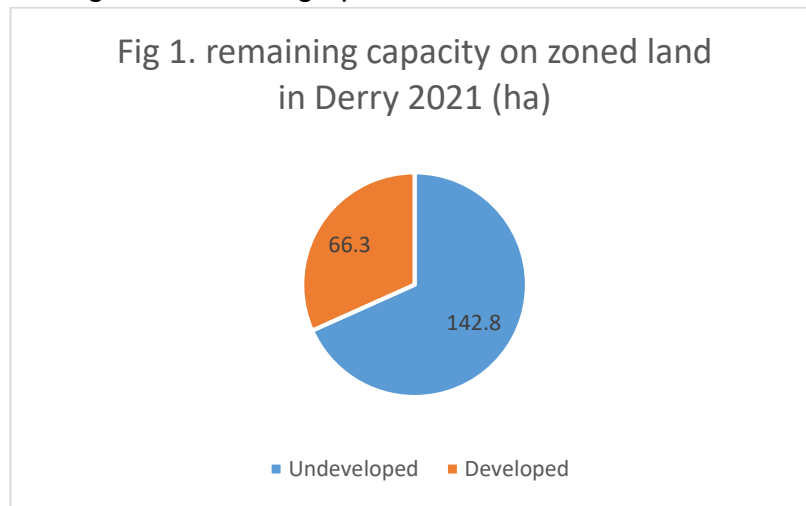
4.35 At the time of surveying there were no live planning applications within the survey area at Victoria Bridge. At a site to the south of St Eugene's Primary School, there was an application under consideration for a proposed storage unit (Use Class B4: Storage and Distribution) LA11/2022/0009/F.

5.0 ANALYSIS OF 2017 & 2021 ECONOMIC DEVELOPMENT LAND SURVEY FINDINGS FOR FORMER DERRY AND STRABANE DISTRICTS

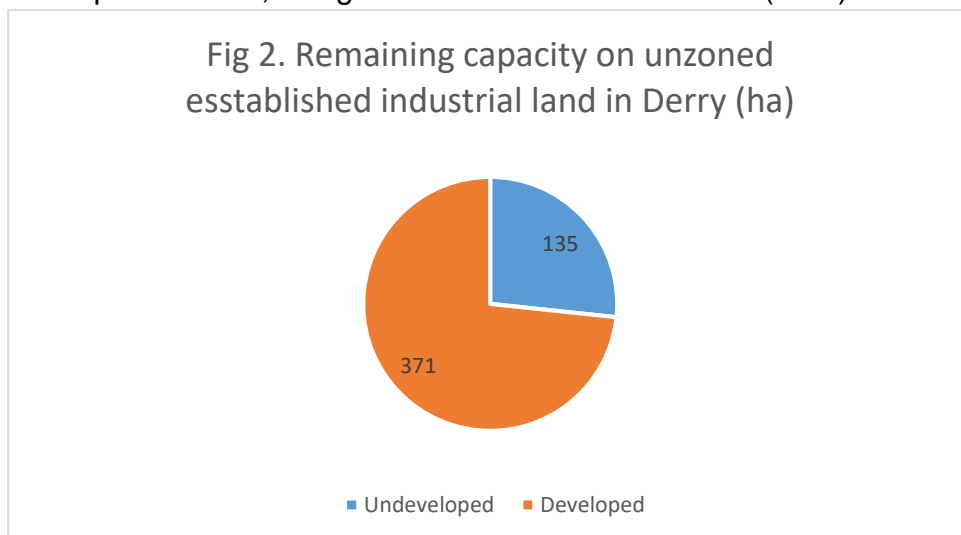
5.1 The EDLM 2021 is an update to the 2017 EDLM. Figures and charts have been updated where possible.

Derry Area Plan 2011

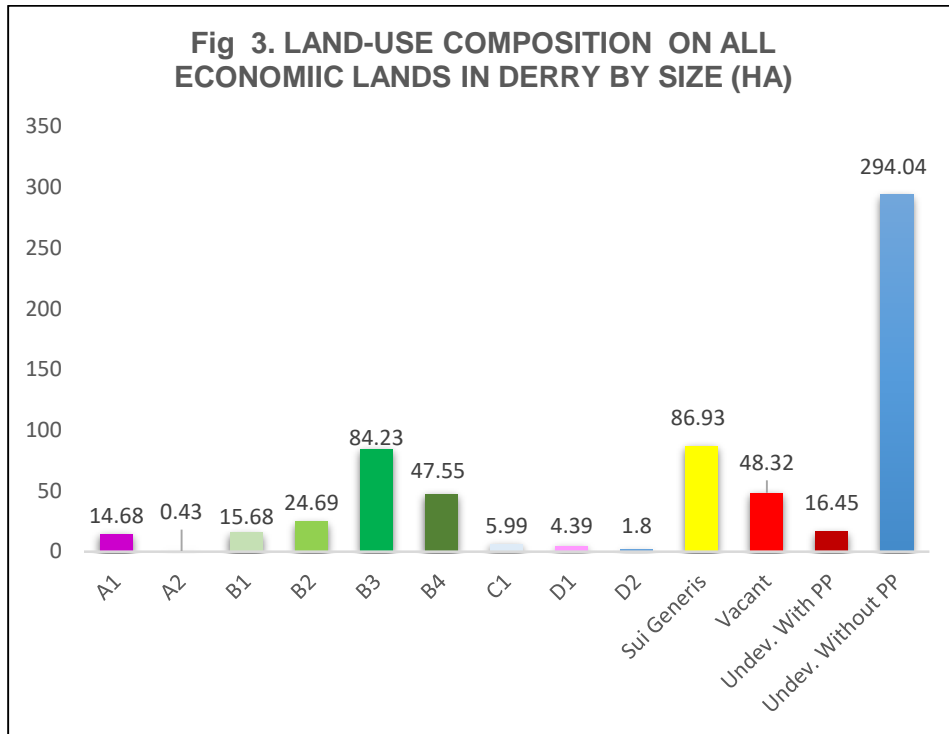
5.2 In terms of remaining capacity on zoned land in Derry, 152.5 ha remained undeveloped in 2017 which equated to 73% of the total zoned land supply. The 2021 situation is shown below with **142.5 ha** remaining undeveloped (blue below) Or 68%, a slight fall following uptake of land.



5.3 In established/ existing (unzoned) areas, 135 ha (27%) of the 501.15 ha remains undeveloped in 2021, a slight decrease from the 169 ha (33%) in 2017.

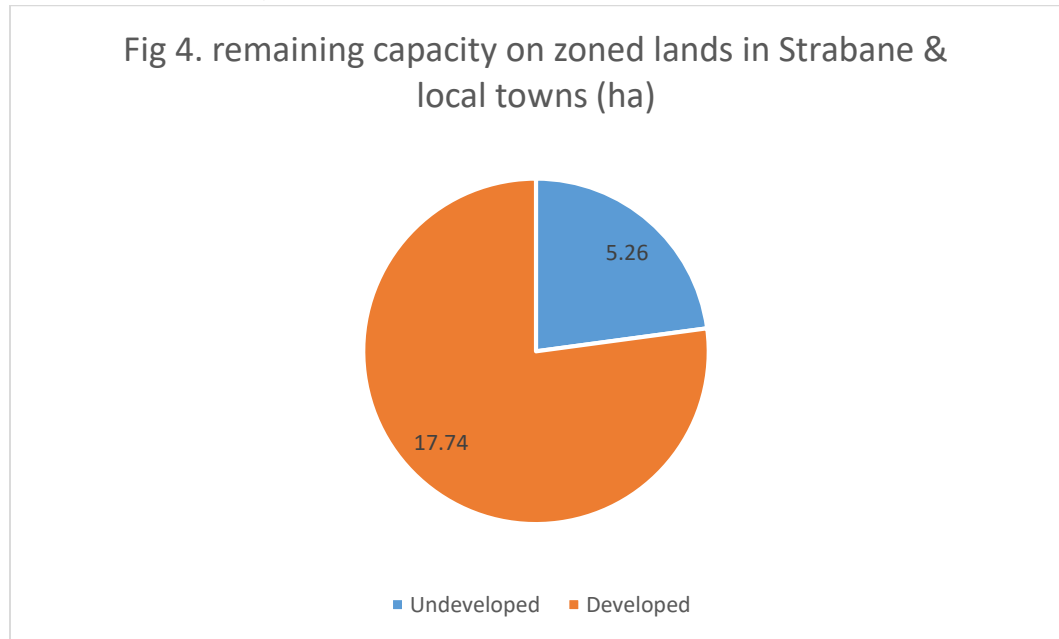


5.4 In terms of land use composition on all zoned and unzoned lands in Derry, there was a predominance of sui generis uses and a notable presence of A1 retail uses. This chart refers to the 2017 situation. It is not thought that there has been a major shift of the relative proportions of the various land uses since then. Please refer to the text for detail of changes on a site by site basis above.

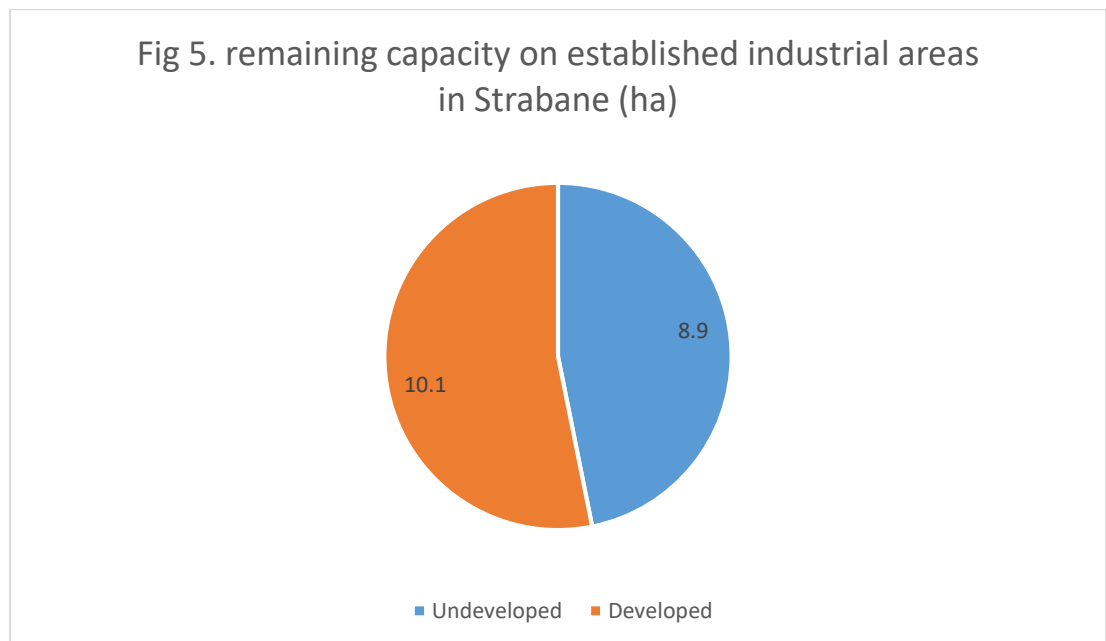


Strabane Area Plan 2001

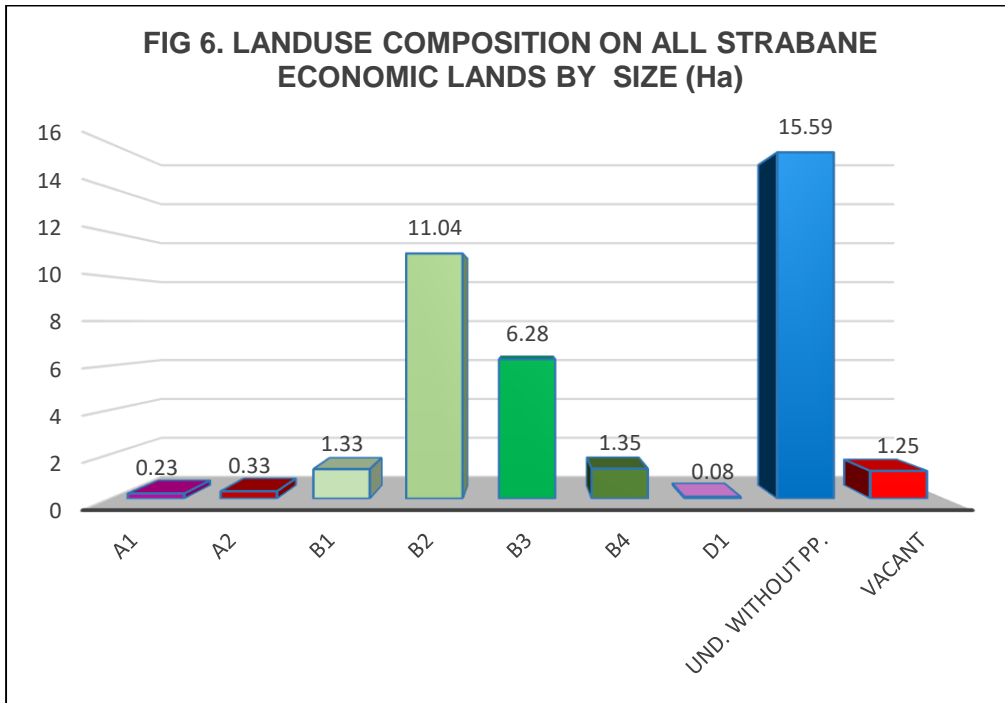
- 5.5 Zonings in Strabane have performed proportionately better with only **5.26 ha** (23%) of 23 ha remaining undeveloped (it was 5.47 ha in 2017 or 24%).



- 5.6 Established economic development areas (unzoned lands have performed reasonably well but **8.9 ha** (47%) of the estimated 19 hectares remaining undeveloped. This figure is unchanged since the 2011 Monitor.

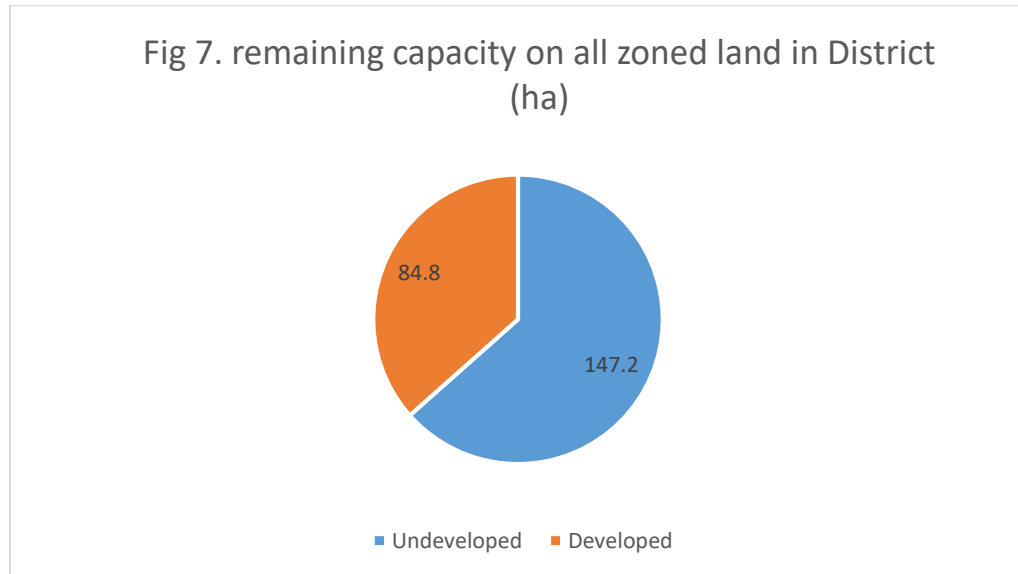


5.7 Proportionately, economic development lands in Strabane perform well in relation to conforming uses such as B1, B2, B3 and B4 uses when compared to Derry. The chart below relates to 2017 figures

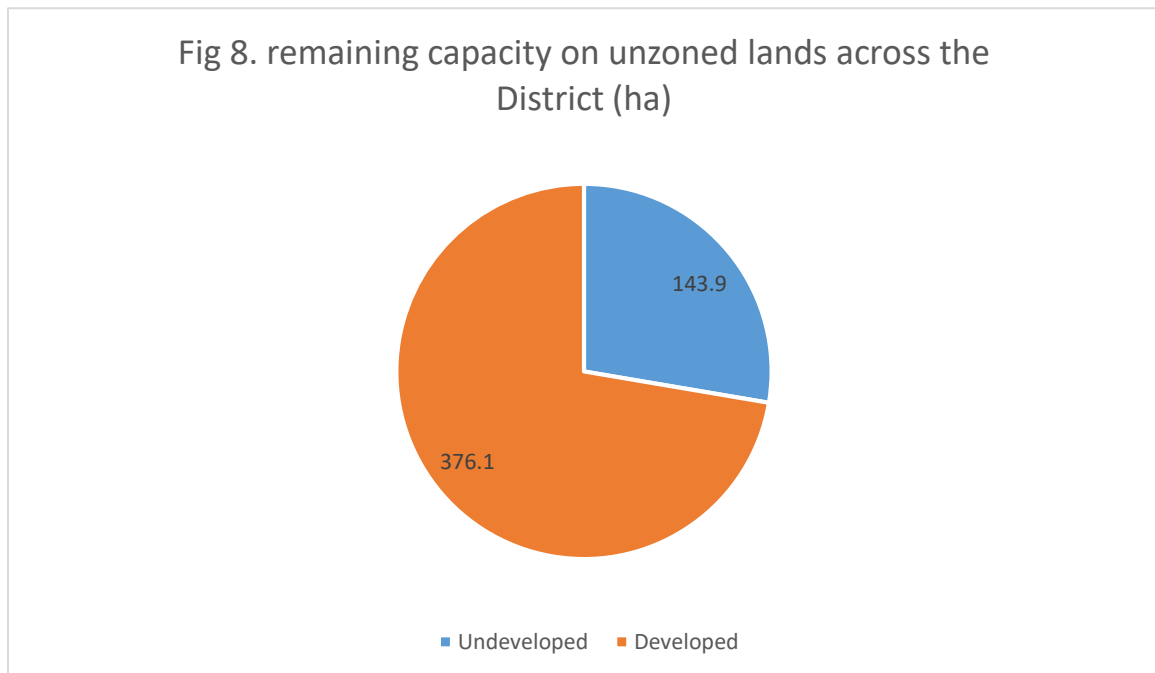


Derry City and Strabane District Council Area – Collective Findings

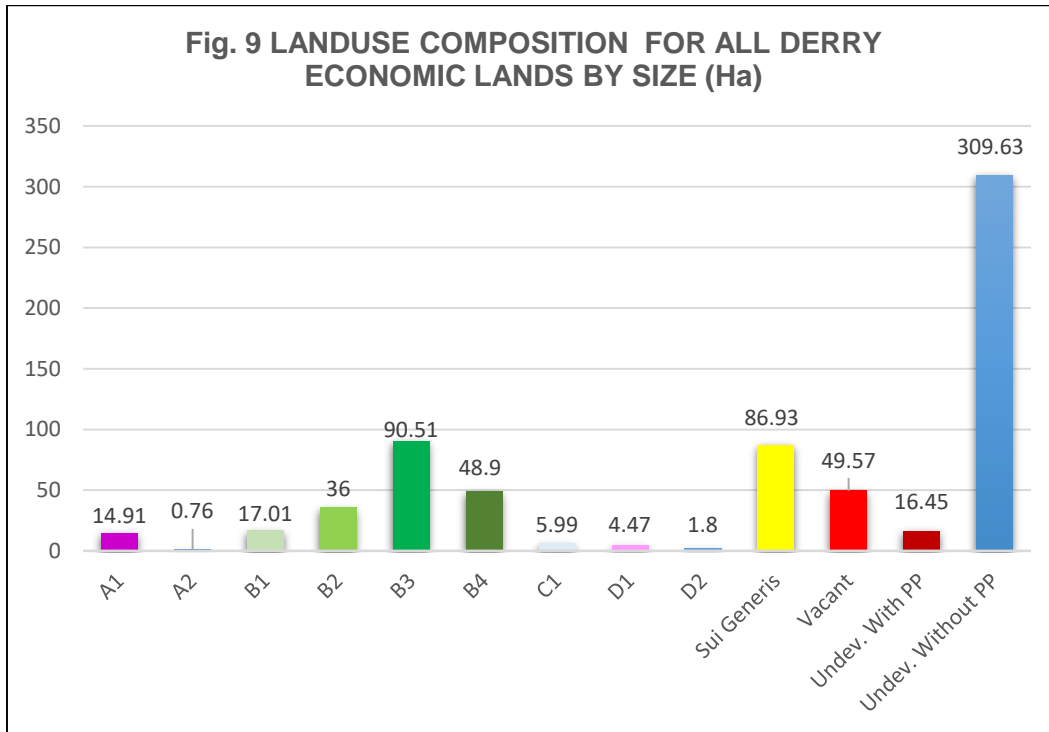
5.8 On a District-wide basis, **147 ha** (63%) of all zoned lands (232 ha) remains undeveloped.



5.9 Approximately **144 ha** land remains undeveloped in established / existing industrial areas, equating to 28% of the total lands supply in this category (520 ha).



5.10 Sui Generis uses are dominant across these sites with a prevalence of A1 uses. This chart refers to 2017 figures but it is not thought that there has been any major change in the relative proportion of different land uses.



6.0 Conclusion

- 6.1 The 2021 survey findings show only modest change in the uptake of land in Derry City and Strabane overall, since the previous Monitors in 2011, 2013 and 2017. However, there has been steady progress and uptake in a number of locations, in both Derry and Strabane.
- 6.2 There is approximately 2 ha of vacant land in Ballycolman and Dublin Road Industrial Estates with approx. 7 hectares of available / undeveloped land at the new Invest NI Strabane Business Park – which is being developed and current applications. There has been a lack of large-scale inward investment into the Council area, with the economic base being largely supported by small and micro businesses, which is illustrated as they are a dominant feature within most of the zoned/unzoned areas.
- 6.3 In the former Derry District, approximately 142.8 hectares of the 209.1 hectares (63%) zoned remain undeveloped. In contrast, of the 15 hectares zoned in Strabane town, less than 1 ha remain undeveloped. Approximately 5 ha of zoned industrial land remains available / undeveloped in the local towns of Strabane District.
- 6.4 Some non-conforming uses were recorded at the time of survey such as the Chinese Takeaway, allotments, ‘Pound’ supermarket, a farm shop, gyms and hairdressers. Additionally, there was also evidence of A2 office uses appearing in these employment areas which are more suited to town centre locations. Although there are some A1 retail uses within these industrial areas, a number of these are connected to light industrial manufacturing units.

Potential Implications for LDP

- 6.5 As it currently stands, the majority of zoned industrial land in Derry, and to a lesser extent – also in Strabane, is peripherally located away from population centres, with poor public transport or active travel linkages and placing a greater reliance on the private car for employees (though they are often well-located for freight and services vehicles). The Preferred Option, which has received broad support, will involve a re-evaluation of non-performing/undeveloped sites with a view to de-zoning or re-zoning and identifying alternative sites. (See initial EDL evaluations at EVB 9b.) These may need to be more centrally and strategically located to allow the small/micro start-up sector to continue flourishing. Growth areas, identified in the Inclusive Strategic Growth Plan, such as Digital Industries

including Business, Professional and Financial Services, Life and Health Sciences and Creative Industries are looking for different type of land and accommodation. They tend to locate in office buildings and in central locations served by a variety of transport modes. The LDP will therefore will be looking to identify locations to accommodate such uses.

- 6.6 Notwithstanding the need to provide for the predicted 'key drivers' as set out above, we also must be mindful that the existing zoned land will still have an important role to play in the evolving manner of the economy. For example, some sites may be suitable for uses that require large sites such as Data Centres, Storage & Distribution (particularly connected to the rise of online business) and advanced manufacturing businesses. Existing sites can also cater for small and medium businesses that do not require to be centrally located, including those that are and those that are not INI clients.
- 6.7 Many of the zoned and existing economic development areas are well located to take advantage of existing infrastructure including transport links such the Foyle Port, the A2, A5 and A6. (Indeed, the new / upgraded roads will provide further opportunities and the LDP can seek to ensure that increased business / economic development can emerge from this public infrastructure investment.) These positive features are attractive to potential tenants and therefore in any further consideration of such zonings, favourable weight will be given to the location of such zonings. However, other environmental and 'sustainability' considerations will also need to be factored in. The future of Culmore, Campsey and Maydown, where approx. 120 hectares of zoned industrial lands remain undeveloped, needs to be carefully considered with relevant stakeholders as the LDP evolves. While there may be a case for re-zoning or de-zoning some of these lands, it is still important that the LDP provides an ample supply of economic development land, at a choice of locations, sizes and types.
- 6.8 While the importance of employment and job creation are keys themes of the Community Plan and the LDP, it is necessary for the LDP to balance this with the long-term well-being of residents who co-exist alongside some of the traditional 'heavy' industries such as Foyle Port, Coolkeeragh Power Station, DuPont and the Foyle Food Group. The LDP needs to carefully consider how any future plans for expansion or inward investment can be accommodated which does not expose the residents of Strathfoyle, Maydown and Culmore to poor air quality, night-time noise, light pollution etc. The LDP will consider the viability of 'sub-zoning' of light/clean ED areas close to built-up residential areas or

environmental receptors, as well as other robust policies which mitigate against potential amenity impacts.

- 6.9 In general, it appears from the findings of the Monitor that we may have an excess of economic development land. The SPPS advises that there should be an ample supply of suitable land available to meet economic development needs within the plan area should be provided. The LDP should also offer a range and choice of sites in terms of size and location to promote flexibility and provide for the varying needs of different types of economic activity. Therefore, it may be prudent to manage the existing land rather than de-zone large swathes of economic land. In addition to this, the LDP will seek to identify suitable areas within the District to accommodate emerging economic drivers, such as those set in paragraph 6.5. It may be the case that such sites could be monitored in the future, either as a standalone office monitor or as part of the economic land monitor.
- 6.10 While the majority of growth will be focused in the larger urban centres of Derry and Strabane, the modest uptake of land may be partly due to the fact that there needs to be an ample supply of zoned sites, such as at Culmore, Skeoge, Buncrana Road, Campsey and Maydown. The new process of plan-making presents an opportunity to shift away from traditional thinking whereby 'industrial' zonings are almost exclusive to Cities and Towns. A new approach to allocating economic development lands should examine the scope for home-working, work-live mixed-use developments and also identifying sustainable, appropriate-scale sites in smaller settlements to facilitate small economic enterprises which align with the notion of '*sustaining vibrant rural communities*'. In terms of the open countryside, policies in regard to small workshop-style developments have also been re-visited so that they are less prescriptive and acknowledge the contribution that micro-businesses make to the rural economy and quality of life, bearing in mind that they are recognised as being a feature of modern rural living.
- 6.11 Opportunities will also arise from the progression of the cross-border North West City Region over the LDP period. Specifically, the LDP needs to take account of the Donegal County Council's Plans for sustainable employment in its nearby settlements including Letterkenny, Lifford, Ballybofey-Stranorlar and Burnfoot-Bridgend. Of particular interest is the future development of Bridgend and the proposed SEDOS, which would be in close proximity to the Derry settlement limit and the industry zoning at Elagh Business Park. This may provide post-Brexit trading opportunities on either side, with important compatibility of roads

proposals, greenways and aesthetic appearance of this key gateway which stretches from Bridgend through Buncrana Road, Skeoge Roundabout and onward along the 'A2 economic corridor'.

- 6.12 In order to accommodate the above-mentioned challenges and take advantage of the opportunities for growth (15,000 more jobs in the District), the LDP dPS (Chapter 9) has indicated a wide range of types of Employment Opportunity Areas that will be Zoned at the LDP LPP stage, plus supportive Planning policies. Further supporting information is provided in Evidence Base Papers EVB 9 and EVB 9b.