



Derry City & Strabane  
District Council

Comhairle Chathair  
Dholre & Cheantar  
an tSrátha Báin

Derry Citty & Strabane  
Districk Council

DERRY CITY & STRABANE DISTRICT COUNCIL

# LOCAL DEVELOPMENT PLAN (LDP) 2032



DRAFT PLAN STRATEGY

Economic Land Monitor 2017

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## 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 the annual *Economic 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**

- 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. 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 aim of the Monitor is 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 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 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 Land Survey 2017

- 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 June 2017 fact sheet publication for the District, state that the top investors in the District are Seagate Technology, OneSource Virtual, Allstate, Convergys and McColgans Quality Foods.
- 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
<b>Class B1 Business</b>	(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.
<b>Class B2 Light Industrial</b>	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.
<b>Class B3: General Industrial</b>	Use for the carrying on of any industrial process other than one falling within class B2.
<b>Class B4: Storage and Distribution</b>	Use for storage and distribution

- 2.3 For the remainder of this paper survey findings will refer to ‘*economic lands*’ as opposed to ‘*industrial*’ in order to avoid confusion.

- 2.4 Based on the ‘*industrial*’ zonings shown in the Derry Area Plan 2011 and Strabane Area Plan 2001, these sites which largely lie within defined settlement limits were visited. The 2017 monitor was carried out during the months of June and July 2017 and involved on-site inspections with changes to the survey findings of 2011 and 2013 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 ‘*Industrial and Business Uses*’ of the Planning (Use Classes) Order (Northern Ireland) 2015.

### Methodology

- 2.5 What was monitored?
- 2.6 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, were monitored. In addition to this, there are a number of significant zoned and existing industrial sites outside Derry at locations such Campsie and Maydown, were monitored also. 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.
- 2.7 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.

The monitor will identify the following:

- Type of site (zoned/unzoned)
- Site Area (zoned/unzoned)
- Amount of land developed, undeveloped or vacant
- Type of business use on site (classified according to the Planning (Use Classes) Order (NI) 2015)
- Floorspace and Site Area used (per business use class)
- Current planning status i.e. has an undeveloped site planning permission?
- Name of businesses

## Reports

- 2.8 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 survey and 2017 survey (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

- 2.9 The site boundary of each monitored site will also be 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 rateable classifications and rateable value of the site/building. For the purposes of this monitor, floor space will be based on the gross area of each building surveyed rather than individual internal floor space layouts. This will enable maps of the zonings and established industrial/economic development land to be produced to accompany the monitoring reports. Images from our GIS Database have been produced in this report, however better quality images can be requested from our GIS Database on a case by case basis.





### 3.0 Former Derry City Council District– 2017 Monitor Findings

3.1 As set in Paragraph 2.8, the findings of the monitor can be presented in number of ways upon request. This paper will set out an overview of the main findings for District and the main sites. It will mainly outline the remaining capacity on zoned land and unzoned existing economic development land, as well giving a brief overview of the individual sites and visual GIS presentation of the site.

#### Zoned land in former Derry City Council District

3.2 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 Derry District, 152.5 hectares of the 209.1 hectares (73%) zoned remain undeveloped, of which approximately 3 hectares (2017 survey) have planning commitments.

**Table 2: 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
IND 1 Culmore	Derry	44.5	42.1	42.1
IND 2 Skeoge	Derry	30.2	15.9	15.9
IND 3 Buncrana Road	Derry	14.4	10.2	10.2
IND 4 Springtown	Derry	4.2	0	0
IND 5 Campsie	Derry	21.1	13.4	13.4
IND 6 Maydown	Derry	79.3	65.3	65.3
IND 7 Newbuildings	Derry	13.5	5.6	5.6
MU 1 Iona Park (Mixed Use)	Derry	1.9	0	0
<b>Derry Total</b>		<b>209.1</b>	<b>152.5 (73%)</b>	<b>152.5 (73%)</b>

3.2 Uptake of the zonings has varied between sites in Derry District, with no significant development at Culmore. At the time of adoption of the Plan, this site accommodated the meat factory on a small part only (2.34ha), and this remains the only occupier. Around 82% (65ha) of the zoning at Maydown remains undeveloped, while around 64% (13ha) of the zoning at Campsie remains undeveloped. 7ha of the zoning has been developed for Perfecseal. There is also

existing industry at both Maydown and Campsey as shown in the DAP 2011. In Newbuildings, around 42% (6ha) of the zoning remains undeveloped.

- 3.3 Apart from Maydown and Newbuildings, 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. This is in keeping with PPS4 which, in the main, promotes zonings to be for “economic development” needs rather than the previous “industrial zonings”. However, some non-conforming uses have occurred, with retail uses being common in Bunrana Road and Newbuildings.
- 3.4 Invest NI is a major public sector landowner within the Council area. Its holdings in Campsey, Skeoge, Maydown and Springtown total approximately 168 ha, of which nearly 43 ha remains available for development at Campsey, Skeoge and Maydown by qualifying businesses with an approved business case.

Overview of each Zoned site in DAP 2011

**IND 1 Culmore**



Figure 1 - IND 1 Culmore

- 3.5 Figure 1 above shows the zoned industrial land at Culmore. The predominant use of the developed area is B3 making up 100% of the industrial use on the site. Although it is worth noting that majority of the site is vacant land with no current planning permission with, 95% of land being vacant undeveloped land and the remaining 5% classed as B3.

### IND 2 Skeoge

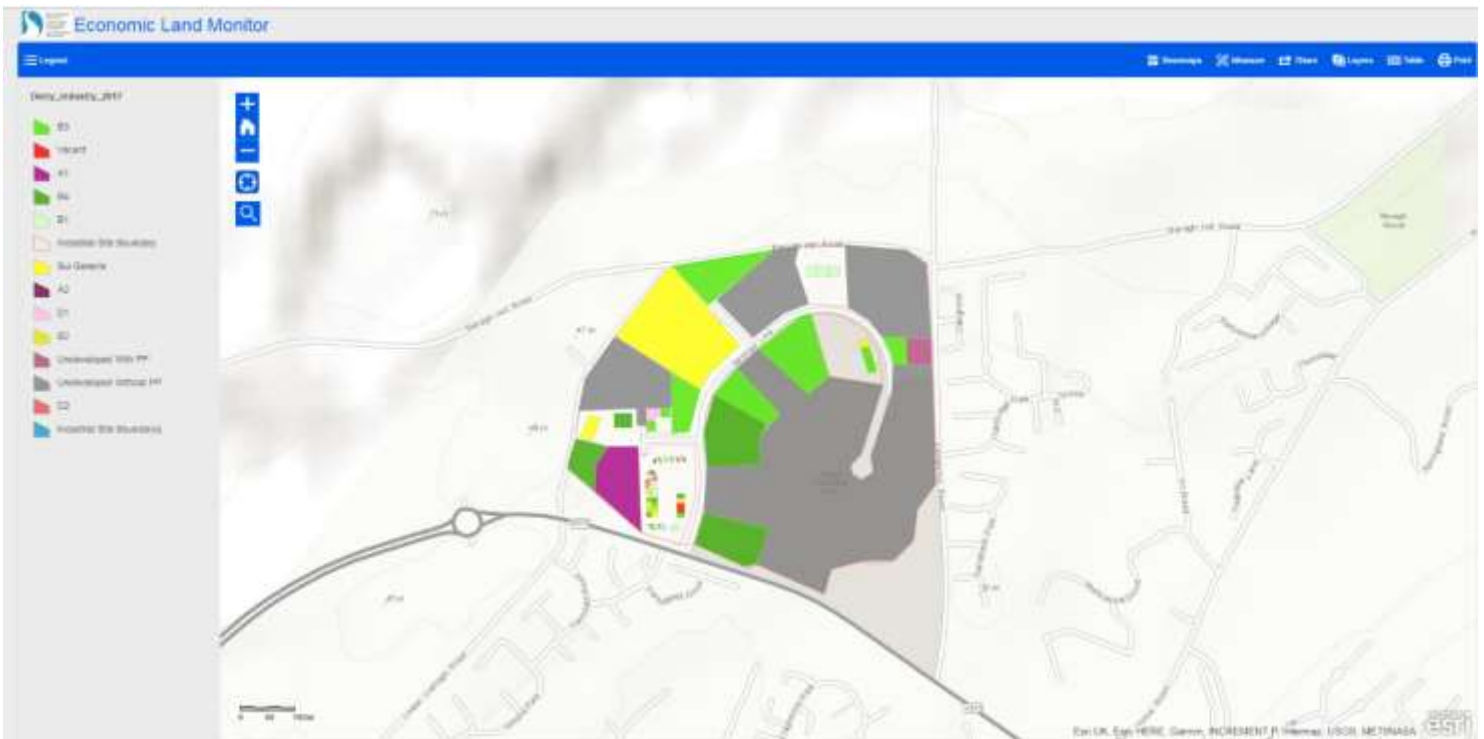


Figure 2- IND 2 Skeoge Industrial Estate

- 3.6 Figure 2 above shows the zoned industrial land at Skeoge Industrial Estate. The predominant use of the developed area is B4, making up approximately 62.3% of the industrial use on the site with the other remaining uses such as; B3 making up approximately 32.1%, Other uses 2.3%, B1 Offices 2.2%, Vacant Buildings 1% and B2 0.1%. Although it is worth noting that majority of the site is vacant undeveloped land with no current planning permission with, approximately 64% of land being vacant and the remaining 36% classed into each industrial use identified.

## IND 3 Buncrana Road



Figure 3 - IND 3 Buncrana Road

- 3.7 Figure 3 above shows the zoned industrial land at Buncrana Road. The predominant use of the developed area is B4 making up 49.2% of the industrial use on site with other remaining uses other uses making up 43.8% and vacant buildings making up 7%. Although it is worth noting that majority of the site is vacant undeveloped land, 2.407 Ha of this undeveloped area has planning permission and the remaining 6.795 Ha does not have any planning permission. The Vacant undeveloped area of the site accounts for 75% of the site and the remaining 25% is classed into each industrial use identified.

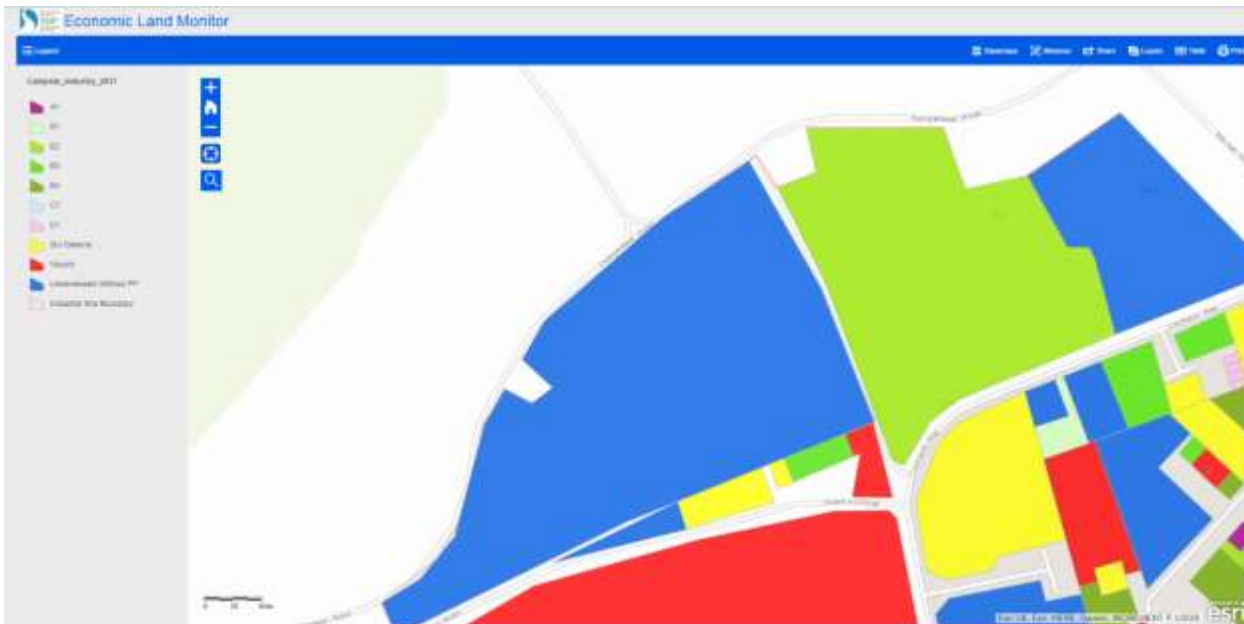
## IND 4 Seagate



Figure 4 – IND 4 Seagate

3.8 Figure 4 above shows the zoned industrial land occupied by Seagate Technology. This 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



- 3.9 Figure 5 above shows the zoned industrial land at Campsie Industrial Estate. This zoning refers to Northern part of the site (North of Kean’s Hill Rd and McClean Rd. The predominant use on within the zoning is considered to be B2 light industry accounting for approximately 90% of the developed area. The remainder is land lost to other developments. Majority of the site is undeveloped vacant land available for development. This vacant undeveloped land accounts for for approximately 64% of the overall site, with the remaining 36% classed into each industrial use identified.



## IND 6 Maydown

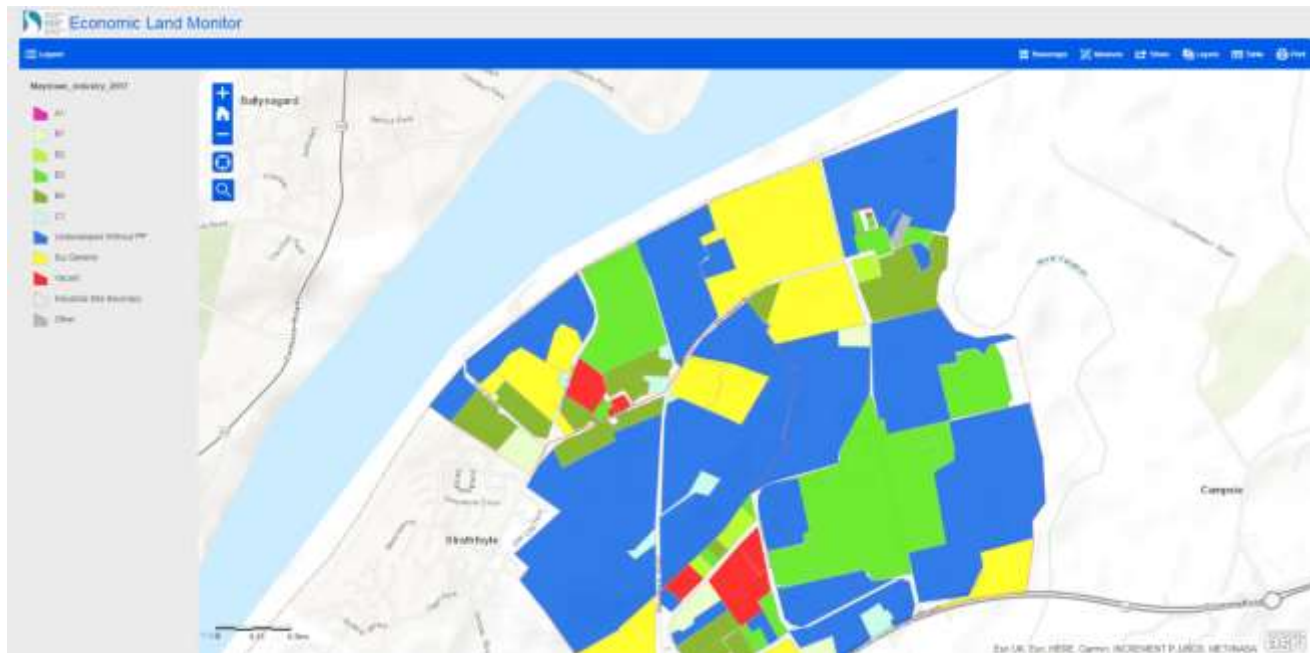


Figure 6 - IND 6 Maydown

- 3.10 Figure 6 above shows the zoned industrial land at Maydown. The middle section of the Maydown site is zoned, whereas the rest of the site is considered as existing industrial land. The predominant use of the zoned developed area is considered to be other uses which accompany the main industrial uses, which approximately accounts for over half of the developed land. The main industrial use is B4 storage and distribution approximately making up a third of the developed area. With the remaining considered to be land lost to other development. The zoned area of Maydown is largely vacant undeveloped land with no current planning permission with, approximately 85% of the zoned land considered as vacant land available for development and the remaining the 15% classed as developed as B4 and other uses.

## IND 7 Newbuildings



Figure 7 - IND 7 Newbuildings

- 3.11 Figure 7 above shows the zoned industrial land at Newbuildings. The predominant use of the developed area is considered to be B3 General Industry which approximately accounts for half of the developed land, this is accompanied by minor B1 office and B4 storage and distribution uses. Other uses approximately covers 44% of the developed land. The zoned village site has developed land covering approximately 56% of the overall site whereas the remaining 46% is considered vacant land available for development.

## MU 1 Iona Park



Figure 8 - MU 1 Iona Park

- 3.12 Figure 8 above shows the zoned mixed use Iona Park. The predominant use of the developed area is considered to be land lost to other development, which is referring to the Iona Park housing estate, accounting for approximately 93% of the developed area. The main industrial uses are B1 offices & B3 general industry which combined make up approximately 4% of the developed land. The zoned site of Iona Park is considered to be fully developed, having no available vacant land for development.

### Existing Economic Land in Derry 2017 – Estimated Remaining Capacity

- 3.13 There is an additional approximately 103 ha of existing industrial land on 14 sites across Derry City, 9 in the Cityside and 5 in the Waterside. While uptake and occupancy is generally good, there still remains approximately 13.92 hectares of undeveloped with vacant units which equate to roughly 11 hectares.

**Table 4: Remaining Capacity on Existing Employment Land 2017**

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	0.04
Derry - Cityside	Northland Road	2.15	0.5	0.2
Derry - Cityside	Pennyburn	24.04	1.7	6.1
Derry - Cityside	Rath Mor	1.99	0	0.09
Derry - Cityside	Seagate	8.33	0	0
Derry - Cityside	Springtown	35.04	1	3.6
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	0.4
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	0.5
Derry – Waterside	Trench Road	0.68	0	0.4
<b>Total</b>		<b>111.51</b>	<b>13.62</b>	<b>12</b>

- 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

- 3.15 Figure 9 above shows the existing industrial land situated at Bay Road. The predominant use of the developed area is considered to be other uses accounting for approximately half of the developed area. The other half of the industrial site comprises of B1 offices, B3 general industry & B4 storage and distribution and 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.

## Lenamore



Figure 10 - Existing Employment Land Lenamore

- 3.16 Figure 10 above shows the existing industrial land situated at Lenamore. The predominant use of the area is considered to be other uses approximately accounting for just under half of the industrial land. This is accompanied with the B1 office, B2 light industry and B3 general industry which combined makes up approximately 35% of the site and the remaining part of the site is 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.



## Northland Road



Figure 11 - Existing Employment Land Northland Road

- 3.17 Figure 11 above shows the existing industrial land situated at the Northland Road Industrial Estate. The predominant use of the developed area is considered to be vacant buildings approximately accounting for 37% of the site. The main industrial uses B1 offices, B2 light industry, B3 general industry & B4 storage and distribution combined account for over half of the developed area, with storage and distribution the most prevalent of the main industrial uses at 24%. The existing employment land is not designated by an industrial zoning and, is considered to be slightly above half developed with approximately 53% of developed land situated within the site boundary. The remaining 47% is considered to be vacant land available for development.

## Pennyburn



Figure 12 - Existing Employment Land Pennyburn

3.18 Figure 12 above shows existing employment the land situated at the Pennyburn Industrial Estate. The predominant use of the developed area is considered to be other uses approximately making up 41% of the site, this is closely followed by vacant buildings approximately amounting to 35% of the developed area. The remaining 23% is made up of the main industrial uses B1 office, B2 light industry, B3 general industry & B4 storage and distribution. The existing employment land is not designated by an industrial zoning and, majority of the land is considered to be largely developed approximately accounting for 91% of the site. The remaining 9% is considered to be vacant land available for development.

## Rath Mor



Figure 13 - Existing Employment Land Rath Mor

3.20 Figure 13 above shows the existing employment land situated at the Rath Mor Business Park. The predominant use of the developed area is considered to be B4 storage & distribution approximately accounting for 29%, closely followed by B3 general industry approximately making up 27% of the developed area. The main industrial uses B1 office, B2 light industry, B3 general industry & B4 storage and distribution combined amounts approximately to 70% of developed area. The remaining 30% of the site is considered to be other uses and 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.

## Seagate



Figure 14 - Existing Employment Land Seagate

3.21 Figure 14 above shows the existing employment land occupied by Seagate Technology. This existing industrial land refers to the second half of the site occupied by Seagate, which covers the remaining 3.96 Ha of the area. The predominant and 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.

## Springtown



Figure 15 –Existing Employment Land Springtown Industrial Estate

3.22 Figure 15 above shows the existing employment land situated at the Springtown Industrial Estate. The predominant use of the developed area is considered to be other uses accounting for approximately a third of the developed land within the site. These other uses are complimentary to the main industrial uses B1 office, B2 light industry, B3 general industry & B4 storage and distribution which combined, approximately account for 43% of the developed land within the site, with B3 General Industry being the predominant industrial class. The remaining part of the developed site is vacant buildings. The existing employment land is not designated by an industrial zoning and majority of the Springtown Industrial Estate is developed accounting for approximately 85% of the site with the remaining 15% considered available for development.

## Ulster Science & Technology Park



Figure 16 – Existing Employment Land Ulster Science & Technology Park

3.23 Figure 16 above shows the existing employment land situated at the Ulster Science and Technology Park. The site is predominately made up of vacant buildings with approximately two-thirds of the site falling under this category. The remaining third of the site is made up of B1 office use. 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.



## Fort George



Figure 17 - Existing Employment Land Fort George

- 3.24 Figure 17 above shows the existing employment land situated at Fort George. The site is largely undeveloped, but the predominant industrial use of the developed area is B1 office use. Combined with the other use, this accounts for approx. a third of the site. The remaining two-thirds of the site is undeveloped land which is considered to undeveloped vacant land with planning permission.

## Altnagelvin



Figure 18 - Existing Employment Land Altnagelvin

3.25 Figure 18 above shows the existing employment situated at Altnagelvin. The predominant use of the developed site area is considered to be B4 storage and distribution which approximately accounts for around half of the site. B1 office and B3 general industry combined with B4 storage and distribution approximately makes up two thirds of the site. The remaining third of the site is made up of other uses and 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.

## Drumahoe

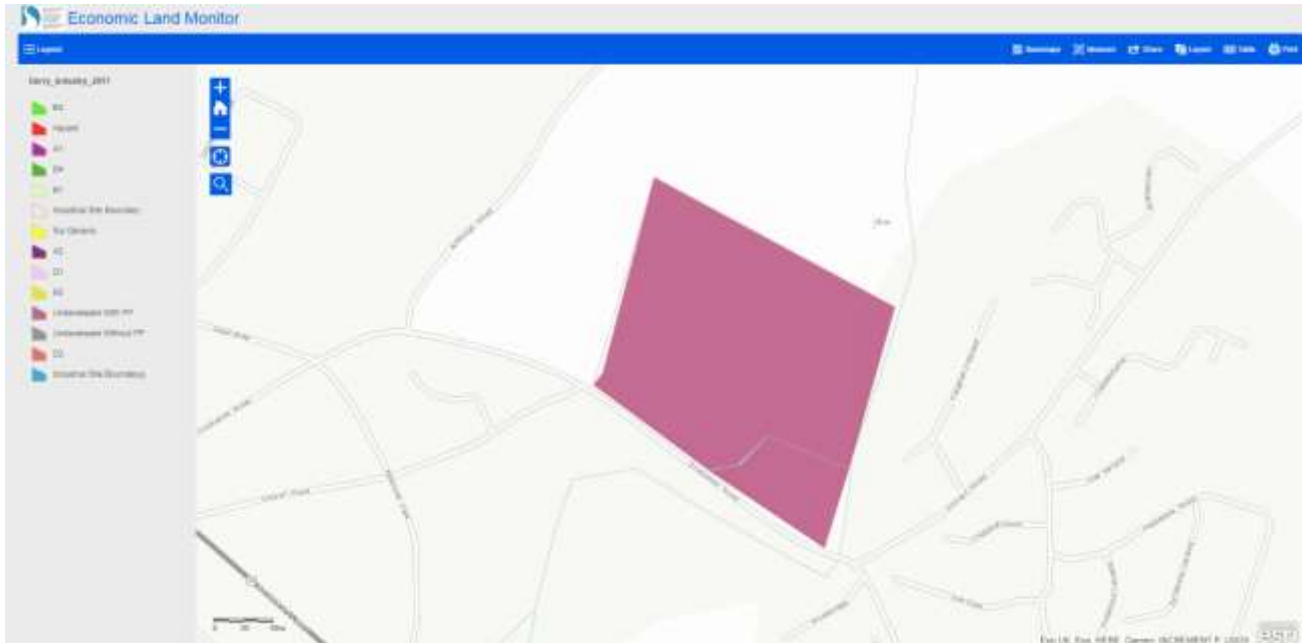


Figure 19 - Existing Employment Land Drumahoe

- 3.26 Figure 19 above shows the existing employment land situated at Drumahoe. The site is completely undeveloped. The site has history of planning permission for non-economic uses.

## Glendermott Road



Figure 20 - Existing Employment Land Glendermott Road

3.27 Figure 20 above shows the existing employment land situated along the Glendermott Road. The site is largely developed and the predominant use is B3 general industry accounting for approximately 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, majority of the land is considered to be largely developed approximately accounting for 75% of the site. The remaining 25% is considered to be vacant land available for development.

## Glendermott Valley Business Park



Figure 21 - Existing Employment Land Glendermott Valley Business Park

3.28 Figure 21 above shows the existing employment land situated at Glendermott Valley Business Park. The predominant use of the site is considered to be other uses which approximately accounts for over half of the site, followed by vacant buildings which accounts approximately for a third of the site. The remainder of the site is made up with B1 office use and B3 general 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.

## Trench Road



Figure 22 - Existing Employment Land Trench Road

3.29 Figure 22 above shows the existing employment land situated along the Trench Road. The predominant use of the site is B2 light industry and B3 general industry which covers approximately 90% of the site boundary, the remainder of the site is made up of other uses. 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.



### Existing Economic Land in Derry rural 2017 – Estimated Remaining Capacity

- 3.30 In addition to the existing land in Derry city, there is approximately 155.2Ha undeveloped and 41.25Ha vacant in the settlements and rural area of the former Derry City Council Area.

**Table 5: Derry Villages and Countryside Sites 2017 - Estimated Remaining Capacity (ha) on Existing Industrial Land**

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	2.05
Village	Eglinton – Rural	3.78	0.9	0.2
Village	Eglinton Village	5.11	1.5	0.6
Village	Newbuildings Business Centre	0.18	0	0.1
Village	Newbuildings – Woodside Road	2.92	0	2.92
Countryside	Campsie	89.81	25	25.782
Countryside	Maydown	274.12	127.7	9.076
Countryside	Longfield	13.23	0.1	0.5
	<b>Total</b>	<b>394.31</b>	<b>155.2</b>	<b>41.25</b>

#### **Ardmore, Chambers & Claudy**

- 3.31 The rural villages of Ardmore, Chambers and Claudy all are existing industrial land. The predominant industrial use across Ardmore and Chambers is B3 general industry which accounts for 100% of the site. Whereas in Claudy the site is largely vacant buildings approximately accounting for 95% and the remainder of site consists of B3 general industry. All three villages are existing employment land which are not designated by an industrial zoning and, is considered to be fully developed, having no available vacant land for development.

## Eglinton – Rural



Figure 23 - Rural Existing Employment Land Eglinton Rural

- 3.32 Figure 23 above shows the rural existing employment land just outside of Eglinton. The site is predominately vacant buildings which approximately makes up 44% of the developed land. Accompanying this is other uses approximately accounting for 25% and land lost to other development approximately taking 24%. The remaining area of the developed land is made up of B3 general industry & B4 storage and distribution. Approximately 52% of the overall site is considered to be undeveloped land without planning permission which is available for development. The remaining 48% consists of the uses identified above.

## Eglinton – Village



Figure 24 - Rural Existing Employment Land Eglinton Village

- 3.33 Figure 24 above shows the rural existing employment land within Eglinton village. The predominant use is classed as other uses covering approximately half of the developed area. Accompanying this is vacant buildings which approximately accounts for 25% of the developed area, and the remaining quarter is made up with a mix of B1 office use, B3 general industry and B4 storage & distribution, with B3 the most prevalent of the main industrial uses. The majority of the overall site is considered to be undeveloped land without planning permission which is available for development approximately covering 54% of the site, the remaining 46% is developed consisting of the uses identified above.

## Newbuildings Business Centre

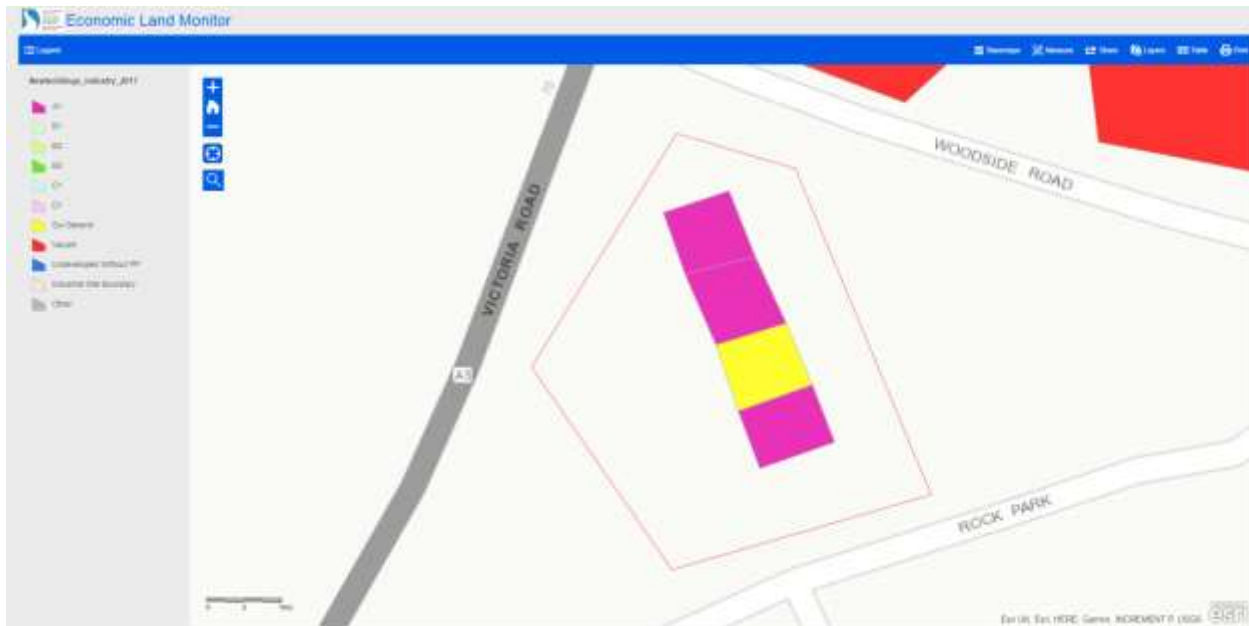


Figure 25 - Rural Existing Employment Land Newbuildings Business Centre

3.34 Figure 25 above shows the rural existing employment land situated at Newbuildings Business Centre. The predominant and sole use within the business centre is classed as other uses. 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.

## Newbuildings – Woodside Road



Figure 26 - Rural Existing Employment Land Newbuildings Woodside Road

3.35 Figure 26 above shows the rural existing employment land situated at Newbuildings alongside the Woodside Road. 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.

## Campsie



Figure 27 - Rural Existing Employment Land Campsie

- 3.36 Figure 27 above shows the rural existing employment land at Campsie Industrial Estate. The top part of the site is zoned as industrial land and the rest is considered to be existing employment land. Of this existing land the predominant use of the developed area is considered to be vacant buildings approximately making up 44% of the site. The main industrial uses B1, B2, B3 & B4 combined account approximately for 30%, with B3 & B4 the largest uses within. Most of the Campsie Industrial Estate is developed accounting for approximately 70% of the site with the remaining 30% considered available for development



## Maydown

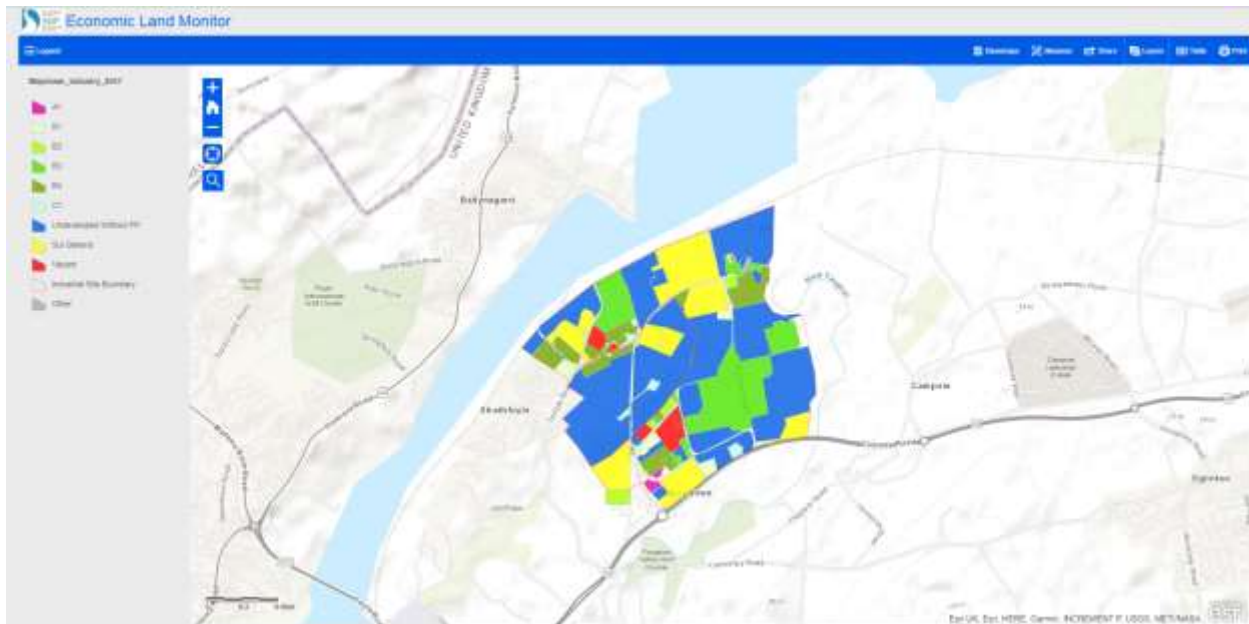


Figure 28 - Rural Existing Employment Land Maydown

3.37 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. The predominant use of the existing employment land is B3 general industry accounting for approximately 36% of the developed area. The main industrial uses B1 office, B2 light industry, B3 general industry and B4 storage & distribution combined make up approximately 58% of the developed area. The remaining 42% consists of other uses, vacant buildings and land lost to other developments. The developed area of the Maydown site covers approximately 54% of the land, the remaining 46% is considered to be vacant undeveloped land available for development.

## Longfield

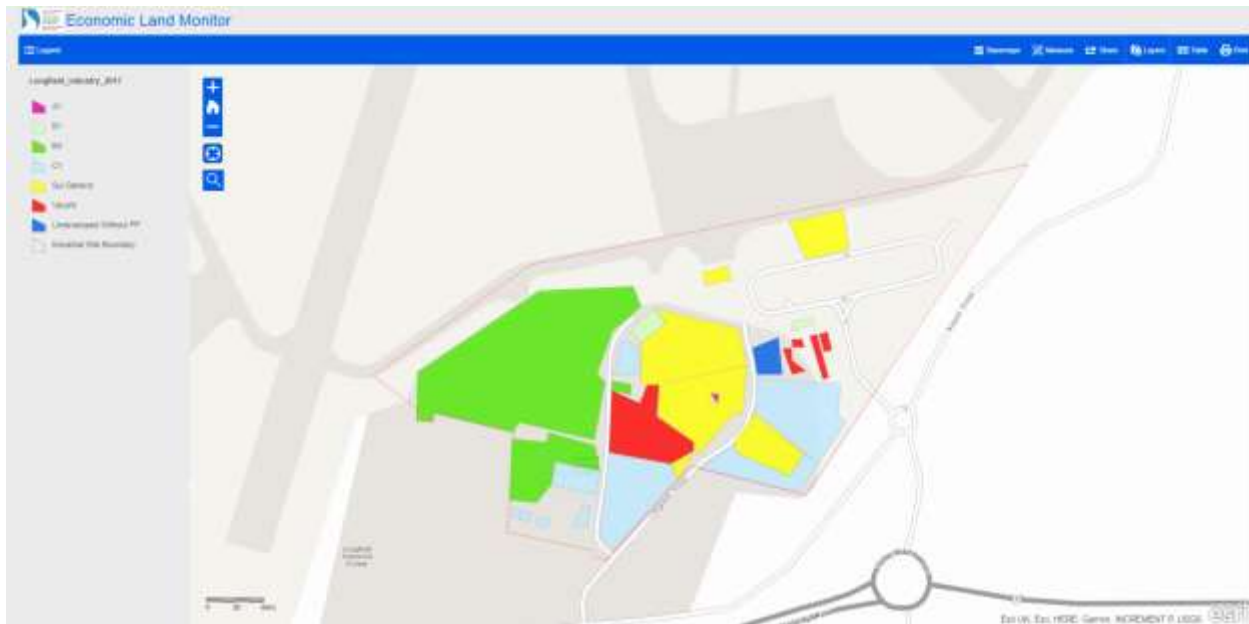


Figure 29 - Rural Existing Employment Land Longfield

- 3.38 Figure 29 above shows the existing employment land at Longfield Industrial Estate. The predominant use of the site is classed as other uses which approximately accounts for half of the developed area. B3 general industry and B1 office use combined approximately account for 38% of the developed area. The remainder of the developed area is made up of vacant buildings. The developed land covers approximately 95% of the overall site with the remaining 5% considered to be vacant undeveloped land with no planning permission which is available for development.

#### 4.0 Former Derry City Council District– 2017 Monitor Findings

- 4.1 The Strabane Area Plan 2001 zoned land for industrial purposes in the hub of Strabane and in the local towns of Castledearg, Newtownstewart and Sion Mills. In contrast, of the 15 hectares zoned in Strabane town, less than 4 hectares remain undeveloped with only 1.3 hectares remaining at Dublin Road and 2.65 hectares at Orchard Road. Around 5 hectares of zoned industrial land remains undeveloped in the local towns of Strabane District. 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 Lands Surveys 2011 & 2017 – Estimated Remaining Capacity (ha)**

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

\*Source: DOE Industrial Site Survey 2011

- 4.2 In Strabane, Invest NI's main landholding was at Orchard Road where some 9 hectares of their original holding have been sold to client companies, the local enterprise agency and Roads Service. Of the remaining 1.6 hectares, only 0.93 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 22 acres (c.8.9ha) of serviced land for potential investors. At the date of the monitor Invest NI advised that firms have declared an interest in acquiring sites and a planning application was under consideration at the time of the monitor.

### Strabane Town – Dublin Road



Figure 30 - Strabane Zoned Industrial Land Dublin Road

- 4.3 Figure 30 above shows the zoned industrial land at Dublin Road Industrial Estate. 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. The predominant use of the zoned site is B2 light industry which approximately accounts for 65% of the developed area. B4 storage & distribution makes up approximately 20% of the developed area, and the remaining 15% consists of other uses and vacant buildings. The developed area of the site makes up approximately 89% of the zoned site, the remaining 11% is considered to be vacant undeveloped land without planning permission which is available for development.

## Strabane Town – Orchard Road



Figure 31 - Strabane Zoned Industrial Land Orchard Road

- 4.4 Figure 31 above shows the zoned industrial land at Orchard Road Industrial Estate. The zoning refers to the whole site shown above. The predominant use of the zoned site is B3 general industry accounting for approximately 60%. B2 light industry approximately covers 20% of the site, B1 office use makes up around 15% of the developed land. The remaining 5% of the developed area consists of other uses and vacant buildings. 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.

## Castledearg



Figure 32 – Castledearg Zoned Industrial Land Castlegore Road

- 4.5 Figure 32 above shows the zoned industrial land situated in Castledearg. This zoning refers to the whole site. The predominant use of the developed area is considered to be other uses which approximately accounts for two thirds of developed area, the remaining third is made up of a combination of B2 light industry and B3 general industry. The majority of the overall site is considered to be undeveloped land without planning permission which is available for development approximately covering 52% of the site, the remaining 48% is developed consisting of the uses identified above.



## Newtownstewart



Figure 33 – Newtownstewart Zoned Industrial Land

- 4.6 Figure 33 above shows the zoned industrial land situated in Newtownstewart. This zoning refers to the whole site. The predominant use of the site developed area is B2 light industry accounting for approximately 80%, B4 storage and distribution makes up the remaining 20%. The zoned land is considered to be fully developed, having no available vacant land for development.

## Sion Mills



Figure 34 - Sion Mills Zoned Industrial Land

- 4.7 Figure 34 shows the zoned industrial land at Sion Mills. This zoning refers to the whole site. The zoned site is solely made up of vacant undeveloped land.

### Existing Employment Land in Strabane 2017-Estimated Remaining Capacity

- 4.3 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 soon (LA11/2016/0755/F). There has been no significant happenings at Ballycolman and it is noted that permission was recently granted under LA11/2016/0158/F for a change of use from industrial unit to childcare facility.

**Table 7: Estimated Remaining Capacity (ha) on Existing Industrial Sites**

Settlement	Location	Area Zoned (Approx. ha)	Area Remaining Undeveloped (approx. ha)	Area Remaining Undeveloped (approx. ha)
			2011 *	2017
<b>Strabane Town</b>	Ballycolman Industrial Estate	<b>3.9</b>	<b>0</b>	<b>0</b>
<b>Strabane Town</b>	Dublin Road Industrial Estate	<b>6.2</b>	<b>0</b>	<b>0</b>
<b>Strabane Town</b>	Strabane Business Park	<b>8.9</b>	<b>8.9</b>	<b>8.9</b>
	Total	19.0	8.9	8.9

## Ballycolman Industrial Estate

- 4.4 The existing employment land at the Ballycolman Industrial Estate is not designated by any zoning, the predominant use of the developed area is B2 light industry and B4 storage and Distribution which account for approximately two thirds of the site. The remaining third 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.

## Dublin Road Industrial Estate



Figure 35 - Existing Employment Land Dublin Road Industrial Estate

- 4.5 Figure 35 above shows the existing employment land at Dublin Road Industrial Estate. This existing industrial site is referring to the remaining 8.23 ha of the site that is not zoned. The predominant use of this existing employment land is B2 light industry which approximately accounts for 47% of the site. This is accompanied with other uses which approximately makes up 35% of the site. Vacant buildings throughout the site accounts for approximately 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



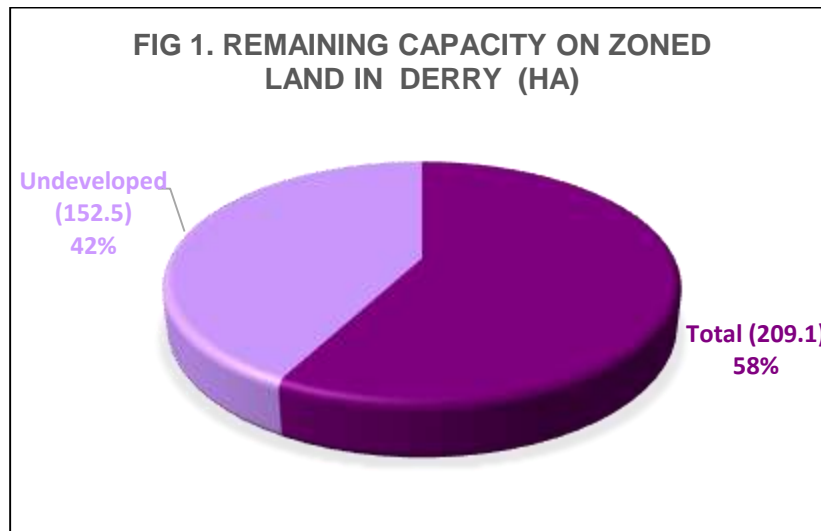
Figure 36 - Existing Employment Land Strabane Business Park

4.6 Figure 36 above shows the existing employment land at Strabane Business Park, this site is not designated by any zonings and is solely vacant undeveloped land with no planning permission.

## 5.0 GIS ANALYSIS OF 2017 ECONOMIC LAND SURVEY FINDINGS FOR FORMER DERRY AND STRABANE DISTRICTS

### Derry Area Plan 2011

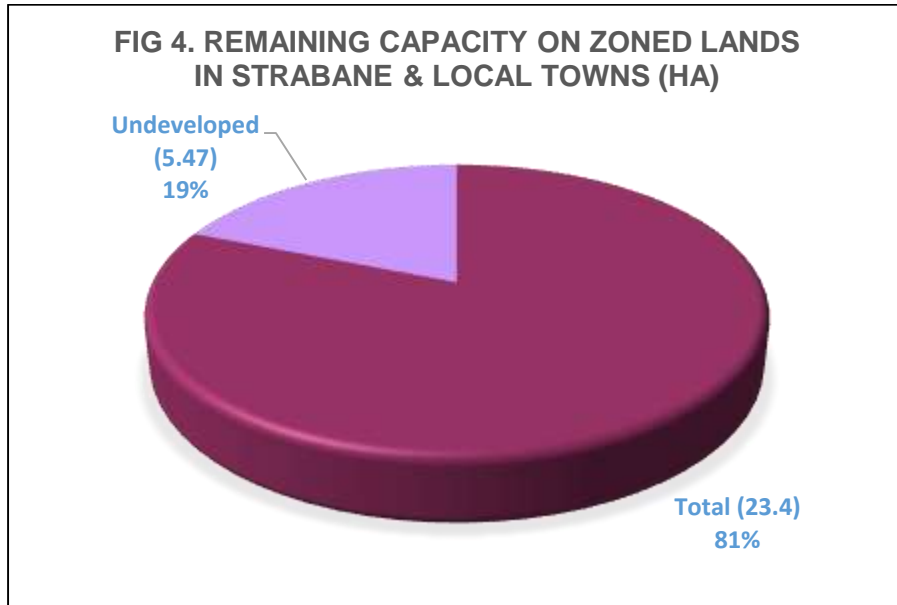
- 5.1 In terms of remaining capacity in Derry, **152.5 ha** remains undeveloped which equates to 42% of the total zoned land supply.



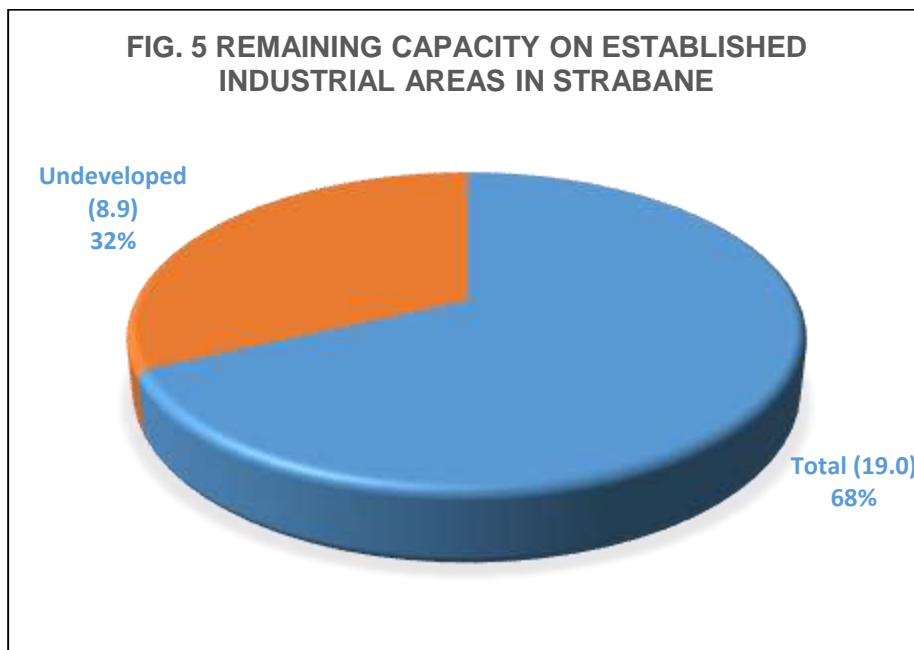
- 5.2 With established / existing areas, **183 .52 ha** (27%) of the 501.15 ha remains

### Strabane Area Plan 2001

- 5.4 Zonings in Strabane have performed proportionately better with only **5.47 ha** (19%) of 23 ha remaining undeveloped.

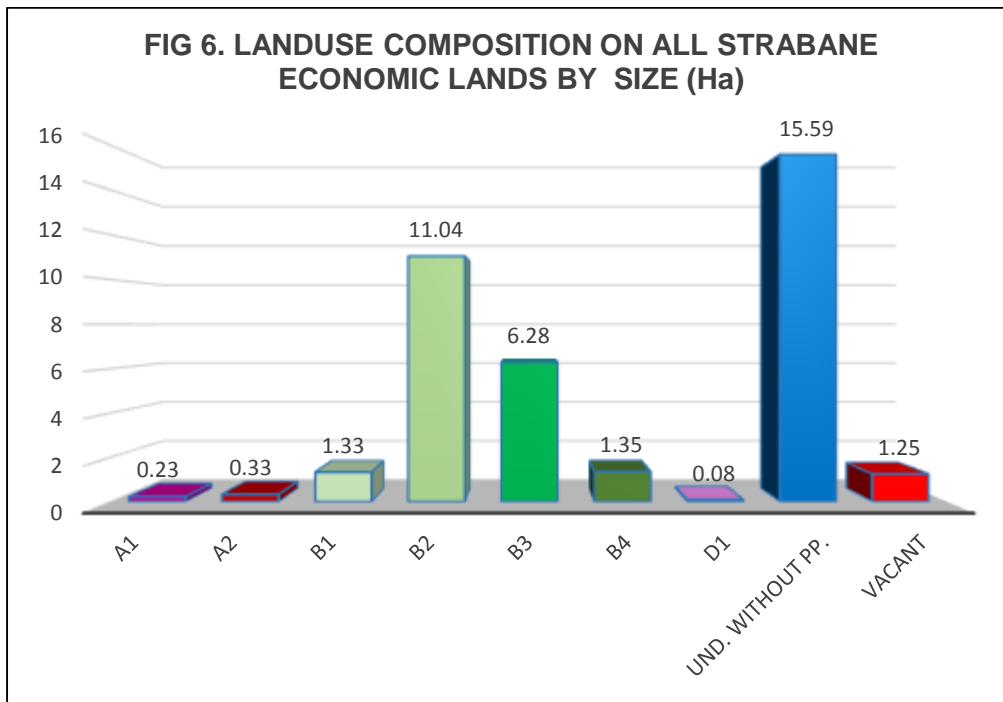


- 5.5 Established economic areas have performed well with **8.9 ha** (32%) of the estimated 19 hectares remaining undeveloped.



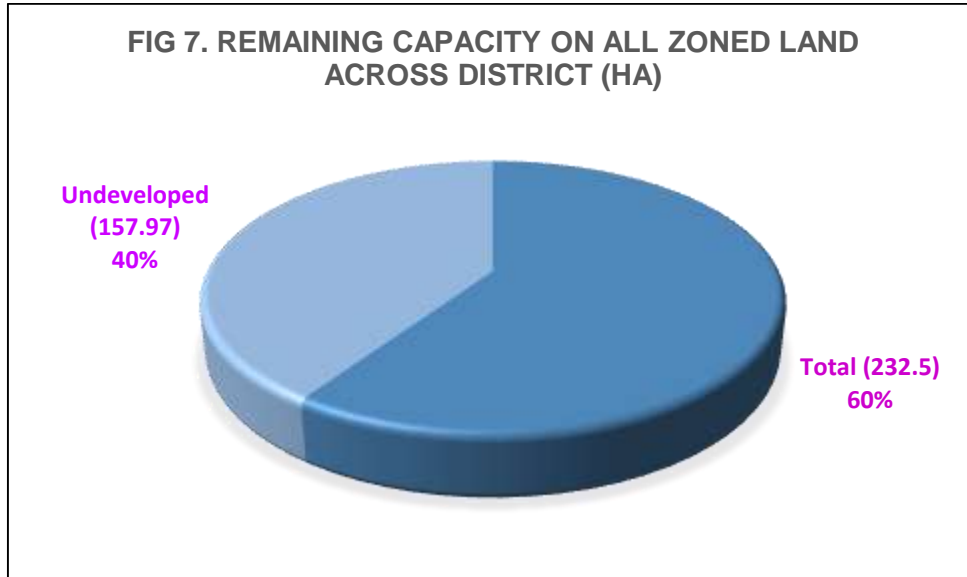


5.6 Proportionately, economic lands in Strabane perform well in relation to conforming uses such as B1, B2, B3 and B4 uses when compared to Derry.

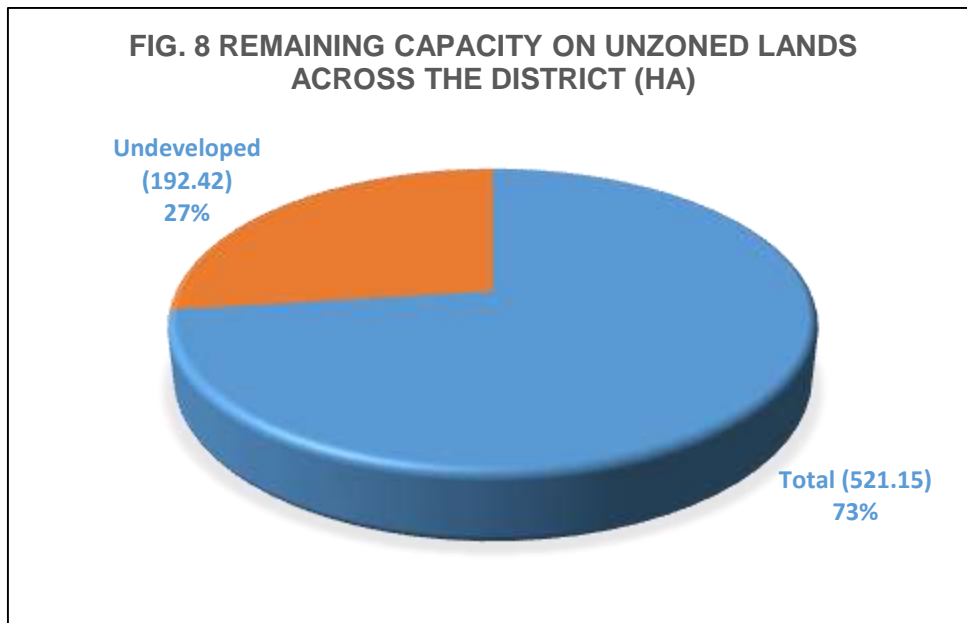


### Derry City and Strabane District Council Area – Collective Findings

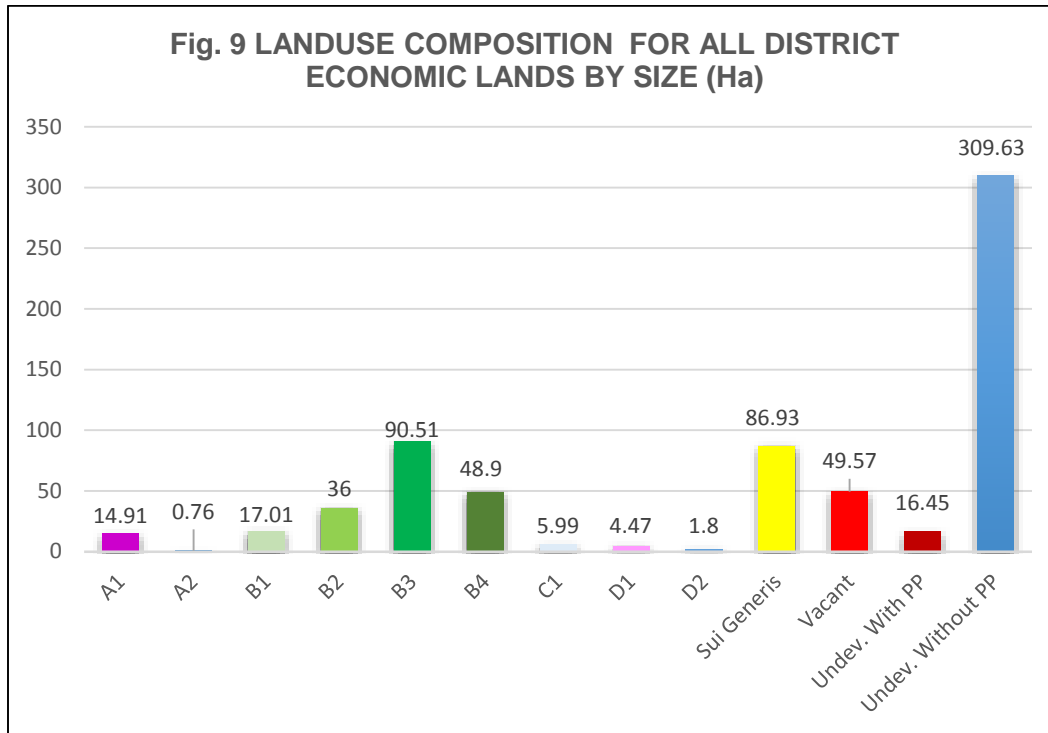
5.7 On a district wide basis, almost **158 ha** (40%) of all zoned lands remains undeveloped.



5.8 Approximately **192 ha** of land remains undeveloped in established/existing industrial areas, equating to 27% of the total lands supply.



5.9 The District wide land use composition paints a similar story to that of the former Derry District, which is to be expected given the vast majority of land is located in around the largest settlement, Derry.



## 6.0 Conclusion

- 6.1 The 2017 survey findings show only marginal change in the uptake of land in both the former Derry and Strabane District Council Areas since 2011 and 2013.
- 6.2 There is approximately 2.2 hectares of vacant land in Ballycolman and Dublin Road Industrial Estates with 8.9 hectares of undeveloped land at the new Invest NI Strabane Business Park underlining of the lack of large scale inward investment into the Council area. The survey illustrates how the economic base is largely supported by small and micro businesses, which is illustrated as they are dominant feature within most of the zoned / unzoned areas.
- 6.3 In the former Derry District, approximately 152.5 hectares of the 209.1 hectares (73%) zoned remain undeveloped. In contrast, of the 15 hectares zoned in Strabane town, less than 1 hectares remain undeveloped. Around 5 hectares of zoned industrial land remains 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 and farm shop at Maydown. Additionally, there was also evidence of A2 office uses appearing in these employment areas which are more suited to town centre locations.

### Potential Implications for LDP

- 6.5 As it currently stands, the majority of zoned 'industrial' land in Derry is peripherally located away from population centres with poor transport linkages and placing a greater reliance on the private car. The preferred option, may involve a re-evaluation of non-performing/undeveloped sites with a view to de-zoning or re-zoning. There will also emphasis identifying alternative sites within the District, which can meet the envisaged needs of growth area in economic development. Growth areas, identified in our 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 a variety of transport modes. We 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 a role to play in the evolving manner of the economy. For example some the 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. The existing zonings can also cater for small and medium businesses that do not require to be centrally located.

- 6.7 Many of the zoned and existing economic areas are well located to take advantage of existing transport links such the Foyle Port, the A2, A5 and A6. 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.
- 6.8 While the importance of employment and job creation are keys themes of the Community Plan, the LDP needs to balance this with the long-term wellbeing of residents who co-exist alongside some of the traditional heavy and ‘dirty’ industries such as Londonderry 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 nearby residents to poor air quality, night-time noise, light pollution etc. The LDP will consider policies which mitigate against potential amenity impacts and will also look at measures within undeveloped zoned or economic land, such as identifying favourable uses near residential or environmental receptors.
- 6.9 In general it is accepted from the findings of the monitor that we have an excess of economic 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 monitored in the future, either as a standalone office monitor or as part of the economic land monitor.

## 7.0 Appendix 1

- 7.1 Overview the Planning (Use Classes) Order (Northern Ireland) 2015, setting out Sui Generis Uses and Use Classes. This is included as a reference point and should not be considered as a substitute for the Order itself, which can be accessed at <http://www.legislation.gov.uk/nisr/2015/40/made>.

<b>SUI GENERIS USE</b>
<p>No class specified in the Schedule includes use—</p> <ul style="list-style-type: none"><li>(a) as an amusement arcade or centre, or a funfair;</li><li>(b) as a betting office;</li><li>(c) for the purposes of a funeral undertaker;</li><li>(d) as a hostel where a significant element of care is provided;</li><li>(e) as a hotel;</li><li>(f) as a house in multiple occupation;</li><li>(g) for the sale of fuel for motor vehicles;</li><li>(h) for the sale or display for sale of motor vehicles;</li><li>(i) for the sale of food or drink for consumption on the premises or of hot food for consumption off the premises;</li><li>(j) as a scrapyards, or a yard for the storage or distribution of minerals or the breaking of motor vehicles;</li><li>(k) as a swimming bath, skating rink, gymnasium or area for other indoor or outdoor sports or recreations including those involving motorised vehicles or firearms;</li><li>(l) for a taxi business or business for the hire of motor vehicles;</li><li>(m) for or in connection with public worship or religious instruction;</li><li>(n) for the carrying out of any prescribed process which requires an authorisation under Article 6 of the Industrial Pollution Control (Northern Ireland) Order 1997(7) or for the operation of any installation or mobile plant which requires a permit under regulation 9 of the Pollution Prevention and Control (Industrial Emissions) Regulations (Northern Ireland) 2013(8);</li></ul>

(o) as a waste management facility for the collection, transport, treatment, recovery, recycling, transfer and disposal of waste (as defined in Council Directive [2008/98/EC](#))(9).

## **PART A SHOPPING AND FINANCIAL & PROFESSIONAL SERVICES**

### **Class A1: Shops**

Use for all or any of the following purposes—

- (a) for the retail sale of goods other than hot food;
- (b) as a post office;
- (c) for the sale of tickets or as a travel agency;
- (d) for hairdressing;
- (e) for the display of goods for retail sale;
- (f) for the hiring out of domestic or personal goods or articles; or
- (g) for the reception of goods including clothes or fabrics to be washed, cleaned or repaired either on or off the premises

where the sale, display or service is to visiting members of the public.

### **Class A2: Financial, Professional and Other Services**

Use for the provision of services which it is appropriate to provide in a shopping area, where the services are provided principally to visiting members of the public including—

- (a) financial services; or
- (b) professional services.



## **PART B INDUSTRIAL AND BUSINESS USES**

### **Class B1: Business**

Use—

- (a) as an office other than a use within Class A2 (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 or distribution**

Use for storage or as a distribution centre.

## **PART C RESIDENTIAL USES**

### **Class C1: Dwellinghouses**

Use as a dwellinghouse (whether or not as sole or main residence)—

- (a) by a single person or by people living together as a family; or
- (b) by not more than 6 residents living together as a single household where care is provided for residents.

**Class C2: Guest houses**

Use as a boarding or guest house or as a hostel where, in each case, no significant element of care is provided.

**Class C3: Residential institutions**

Use—

- (a) for the provision of residential accommodation and care to people in need of care (other than a use within Class C1 (Dwellinghouses));
- (b) as a hospital or nursing home; or
- (c) as a residential school, college or training centre.

**Class C4: Secure residential institutions**

Use for the provision of secure residential accommodation, including use as a prison, young offenders centre, detention centre, juvenile justice centre, short term holding centre, secure hospital, or use as a military barracks.

**PART D COMMUNITY, RECREATION AND CULTURE**

**Class D1: Community and Cultural Uses**

Any use (not including a residential use)—

- (a) for the provision of any medical or health services except the use of premises attached to the residence of the consultant or practitioner;
- (b) as a crèche, day nursery, after school facility or day centre;
- (c) as a community centre;
- (d) for the provision of education;
- (e) for the display of works of art (otherwise than for sale or hire);
- (f) as a museum;
- (g) as a public library or reading room;
- (h) as a public hall or exhibition hall; or

(i) as a law court.

**Class D2: Assembly and leisure**

Use as a—

(a) bingo hall;

(b) cinema;

(c) concert hall;

(d) dance hall;

(e) theatre.