



Comhairle Ceantair
**an Iúir, Mhúrn
agus an Dúin**

**Newry, Mourne
and Down**
District Council

**Local Development Plan
Preparatory Studies**

Paper 3: Employment and Economic Development

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Purpose

The purpose of this paper is to provide members with an overview of the employment and economic development base in the Council area and to consider the land requirements for economic development uses up to 2030.

Content

The paper provides:-

- the regional policy context for formulating Local Development Plan policies for economic development;
- a socio-economic profile of Newry, Mourne and Down District;
- a brief overview of tourism and land use planning;
- an overview of existing provision and uptake of zoned economic development land in the Banbridge/Newry & Mourne and Ards & Down Area Plans;
- an assessment of the number of new jobs required and how this can be translated into future economic land requirements; and
- a summary of key findings.

1.0 Introduction

1.1 The purpose of this paper is to inform members of the current provision of employment/economic development land within the Council area and to consider how this land could be distributed in the future. It sets out the regional context for economic development, the supply of industrial zoned land and extent of past take up, and examines the employment and economic base of the new Council area. It provides an indication of how many jobs are required to both cater for a growing population and to address issues such as unemployment and deprivation; and how these jobs can be accommodated across employment sectors and translated into a need for additional employment land up to 2030 is also considered. The paper allows members to commence consideration of how economic policy may be formulated within the context of the Regional Development Strategy 2035 (RDS) and the Strategic Planning Policy Statement (SPPS).

2.0 Regional and Local Policy Context

2.1 The Regional Policy Context is provided by the NI Executive's Economic Strategy and Sustainable Development Strategy; the Department for Regional Development's Regional Development Strategy 2035 (RDS) and the Department of the Environment's regional Planning Policy Statements (PPSs). A summary of these documents as they pertain to plan making and economic development policy is provided in the following sections.

(a) The Northern Ireland Executive Economic Strategy: Priorities for Sustainable Growth and Prosperity

2.2 The NI Executive Economic Strategy was published by the Department for Enterprise, Trade and Investment in March 2012. The overarching goal of the Strategy is to improve the economic competitiveness of the NI economy by creating a larger more export driven private sector. In order to achieve this the Executive plans to:

- stimulate innovation, research and development, and creativity to widen and deepen our export base;
- improve the skills and employability of the entire workforce;
- encourage business growth and increase the potential of our local companies, including social and rural economies; and
- establishing a modern and sustainable economic infrastructure that supports economic growth.

(b) Regional Development Strategy 2035 (RDS)

2.3 The RDS provides a framework for strong sustainable economic growth across the region and recognises that a growing regional economy needs a co-ordinated approach to the provision of services, jobs and infrastructure. It provides Regional Guidance to ensure an adequate supply of land to facilitate sustainable economic growth (RG 1). Land should be accessible and located to make the best use of available services, for example water and sewerage infrastructure, whilst avoiding, where possible, areas at risk of flooding from rivers, the sea or surface water run-off.

2.4 The RDS notes that a system to monitor the take-up (and loss) of employment land is required to help inform planning and investment decisions and actions. It therefore provides an Employment Land Evaluation Framework (see Appendix A) to identify robust and defensible portfolios of both strategic and locally important employment sites in Local Development Plans. This means protecting zoned land in development plans and, in order to capitalise on the development opportunity provided by a concentration of people, goods, available infrastructure and business, promoting economic development opportunities in the hubs¹ (SFG11). It also recognises the importance of sustaining rural communities by facilitating rural industries, business and enterprises in appropriate locations. This means not only businesses connected to farming, forestry and fishing but other industries such as tourism and renewable energy which can provide further jobs and opportunities in rural areas as long as they are integrated appropriately within a rural landscape.

2.5 The RDS advocates that land zoned for economic use in Development Plans should be protected as it provides a valuable resource for local and external investment. This should ensure that a variety of suitable sites exist to provide adequate and continuous supply of land for economic development.

(c) Regional Planning Policy Statements

PPS4 Planning and Economic Development

2.6 The RDS is complemented by the Department of the Environment's Planning Policy Statements (PPSs), the most relevant of which is PPS 4: Planning and Economic Development which sets out the Department's planning policies for economic development uses and indicates how growth associated with such uses can be accommodated and promoted in development plans. Economic development uses comprise industrial, business and storage and distribution uses, as currently defined in Part B 'Industrial and Business Uses' of the Planning (Use Classes) Order (Northern Ireland) 2015.

¹ The RDS Spatial Framework identifies hubs and clusters of hubs, these consist of the main and local towns located on the Regional Strategic Transport Network, which play a strategic role as centres of employment and services for both urban and rural communities.

Strategic Planning Policy Statement (SPPS)

2.7 The Department of the Environment's Strategic Planning Policy Statement (SPPS), will eventually replace existing PPSs, however until such time as the Council has its local plan strategy adopted the Council will continue to apply the retained PPSs.² A draft SPPS was issued for public consultation in February 2014 and has now been published in its final form (September 2015). The SPPS does not introduce any significant changes to economic development policy but helps to shorten and simplify the guidance for Councils. Both PPS4 and the SPPS set regional policy objectives for economic development which are to:

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

2.8 The SPPS reiterates the role for LDPs to ensure that there is an ample supply of suitable land available to meet economic development needs. LDP's should 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 development. Account should also be taken of factors such as accessibility by all members of the community, connectivity with the transportation system (particularly public transport), availability of adequate infrastructure, specialised needs of specific economic activities, potential environmental impacts, and compatibility with nearby uses. LDPs should seek to identify previously developed land for economic development, to assist in reducing the need for green field development. A system to monitor the take up and loss of land allocated for economic development purposes should also be put in place so that any shortfalls can be identified.

2.9 The SPPS also expresses the need, in the interests of rural amenity and wider sustainability objectives, to restrict the level of new building for economic development purposes outside settlements. Exceptions may include where a suitable site cannot be found within a settlement for a small scale project, or where the proposal is for a major industrial development and a countryside location is necessary due to its size or site requirements.

² Transitional arrangements as set out in the SPPS

2.10 The SPPS recognises the need to support and sustain vibrant rural communities consistent with the RDS and to strike a balance between facilitating new development and protecting the environment from inappropriate development. Farm diversification, the re-use of rural buildings and appropriate redevelopment and expansion proposals for industrial and business purposes will normally offer the greatest scope for sustainable economic development in the countryside. Such proposals may occasionally involve the construction of new buildings, where they can be integrated in a satisfactory manner.

2.11 Tourism also makes an important contribution to the Northern Ireland economy in terms of the revenues it generates and the employment opportunities it provides. The aim of the SPPS in relation to tourism development is to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environments. Tourism will be examined in a further preparatory paper to be prepared by the plan team and presented to Council. Town centres also provide employment and a new strategic policy for town centres and retailing is contained in the SPPS. The role of town centres will be explored in the next paper.

(d) NMD District Council Corporate Plan 2015-19

2.12 Under the Council's Corporate Plan a strategic objective is to attract investment and support the creation of new jobs. One of the associated key actions is to prioritise infrastructure development and economic regeneration as part of the new Local Development Plan.

2.13 The Plan highlights that the District ranks third, amongst all 11 councils, in terms of the percentage of the workforce who are self-employed. This demonstrates the entrepreneurial nature of the District and the need for the LDP to consider how the land use requirements of small business operators throughout the Council area could be addressed.

2.14 The challenge under the Corporate Plan is therefore to secure greater private and public investment into the Council District as a means of supporting employment opportunities for all. The new LDP has a critical role to play in this regard ensuring that policies and proposals within the plan provide land use opportunities that are aligned to the Districts business needs.

(e) NMD Economic Regeneration and Investment Strategy 2015 – 2020

2.15 The Council's Strategy guides 'what and 'how' it delivers on the vision of

"Newry, Mourne and Down a vibrant, dynamic and connected region for investment, tourism and culture"

2.16 The Strategy highlights what it terms key messages and a number of these have land use planning implications:

- A potential cut in Corporation Tax from April 2017, which presents a significant opportunity for Newry, Mourne and Down to compete with the Republic of Ireland;
- Additional locational advantages of Newry, Mourne and Down;
 - Newry functioning as a Gateway between NI and the Republic of Ireland as well as its position along the Belfast-Dublin Economic Corridor;
 - Downpatrick's location within the Belfast Metropolitan Area Catchment Area;
 - tourism assets with its three Areas of Outstanding Natural Beauty (AONB);
 - road and rail network;
 - strategic importance of Warrenpoint Port; and
 - the growth potential of the area through its four Hubs and Clusters.

2.17 Within the Strategy five strategic themes address Economic Development, Tourism, Urban and Rural Development, and Regeneration, together with Culture and the Arts.

2.18 The Economic Development theme is of particular relevance to this paper and in particular the strategic priority of the Council to establish effective and business friendly approaches to the planning process. One of the associated actions under this strategic priority is to review land use and infrastructure development to inform the Local Development Plan. This paper represents the first stage in a review of the provision of economic development lands across the District and will examine both the level of provision of zoned economic land as well as its distribution across the Council area.

3.0 A Socio-Economic Profile of Newry, Mourne and Down

3.1 This section provides an overview of the employment and economic base of the Newry, Mourne and Down council area within the context of the Northern Ireland economy, and examines employment sectors, unemployment and economic activity rates.

Overview of Northern Ireland Economy

3.2 It is a widespread view that Northern Ireland has suffered from the recession to a greater extent than any other UK region. Recovery in the labour market has been slow and employment is not expected to recover to its pre-recession peak until well beyond 2023³. Similar to trends in the UK overall, manufacturing employment is expected to continue declining with a shift towards more exportable service sectors such as administrative and professional services, software and ICT, scientific/technical and retail to drive job creation. The Knowledge Economy⁴ is an important and growing component of the local economy and increased output with less employment reflects the changing role of manufacturing. The Knowledge Economy includes a broad range of sectors including:

- IT services and telecommunications;
- Creative content and digital media;
- Computing and advanced electronics;
- Software and digital content;
- Pharmaceuticals, biotechnology and medical services; and
- Aerospace and other transport equipment.⁵

Other growth areas include environmentally sustainable products including recycling activities and those linked to renewable energy; and the agri-food sector.

3.3 A feature of Northern Ireland is its consistently high rate of economic inactivity in comparison with other regions of the UK. Economic inactivity rates, currently 27% of the working age population compared to the UK average of 22.2%, have remained within a stable range of 26% and 32% of the working adult population in Northern Ireland since the mid 1980s. The NI Executive intends to address the issue through a range of new measures designed to help individuals in targeted inactive groups make the transition into work. The strategic goal is by 2030 to contribute towards a stable and competitive employment rate in NI which exceeds the UK average through a reduction in the proportion of the working age population

³ Oxford Economics. Northern Ireland Economy in Transition: Future Drivers, Challenges, Impacts and issues for Policy Consideration.

⁴ The Oxford Dictionary defines the 'knowledge economy' as an economy in which growth is dependant on the quantity, quality and accessibility of the information available, rather than the means of production.

⁵ Northern Ireland Centre for Economic Policy (NICEP), Outlook:Spring 2014

(16-64) classified as economically inactive. Factors identified within Enabling Success - A strategy to tackle economic inactivity in NI (2015) – as affecting employability at local level are local labour market demand, quality of jobs available (pay and flexibility), access barriers, transport isolation (rural), transport deprivation(urban), and childcare/social care provision⁶.

Services sector in Northern Ireland

3.4 Northern Ireland had a much lower reliance on Service industries (as a proportion of businesses) than the UK as a whole with the Services sector making up around 54% of Northern Ireland headquartered businesses yet accounting for approximately 75% of all UK businesses⁷. This was primarily due to lower proportions of businesses in the Information and Communication sector (2.1% in NI, 7.6% in UK), and the Professional, Scientific & Technical sector (7.3% in NI, 16.9% in UK)

Small Business Economy

3.5 The figures show that in terms of both turnover and number of employees Northern Ireland is a small business economy. Almost half (47.1%) of businesses with their main headquartered (or registered) address in Northern Ireland had a total turnover of less than £100,000, with only 8.8% having a total turnover exceeding £1 million. Businesses with total employment of less than 50 people accounted for around 98% of VAT and/or PAYE registered businesses headquartered in Northern Ireland. Businesses with total employment of less than 10 accounted for around 89%.

The Existing Employment Base in Newry, Mourne and Down

3.6 In order to assess the provision of economic development over the plan period it is necessary to consider the present picture of business and the labour market across the district. In examining the situation reference is made to the regional situation for the purpose of comparison and providing a context.

3.7 Firstly the nature of industry and employment in the Newry, Mourne and Down Council area is examined in terms of broad employment sector, main employers and size of businesses. The labour market is examined in terms of number of economically active population that are in employment and those claiming benefits. Finally there is consideration of the skills and qualifications within the resident population and how it relates to the type of employment that will drive the future economy.

3.8 Employment may be classified into three sectors: primary, secondary and tertiary. The primary sector includes agriculture, forestry and the extraction of

⁶ Enabling Success – Supporting the transition from economic inactivity to employment. A strategy to tackle economic inactivity in Northern Ireland. DELNI and DETI (April 2015).

⁷ Source: http://www.detini.gov.uk/facts_and_figures_edition_16_-_2.pdf?rev=0

natural resources whereas the secondary sector is concerned with manufacturing and processing of natural resources. The tertiary sector is primarily concerned with service provision such as public administration, education, health, retailing, banking, catering, transportation and communications.

3.9 In the period 2001 to 2011, the employment sector pattern of the two former District Council areas generally reflected the Northern Ireland trend of a fall in the primary sector and an increase in the tertiary sector (Table 1 and Figure 1). Both Newry & Mourne, and Down have a higher percentage of employment in the primary sector compared to the regional average. DARD statistics for 2013 indicate that Newry and Mourne had the second largest agricultural labour force in Northern Ireland (4,174), representing 8.73% of the total NI agricultural labour force, whilst Down (2,316) accounts for 4.84%.

3.10 The fishing industry plays an important role in the local economies within the Council area with fleets and associated processing facilities based in Kilkeel and Ardglass. The total value of fish landed in NI in 2013 amounted to £23.2 million with combined catches from Kilkeel and Ardglass contributing £14.6 million. Shellfish make up the most significant part of the overall catch amounting to £18.7 million or 81% of the total catch. In 2013 49% of fishermen in the Northern Ireland fishing industry were based in Kilkeel, with a further 15% based in Ardglass.⁸ Both Carlingford Lough and Strangford Lough have seen the development of aquaculture in recent years. A mussel depuration facility is in operation at Warrenpoint Harbour together with berthing and loading facilities to serve the shellfish industry within Carlingford Lough.

3.11 The percentage of people in Newry, Mourne and Down working in the mining and quarrying industry (0.48%) is only slightly above the regional average (0.25%). All supplies of sand and gravel in the area originate from superficial deposits along the coastal lowlands south of the Mourne Mountains.

3.12 Changes in farming and fisheries industries suggest that employment in the primary sector is likely to continue to decline, resulting in a greater number of people looking for employment in the secondary and tertiary sectors.

Table 1: Newry, Mourne & Down Employment by Sector in 2011.

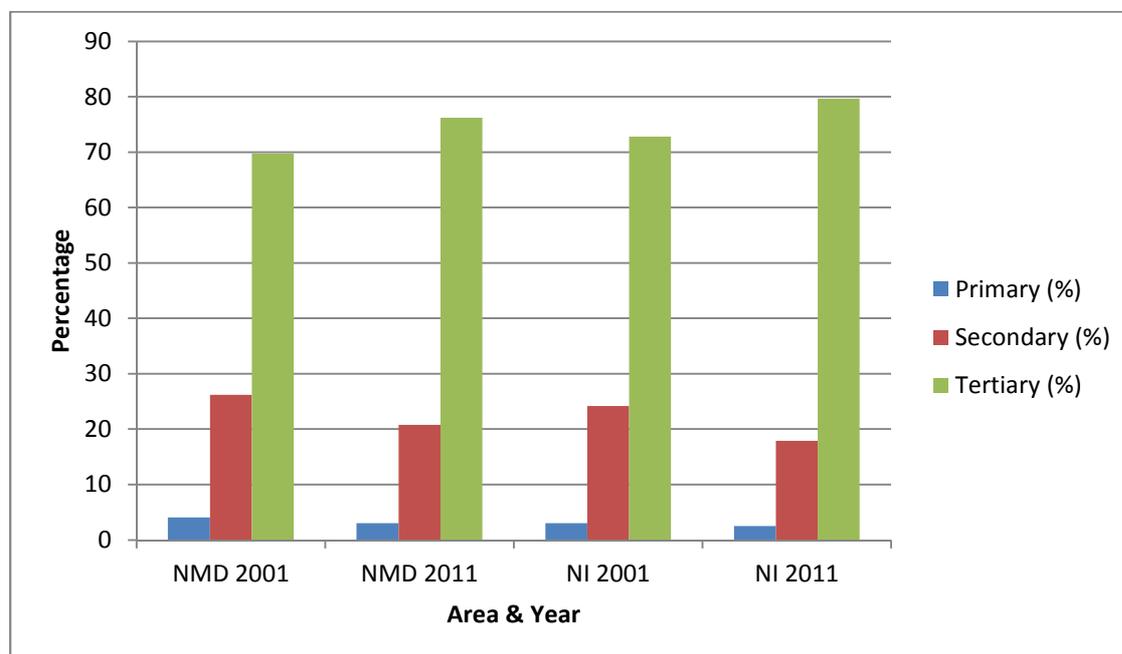
Sector	Newry & Mourne	Down	NMD*	NI
Primary	1,397 (3.37%)	835 (2.70%)	2,232 (3.0%)	19794 (2.49%)
Secondary	9,931 (23.95%)	5,433 (17.58%)	15,364 (20.76%)	142131 (17.87%)
Tertiary	30,135 (72.68%)	24,642 (79.72%)	54,777 (76.2%)	633338 (79.64%)
Total (P,S,& T)	41,463	30,910	72,373	795,263

Source: NISRA 2001 Industry of Employment: KS11A (administrative geographies) and 2011 Industry of Employment: KS605NI (administrative geographies)

⁸ UK Sea Fisheries Annual Statistics Report 2013

* NMD is a basic total of 2 x 2011 and percentage average of LGD figures.

Figure 1: Illustration of Employment Sectors in NI and NMD in 2001 & 2011



Source: NISRA Census 2001 & 2011

* NMD is a total of 2 x 2001 & 2011 LGD figures.

3.13 Overall, Newry and Mourne District had a spread of jobs across the three sectors broadly in line with the whole region albeit with a higher proportion of jobs within the secondary sector. The spread across Down mirrors the NI figures for all three sectors.

3.14 Newry and Mourne District stands out as having a high percentage of jobs in manufacturing (15.43%) and construction (6.23%) than the NI average of 10.9% and 4.25% respectively. This can be attributed to companies such as Glen Electric, SCA Packaging, MJM Marine, FM Environmental and Haldane Fisher. Down District has lower proportions of jobs in manufacturing and construction than Newry and Mourne but has the highest level of services at 87.31% compared to Newry and Mourne District at 75.71%.

3.15 The recent growth in Northern Ireland in office type industries, such as information technology and financial services, points to a need for a more flexible approach when determining the types of economic development that are acceptable in particular locations and that land zoned for economic development should be seen as supporting a whole range of uses - apart from retailing - and not just the traditional manufacturing sector.

3.16 Key industries in Newry now include the manufacture of pharmaceuticals (Norbrook), IT infrastructure (First Derivatives), and household and commercial

electrical appliances (Glen Electric). Call centre employment (Teleperformance) is also a significant contributor to the Newry economy. Aircraft seating manufacturing in Kilkeel (BE Aerospace) has seen growth in recent years and has helped to sustain employment in an area traditionally reliant on the fishing industry. The Tourism industry also contributes to the local economy in Newry, Mourne and Down supporting 4,780 jobs across the District in 2013⁹. Recently published tourism figures indicates that the District attracted 571,000 overnight visitors in 2014 with an estimated spend of £54 million¹⁰ Newry, Mourne and Down attracts the third highest number of overnight trips, after Belfast and Causeway Coast, of all the NI local government districts.

Business Stock

3.17 In terms of business stock, as of 2014 there were 7,500 active VAT/PAYE registered businesses in the Newry, Mourne and Down council area (11.07% of the Northern Ireland total of 67,710). Of this number, 27% are in the agricultural, forestry and fishing sectors, the 6th highest proportion of the 11 new council areas and above the regional average of 25% (DETI). This is reflective of the large rural areas within the new council area. When the production, construction and wholesale & retail sectors are included, the total percentage is over 64%. The majority of businesses are classified as being micro, employing less than 5 people (79%) compared to the regional average 75.6%. This illustrates the importance of small businesses and the self-employed in the local economy. However within Newry, Mourne and Down, there is a lower incidence of registrations in the service (tertiary) sector such as finance and insurance, professional and scientific, and ICT than the NI average. The number of VAT and/or PAYE registered businesses in Newry and Mourne fell from a peak of 4,880 in 2008 to 4,605 in 2014. The figures for Down follow a similar pattern falling from a high of 3,005 in 2008 to 2,705 in 2013. It is positive to consider that the figures have started to rise again in Down with 25 more businesses being registered in the period 2013-2014¹¹. It is also noted that there has been a higher rate of business deaths in both former districts compared to business births post-2008.¹²

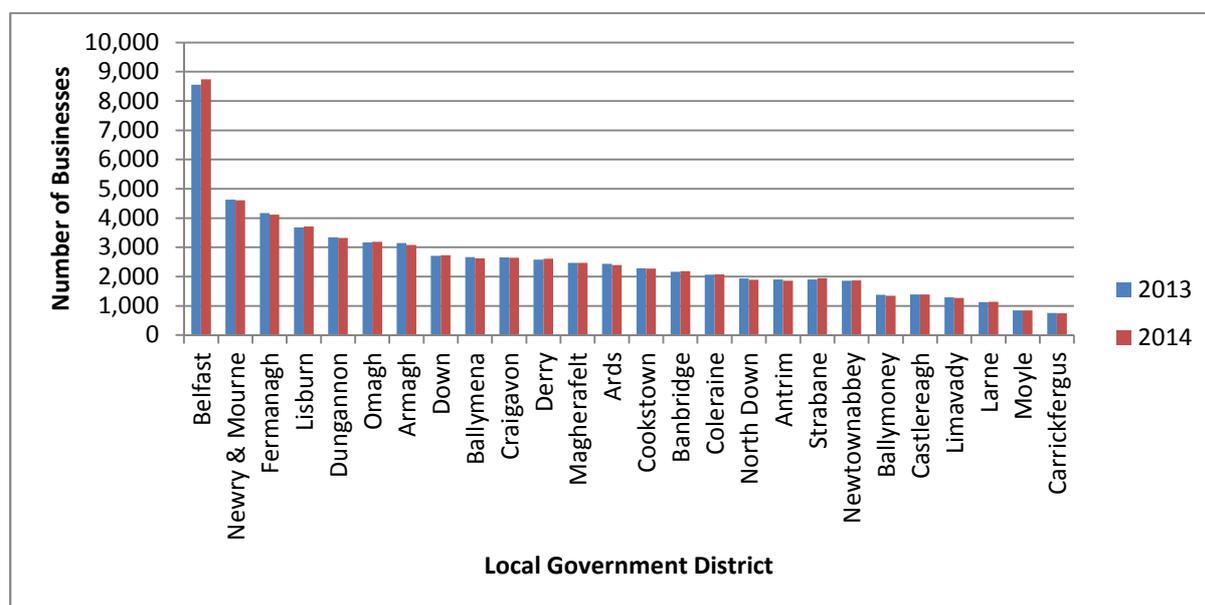
⁹ NISRA Census of Employment September 2013.

¹⁰ NISRA Northern Ireland Local Government District Tourism Statistics 2014 (published 30 July 2015).

¹¹ Inter Departmental Business Register (IDBR) – Edition 17 4th Feb 2015

¹² DETI, Business Demography 2013

Figure 2: No. of VAT and or PAYE registered Businesses Operating in Northern Ireland by LGD 2014



Source: Inter Departmental Business Register (IDBR) March 2013-2014

Economic Activity

3.18 The economically active are defined as those aged 16-74¹³ who are either in employment (full time or part time) as an employee or self employed or those actively seeking work.

3.19 The number and percentage of economically active persons in Newry, Mourne and Down has steadily increased between 1981 and 2011. Newry and Mourne has been well below the NI average levels of economic activity for 1981, 1991 and 2001 however in 2011 the gap has been significantly reduced (See Table 2). These economic activity level figures are crude and do not factor in the average wage levels or the breakdown of part-time workers. Much of this growth is as a result of increasing numbers of women entering the job market (Table 3). Research by DETI (2014) confirms that 47% of those aged 16-64¹⁴ currently in employment in Northern Ireland are women and female employment has continued to rise over the last 20 years compared with a fall for males.¹⁵ If these trends continue, more women are likely to enter the employment market over the plan period.

¹³ NISRA Census Definitions and Output Classifications 2011

¹⁴ DETI (NI) Quarterly Labour Market Report uses the 16-64 age group and therefore differs from the economically active 16-74 age group contained in census.

¹⁵ http://www.detini.gov.uk/women_in_northern_ireland_2014.pdf?rev=0

Table 2: NI & NMD Economic Activity Levels – 1981 to 2011

	1981		1991		2001		2011	
	Number	(%)	Number	(%)	Number	(%)	Number	(%)
NI	629,759	59	682,020	58	739,134	62	869,767	66.22
NMDC	26,859	55	32,766	56	34,826	58	46,207	65.49
DDC	21,858	59	24,888	59	28,630	64.71	33,648	67.11
NMD*	48,717	57	57,654	57.50	63,456	61.35	79,855	66.30

Source: NISRA/1981, 1991, 2001 & 2011 Census Reports

* NMD is a basic total of the two LGD figures and the percentage an average of the two districts.

Table 3: Economic Activity of the Population (16-74 year old) – 2011

	All Usual residents	Economically Active: Total	Employee Part-time	Employee Full-time	Self Employed	Economically Active: Unemployed	Economically Active: Full-time student
NI	1,313,420	869,767	172,138	467,805	116,666	65,196	47,962
	100%	66.22%	13.11%	35.62%	8.88%	4.96%	3.65%
NMDC	70,560	46,207	9,168	22,535	7,882	4,315	2,307
	100%	65.49%	12.99%	31.94%	11.17%	6.12%	3.27%
DDC	50,138	33,648	6,561	17,157	5,799	2,451	1,680
	100%	67.11%	13.09%	34.22%	11.57%	4.89%	3.35%
NMD*	120,698	79,855	15,729	39,692	13,681	6,766	3,987
	100%	66.30%	13.04%	33.08%	11.37%	5.50%	3.31%

Source: NISRA Census 2011 Economic Activity: KS601NI (administrative geographies)

* NMD is a basic total of the two LGD figures and the percentage an average of the two districts.

3.20 There is a higher proportion of people in self employment than there is for Northern Ireland generally, around 11.37% for Newry, Mourne and Down and around 8.88% for Northern Ireland. The area has the second highest share of self employed in the economically active population across the 11 councils¹⁶. This is indicative of the strong entrepreneurial spirit in the area.

3.21 In Northern Ireland, a total of 402,000 women were economically active in April - June 2014 – an increase of 12,000 during the last year. The female working age economic activity rate here of 66.8% was 5.6 percentage points lower than that in GB (72.4%). At 66.8% the working age economic activity rate for females was 12.9 percentage points lower than that for NI males (79.8%). The difference in economic activity rate between males and females is less than that of five years ago when the difference was 13.5 percentage points. In terms of the employment makeup of the two genders, almost 48% of females in Newry, Mourne and Down work in the public sector areas of administration, education and health with a further 20% of females working in retail. In contrast, over 30% of males in Newry, Mourne and Down are employed in the manufacturing and construction industries with a

¹⁶ Based on the combined NMC and DDC figures

further 23% working in retail. Approximately 51% (14,481) of women in Newry, Mourne and Down are in part-time jobs compared to approximately 21% (4,968) of men¹⁷. The predominance of females in part-time work is reflected in the 2013 gross average weekly wage for the two districts where women were paid a lower average gross weekly wage to men. Newry and Mourne: £304.2 vs £503.8, and Down: £296.1 vs £503.8¹⁸.

Table 4: Proportion of Economically Active Males and Females (1991, 2001 & 2011)

	1991		2001		2011	
	Male	Female	Male	Female	Male	Female
NI	406,726 (60%)	275,294 (40%)	398,384 (64%)	231,375 (36%)	460,797 (53%)	408,955 (47%)
NMC	20,806 (63%)	11,960 (37%)	17,959 (58%)	13,008 (42%)	25,309 (55%)	20,898 (45%)
DDC	15,011 (60%)	9,877 (40%)	14,648 (56%)	11,405 (44%)	17,787 (53%)	15,861 (47%)
NMD	35,817 (62%)	21,837 (38%)	32,607 (57%)	24,413 (43)	43,096 (54%)	36,759 (46%)

Source: NISRA/1991, 2001 & 2011 Census Reports

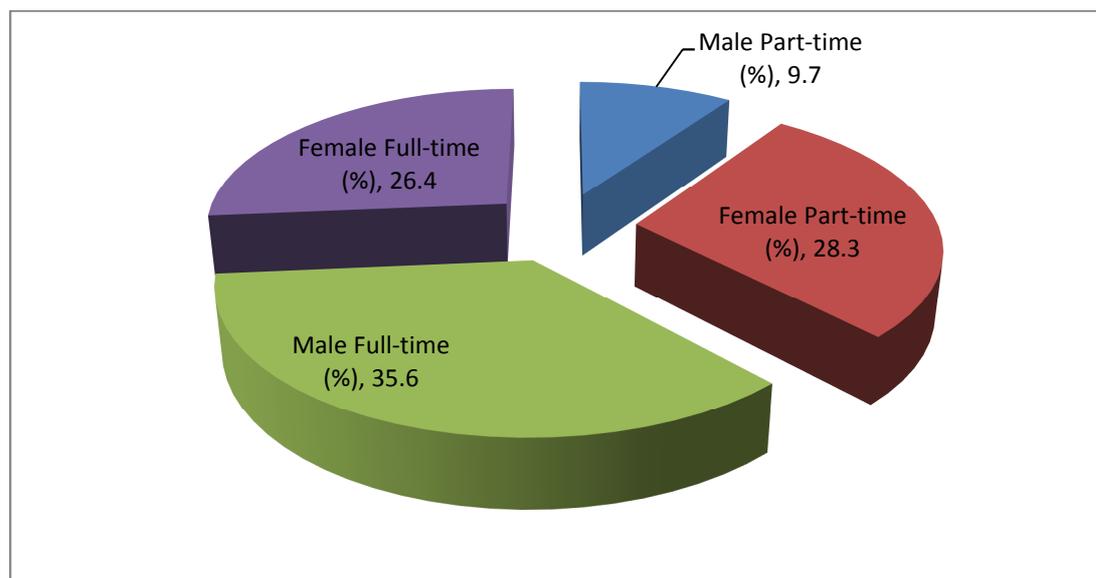
* NMD is a basic total of the two LGD figures and the percentage an average of the two districts.

3.22 A significant risk to employment levels in Newry, Mourne and Down is the high proportion of female employment currently in the public sector. The NI Executive has made it clear that the significant cuts to Departmental budgets will result in significant job losses. Given the predominance of women within public sector in areas such as education and health in Newry, Mourne and Down and the high rate of part-time work amongst women it is likely that many of these are in receipt of state benefits to supplement their income. This, combined with public sector cuts, Welfare Reform and the rise in pension ages is likely to significantly impact upon the Newry, Mourne and Down area.

¹⁷ DETI Census of Employment 2013

¹⁸ <http://www.ninis2.nisra.gov.uk/public/Theme.aspx?themeNumber=18&themeName=Labour%20Market>

Figure 3: Percentage of part-time and full-time jobs in NMD by gender



Source: DETI Census of Employment 2013, Employee Jobs by District Council Area (LGD 2014)

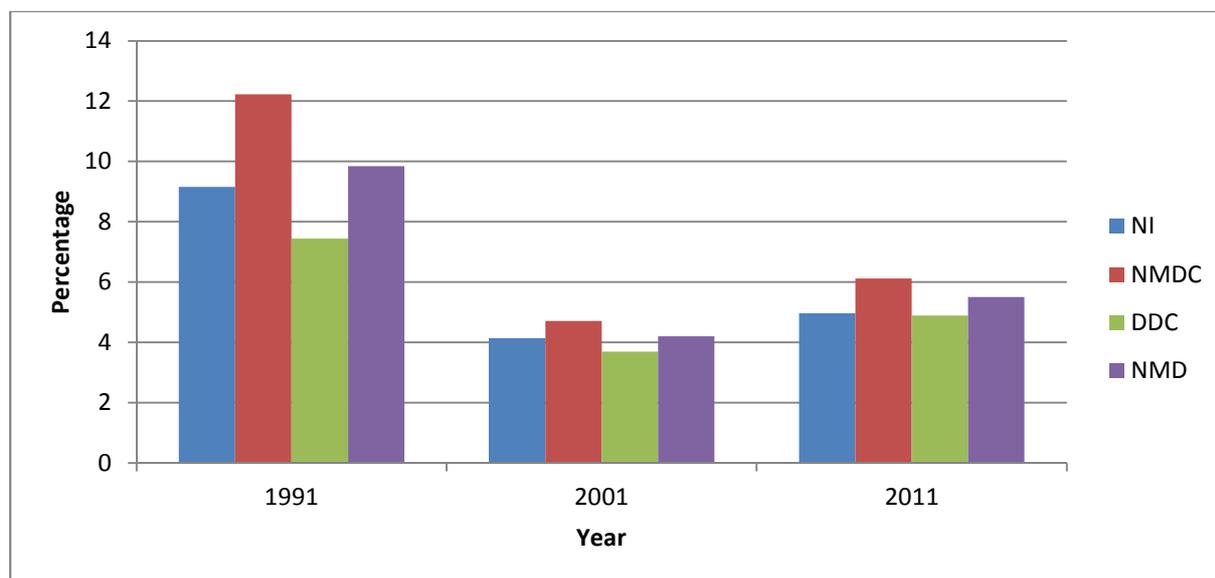
Unemployment

3.23 There are two main indicators of unemployment:

1. The Northern Ireland Labour Force Survey (LFS) measure which follows International Labour Organisation (ILO) guidelines and is the official Northern Ireland measure.
2. The Northern Ireland Claimant Count which is a measure of the number of persons claiming unemployment related benefit (Job Seekers Allowance).

3.24 In Newry, Mourne and Down there was a dramatic fall in unemployment rate between the 1991 & 2001 Census, see figure 4. The rate of unemployment subsequently rose between 2001 & 2011, however the 2011 figure should be treated with caution as the 2011 means of calculating the rate is based on claimant counts and varies from the means used in 1991 and 2001.

Figure 4: NI & NMD Unemployment Rates 1991-2011



Source: NISRA/1991, 2001 & 2011 Census Reports

3.25 The Northern Ireland seasonally adjusted unemployment rate, as measured by the Labour Force Survey (LFS), was estimated at 6.2% for the period January - March 2015. This was down 1.0 percentage point from the rate recorded the previous year (7.2%).

3.26 The number of people claiming benefits is a useful guide to the fluctuation of unemployment rates between census years. Figures for unemployment rates are not available at district level after 2001 and therefore the number of persons claiming benefit may be used as a guide.

Figure 5: Trends in Claimant Count Rates NI & NMD 2001-2014

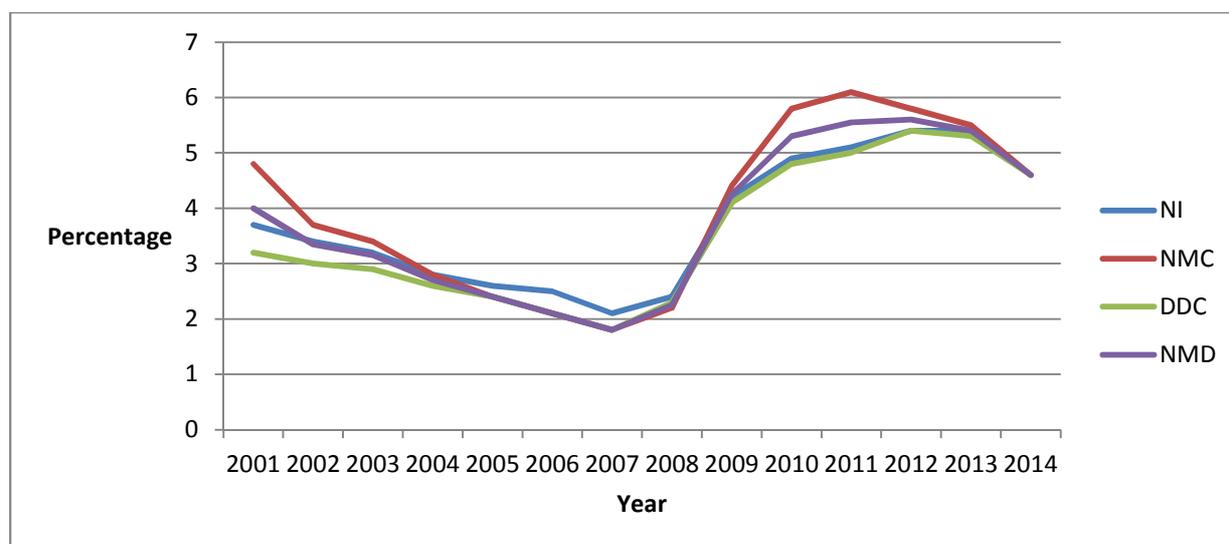


Table 5: NI & NMD Claimant Count Annual Averages 2001 – 2014

Lgd Claimant Count Annual Averages (%)	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
NI	3.7	3.4	3.2	2.8	2.6	2.5	2.1	2.4	4.2	4.9	5.1	5.4	5.4	4.6
NMDC	4.8	3.7	3.4	2.8	2.4	2.1	1.8	2.2	4.4	5.8	6.1	5.8	5.5	4.6
DDC	3.2	3.0	2.9	2.6	2.4	2.1	1.8	2.3	4.1	4.8	5.0	5.4	5.3	4.6
NMD	4.0	3.3	3.1	2.7	2.4	2.1	1.8	2.2	4.2	5.3	5.5	5.6	5.4	4.6

Source: NISRA 2011 Census/Claimant Count Annual Averages (administrative Geographies)

3.27 Claimant count rates suggest that unemployment further declined after 2001 with the lowest rates recorded in the two districts in 2007 which were both under the Northern Ireland average (2.1%). Since then, unemployment rose steadily as a result of the economic recession (Figure 5). Monthly claimant figures for April 2015 show a 20% reduction in claimant counts over the year with Newry and Mourne down by 28.1% and Down reduced by 17.7%. The unadjusted figures for the number of people claiming unemployment related benefits in Northern Ireland stood at 45,885 in March 2015¹⁹. This translates to claimant counts of 2,298(3.6%) and 1,722 (3.9%) for Newry and Mourne and Down respectively.

¹⁹ http://www.detini.gov.uk/labour_market_report_-_april_2015__final_-2.pdf?rev=0

Skills Profile

3.28 As stated in paragraph 3.2, it is anticipated that future economic growth will transition towards more exportable service sectors and if Newry, Mourne and Down is to participate in this direction it will have to supply a suitably skilled and qualified workforce. Education has an important role to play in promoting economic well-being. Better education and training targeting future employment growth areas improves access to employment opportunities, raises productivity and innovation. In addition it plays a very crucial role in securing economic and social progress and improving income distribution.

3.29 Oxford Economics have forecast that the stock of jobs requiring low or no qualifications is to fall by 60,000 by 2020, leading to a large skills mismatch²⁰. In this context of continuing change in demand from factory to office based service sector there will be a need for large numbers of individuals to change careers. As their existing skill sets, competencies and experience will fall short of the demand for a skilled workforce, significant up-skilling and reskilling will be required. This is an important area where the Council and relevant statutory bodies can work with local providers of education and training to address shortfalls and develop tailored learning.

3.30 Census figures in 2011 show that the proportion of people in Northern Ireland aged 16 years old and over who had a degree or higher qualification had increased from 2001 and there was a corresponding reduction in the proportion with no or low qualifications over the same period. Figures for Newry, Mourne and Down show advances in educational achievement over the same period with both categories reflecting or improving on the NI average by 2011 (Table 6).

Table 6: Qualifications of NMD Population over 16 years of age (2001-11)

	Year	Newry & Mourne (%)	Down (%)	NMD (%)	NI (%)
No or low qualifications*	2001	61.27	56.33	58.80	58.87
	2011	40.98	37.04	39.01	40.63
Degree or higher qualification	2001	13.67	16.02	14.85	15.8
	2011	21.7	25.11	23.40	23.65

Source: NISRA Qualifications KS13 (2001) & KS501 NI

* = No or low qualifications (1-4 O Levels/CSE/GCSE or equivalent) qualifications.

3.31 NISRA statistics for school leavers in 2012²¹ show that educational attainment across the council area has continued to improve with Newry, Mourne and Down above the NI average for those leaving with 2 A levels (57.5% v 55%) and those achieving at least 5 GCSEs (79.5% v 78.5%). The proportion of school leavers going into higher education is also above the NI average (46.4% v 42.6%). A highly

²⁰ Oxford Economics: Northern Ireland Economy in Transition: Future Drivers, Challenges, Impacts and issues for Policy Consideration

²¹ NISRA school leavers (administrative geographies) survey 2011-12

educated workforce with skills to match the emerging employment sectors with export potential will continue to be the challenge.

3.32 In summary, the main features of the employment situation in Newry, Mourne and Down can be summarised as follows:

- The level of economic activity in both districts has increased over the 30 year period between 1981 and 2011.
- Unemployment levels have started to fall again after the economic downturn.
- Primary sector employment in Newry, Mourne and Down remains higher than the Northern Ireland average. However, the trend is towards a decline and this will require the provision of new job opportunities.
- In 2011 the proportion of jobs in Newry, Mourne and Down in the secondary sector is marginally higher than the regional average.
- Tertiary employment in Newry, Mourne and Down has risen from 2001 to 2011 in line with regional increases however still remains lower than regional averages.
- The proportion of economically active females has increased and the majority of female employees work in the service sector.
- The majority of males work in construction, manufacturing and wholesale retail trade.
- The majority of businesses are classified as being micro, employing less than 5 people (79%) compared to the regional average 75.6%.
- A significant risk to employment levels in Newry, Mourne and Down is the predominance of the public sector as a source of part –time employment amongst females (48%).
- 39% of the population of Newry, Mourne and Down have no or low qualifications levels.

4.0 Tourism Development

4.1 The NI Executive's Programme for Government (PfG) identifies the Tourism Strategy as one of the 'building blocks' to underpin their first strategic priority of growing a sustainable economy and investing in the future. According to Tourism NI tourism in Northern Ireland generates 40,000 jobs and was valued at £536m in 2011 and targets are in place to grow the industry to £1billion with 10,000 more jobs by 2020. The NI Executive therefore recognises the potential of the tourism industry to deliver significant economic growth over the next few years.

4.2 The land use planning system has a key role in managing tourist related development through planning policies that provide a framework for identifying appropriate development opportunities and safeguarding assets from harmful development.

Regional Planning Policy Context

4.3 The RDS recognises tourism as a key element underpinning sustainable economic growth in Northern Ireland and Regional Guideline 4 (RG 4) seeks to promote a sustainable approach to the provision of tourism infrastructure.

4.4 The Department's PPS 16: Tourism sets out the regional planning policy for tourist development and for the safeguarding of tourism assets. The objectives of the statement are to:

- Facilitate sustainable development in an environmentally sensitive manner;
- Contribute to the growth of the regional economy by facilitating tourism growth;
- Safeguard tourism assets from inappropriate development;
- Utilise and develop the tourism potential of settlements by facilitating tourism development of an appropriate nature, location and scale;
- Sustain vibrant rural community by supporting tourism development of an appropriate nature, location and scale in rural areas; and
- Ensure a high standard of quality and design for all tourism development.

4.5 The SPPS states that Council's new local development plans should bring forward policies for tourism development tailored to specific circumstances of the plan area. The guiding principle should be to facilitate tourism development where this supports rural communities and promotes a healthy rural economy and tourism sector. The SPPS indicates that farm diversification, the re-use of rural buildings and appropriate re-development and expansion proposals offer scope for sustainable tourism in the countryside.

Local Development Plan

4.6 The Council's LDP will therefore contain policies for the protection of tourist assets together with policies for tourist development such as tourism accommodation, amenity facilities, and holiday parks, and the criteria for consideration of such proposals.

4.7 Through utilising existing environmental, historical, cultural and geographic assets, tourism can be an economic driver capable of stimulating further growth and development opportunities. In rural areas tourism is important to the development of the rural economy through supporting and enhancing local services and facilities, offering opportunities for farm diversification to supplement farm incomes or broader rural diversification capable of providing employment.

4.8 As part of the process of developing the evidence base for the new Local Development Plan the Plan Team intend to produce further papers one of which will focus on Tourism. This will provide members with further evidence on the role of the tourism industry within the Council area and provide an aid to discussion on future tourism policies and proposals.

5.0 Harbour Development and Associated Infrastructure

5.1 This section focuses on the contribution of Kilkeel and Warrenpoint harbours to the local economy and highlights how infrastructure development could support their future growth. After the two main hubs in the District (Newry & Downpatrick) Kilkeel and Warrenpoint have the next largest allocation of employment land, 24.57 hectares and 16.94 hectares respectively (see Table 7). The identification of these two locations within this section is to further aid discussion on employment land provision across the District. Other areas of employment will be reviewed as part of the LDP information gathering process.

Kilkeel Harbour

5.2 Kilkeel is the largest fishing port in Northern Ireland and the fishing industry is an important contributor to the local economy (see paragraph 3.10). The fishing industry continues to face significant pressures and a number of studies²² have suggested that the town look to develop a more sustainable economic base. There has been recognition in recent years that the harbour area is an important asset which has the potential, through appropriate investment, to grow and expand existing business, become a key tourist destination, as well as a renewable energy and marine engineering base.

5.3 The Sustainable Kilkeel 2020 study in particular highlighted the potential of the renewable energy sector and tourism in contributing to local economic growth. The study suggested that a leisure marina and off-shore supply and service yard could support the fishing, off-shore energy and marine tourism sectors. Whilst a proposal for 120 wind turbines of the east coast was withdrawn in December 2014 Northern Ireland continues to be seen as a location with “superb offshore wind potential”²³. Kilkeel’s geographical location may offer it a competitive advantage should off-shore renewable energy proposals for the Irish Sea be brought forward again. The local development association, Kilkeel Strategic Partnership, are now considering design options for the harbour that would enable it to accommodate larger fishing vessels and to expand on its marine engineering business.

5.4 Road infrastructure plays a critical role in any land use proposals. Currently the harbour area is accessed via Harbour Road with adjoining economic development land serviced by Moor Road. The draft BNMAP contained proposals for a developer led link road between the Harbour and Moor Road, these were subsequently dropped following consideration at the public examination. Future infrastructure requirements for the harbour area and associated economic development lands will reviewed as part of the LDP process.

5.5 Seascope, Northern Ireland’s first Lobster Hatchery Visitor Experience and Marine Research Centre has recently opened in Binnian Enterprise Park and is an

²² Sustainable Kilkeel 2020 & South East Coast Masterplan

²³ Nick Medic Director of offshore renewables at RenewablesUK

(<http://www.businessgreen.com/bg/news/2384460/northern-irelands-only-offshore-wind-project-scrapped>)

example of how the town is developing its tourism offer and research base through a focus on its strengths. The development of tourism assets was also identified within the South East Coast Masterplan. The Plan proposes that a riverside park and walkway be developed, stretching from the town centre to the harbour. This would provide a high quality park and pedestrian link encouraging movement between the harbour and the town centre. Within the BNMAP 2015 the river corridor is designated a Local Landscape Policy Area and the adjoining mixed use land zoning requires any development proposal to take account of the river corridor. A key site requirement is the provision of a cycle and footpath along the river frontage along with a stipulation that development proposals must incorporate the river corridor into the design layout. The river corridor represents a key opportunity to enhance tourism provision as well as enhancing access to the harbour.

5.6 Through the LDP process there will be the opportunity to consider how land use designations, policies and proposals can further support economic growth and diversification of the harbour, town and local area.

Warrenpoint Harbour

5.7 The RDS states that Newry and Warrenpoint form the South Eastern City Gateway providing strategic road links to Dundalk and on to Dublin and freight services operating out of Warrenpoint harbour. Gateways are strategically important transport interchanges which are important for economic development, freight distribution activities and additional employment generation.

5.8 Warrenpoint harbour is primarily a commercial port for freight services, with a focus on roll on roll off freight. The port engages in very little non-port activities with less than 1% of revenue generated from non-port activities.²⁴ NISRA review of NI ports traffic in 2013 indicated that Warrenpoint had the 2nd highest level of total NI traffic (11%) after Belfast.²⁵ The port is thus an important commercial freight gateway and key employment generator, and road connectivity will continue to play a crucial role in its future growth and development.

Newry Southern Relief Road

5.9 The draft Banbridge, Newry and Mourne Area Plan 2015 (dBNMAP) published in August 2006 included a proposal for a Newry Southern Bypass as a long term strategic road improvement (SRI) to link from the A1, a key transport corridor(KTC)²⁶, to the A2 Warrenpoint Road. Provision of the relief road was seen as important in not only reducing traffic volumes in Newry City Centre but improving access from Warrenpoint Port to the A1.

5.10 Following on from this consultants, engaged by DRD, published a Feasibility Report in August 2009 which identified four possible route corridors for the bypass.

²⁴ DRD Connectivity Review 2014

²⁵ NISRA Statistics Bulletin - Northern Ireland Ports Traffic 2013

²⁶ Strategic long distance routes, forming part of the Regional Strategic Transport Network (RSTN) which connect a number of towns to the major regional gateways.

The BNMAP was subsequently adopted in October 2013 and retained reference to the Newry Southern Relief Road as a long term SRI. The Newry Southern Relief Road proposal as of April 2015 has now progressed into Transport NI's Forward Planning Schedule and work has commenced on the Stage 1 Preliminary Options Scheme Assessment. Once published this assessment is likely to include a range of options with cost estimates and a cost/benefit analysis of each one.

5.11 Given the NI Executive current budget constraints DRD have sought to move this scheme forward by pursuing additional sources of funding. An application for 75% of the funding was submitted earlier this year to European Union under the Trans European Network Project but unfortunately was unsuccessful. DRD continue to investigate other potential sources of funding for this scheme.

5.12 The Newry Southern Relief Road scheme brings with it the potential for increased demand for economic development land through improved connectivity to Warrenpoint harbour as well a boost to tourism through improved access to the south east coast.

6.0 Existing Development Plans and land uptake

6.1 Each of the two existing Development Plans which currently cover the Newry, Mourne and Down Council area set out their approach to facilitating industry and business uses within their respective Plan Strategies. This section discusses the amount of land zoned for economic development uses in each Development Plan and how much of this land remains. The amounts zoned were considered sufficient to meet overall industrial needs to the end of the respective plan periods. Some scope for industrial development on white land²⁷ was also anticipated with further opportunities for employment provided by mixed business zoning in and the restructuring and subdivision of existing or underused industrial premises. Surveys carried out by the Development Plan Team have identified remaining capacity within the current industrial zonings (Table 7).

6.2 Economic development uses comprise general industrial land (Class B2), light industrial (Class B2), business (Class B1) and storage or distribution (class B4) as currently defined in the Planning (Use Classes) Order Northern Ireland 2015.

6.3 Under the provisions of PPS 4 industrial zonings can comprise of both proposed and existing industrial lands in order to not only allow for future industrial development but to protect existing land for economic purposes.

²⁷ This term refers to undeveloped land within a settlement development limit which is not zoned for any specific use. White land sites may be able to accommodate a range of different land uses.

Banbridge, Newry and Mourne Area Plan (BNMAP) 2015

6.4 The Banbridge/Newry and Mourne Area Plan (BNMAP) was adopted in October 2013 and is the Development Plan that covers the former Newry and Mourne District Council area. It zoned 124 hectares of land for industrial purposes in Newry City with a further 45.37 hectares distributed across the main towns of Crossmaglen, Kilkeel, Newtownhamilton and Warrenpoint/Burren. The plan applied a minimum standard of 10 hectares of economic development land in all towns with a population of more than 4,500 and subsequently Warrenpoint/Burren and Kilkeel received a greater allocation than Crossmaglen and Newtownhamilton. In order to provide flexibility in employment provision most of the sites identified for economic development are suitable for a range of employment purposes, including manufacturing, storage and distribution but excluding office and retail development.

6.5 No specific sites were zoned for development in the villages and small settlements except for an extension to the existing industrial estate in Jonesborough. Demand for such use in smaller settlements is generally limited and it was considered that any development proposals could be assessed on their own merits within the context of prevailing planning policy.

6.6 In addition to industrial land zoned in Newry and Mourne 9.71 hectares of land is zoned for mixed use. Mixed use zonings are those that can accommodate a variety of uses which may include light industrial (Class B2), general industrial (Class B3), business (Class B1), storage or distribution (Class B4) as well as non-business use such as dwelling houses (Class C1), community and cultural uses (Class D1).

Newry

6.7 Carnbane North (Zoning NY62), 2.38 hectares is zoned for economic development and this is currently undeveloped. This triangular site is located at the northern end of the Carnbane Industrial Estate. It is bounded by Newry Canal to the west, Newry River to the east and the A1 Newry bypass to the north. Outline planning permission for five industrial storage and distribution units was granted in August 2010 but was not followed up with a subsequent reserved matters or full planning application. With its restricted access development of this site is linked with the future development of the adjacent NY63 site encompassing Invest NI lands.

6.8 Carnbane/Cloughanramer Road (Zoning NY63) 52.38 hectares located to the south of the A1 Newry bypass. Invest NI acquired approximately 29 hectares of this zoning in 2011 for expansion of its existing Carnbane Business Park. The first phase of the development was completed at the start of 2013 with approximately 8 hectares of serviced land now available to be sold or allocated to Invest NI client companies. A further 12.5 hectares is held by Invest NI for future development. Currently 51.64 hectares remains undeveloped.

6.9 Carnbane Road/Tandragee Road (Zoning NY64), 2.89 hectares to the west of the Carnbane Industrial Estate is currently undeveloped. This site is detached from the rest of the Carnbane Industrial Estate, separated by the Newry canal, and will

require the Carnbane Road to be realigned and widened before development can commence. There are no extant planning permissions nor any applications currently under consideration.

6.10 Carnbane Business Park (Zoning NY65) 21.65 hectares. The majority of this site has now been developed, most recently with the expansion of MJM Marine. Currently 3.35 hectares adjacent to NY 63 remains to be developed and this forms part of the Invest NI land holding.

6.11 Carnbane South (NY66) 3.95 hectares to the south of Carnbane Business Park. The majority of the undeveloped land within this zoning now consists of a 0.92 hectare site adjoining the existing Norbrook facility. This land currently forms part of the Norbrook land holding. Norbrook received planning permission in 2013 for a further production facility to the north of their site, once constructed this will further restrict access to the undeveloped site within NY66.

6.12 Craigmore Road (NY67) 11.30 hectares is zoned and 9.1 hectares remain undeveloped. There are no extant planning permissions nor any applications currently under consideration.

6.13 Damolly (NY68) 2.86 hectares. This brownfield site comprising a former Customs and Excise import/export station and livestock pens is currently vacant. An application for a mixed use development which includes 70 No. light industrial/business units on the site was approved in August 2014.

6.14 Chancellors Road (NY69) 19.46 hectares. To date this site remains undeveloped. An application for a light industrial factory and associated office on 0.5 hectares of the zoned site, with access onto the Carnagat Rd is currently under consideration. A key site requirement of this zoning is the realignment and widening of Chancellors Road along the site frontage and extending this to link with the upgraded access to the A1. There are therefore significant infrastructure costs associated with the future development of this site. There are no extant planning permissions on the site.

6.15 The BNMAP zoned 7.28 hectares at Loughway (NY70) within the Greenbank Industrial Estate. Currently 4.19 hectares remain undeveloped. Invest NI's land holding within the Greenbank Estate is now largely developed with only 1.44 hectares remaining. However given the remaining undeveloped land at Carnbane, Invest NI have not identified any immediate need for additional land in Newry.

6.16 Mixed use zoning (NY71) 2.85 hectares at Tandragee Road. Currently 2.76 hectares remain undeveloped.

Crossmaglen

6.17 Crossmaglen is a service and employment centre for the local area and 1.65 hectares is zoned for economic development off the Newry Road (CM10). Part of the site was approved for a Council household recycling centre in April 2009 and this is now in operation. Approximately 0.5 hectares, at the rear of the site, remains to be developed. An outline planning application is currently under consideration for storage and distribution units on the undeveloped part of the zoning.

Kilkeel

6.18 Moor Road, the harbour (KL19) 18.38 hectares are zoned for economic development. Within this zoning a number of dwellings have been constructed along the frontage of Moor Road. A number of industrial applications have also been approved but never implemented, these have now expired. Currently 13.92 hectares of land remains to be developed.

6.19 At Newcastle Road (KL 20) 2.07 hectares are zoned and 2 hectares of this zoning remains undeveloped. Moor Road/Newcastle Road West (KL21) has 0.58 hectares zoned and 0.42 hectares remains undeveloped. Moor Road/Newcastle Road East (KL22) 3.51 hectares are zoned and to date none of this has been developed. There are no extant planning permissions nor any applications currently under consideration on any of these three zonings.

Newtownhamilton

6.20 A site measuring 0.46 hectares north of the Newry Road (NN06) is zoned for economic development. Currently the site remains undeveloped, there are no extant planning permissions nor any applications currently under consideration.

Warrenpoint/Burren

6.21 In accordance with its role as a major gateway and local employment/service centre, 16.94 hectares of land are zoned for economic development in Warrenpoint/Burren. These are located at Warrenpoint Industrial Estate, Newry Road and at two industrial estates in Burren.

6.22 Upper Dromore Rd/Burren Road (WB 24) 13.55 hectares zoned for economic development of which 12.94 hectares remain to be developed. Newry Road (WB 25) 1.53 hectares of land zoned for economic development and currently undeveloped. Warrenpoint Harbour Authority have submitted an application for a change of use to port operational land and this is currently under consideration. Milltown West (WB 26) 1.86 hectares of land at the Milltown West Industrial Estate are zoned for industry and 0.8 hectares are currently undeveloped.

Jonesborough

6.23 Within the settlement limit 1.24 hectares of land are zoned for economic development at Flurrybridge Enterprise Centre. Approval was granted for 15 general industrial units in May 2012, these have now been completed. It is considered that the zoned site is now developed.

Ards and Down Area Plan (ADAP) 2015

6.24 The Ards and Down Area Plan (ADAP) was adopted in March 2009 and is the Development Plan that covers the former Down District Council area. The ADAP zoned 19.7 hectares of land for industrial purposes in Downpatrick in keeping with its status as a main hub and strategic role as a centre of employment. A further 5.3 hectares were distributed across the main towns of Ballynahinch and Newcastle. In addition to the land zoned for industrial development within settlement limits, the ADAP identified 3.95 hectares at the Ballynahinch Rd, Crossgar for industry and 12.52 hectares of undeveloped industrial land at the serviced Invest NI site off the Belfast Road, Downpatrick (Down Business Park)

6.25 The ADAP also identified Industrial Policy Areas within the settlement limits of a number of villages and one small settlement. Whilst these lands are considered particularly suitable for industry or business they do allow, unless otherwise stated, alternative types of development. The alternative use must be subordinate to the industrial or business use and be able to exist in close proximity to the preferred use without adverse environmental consequences. Lands designated as Industrial Policy Areas are not however included within the figures for industrial land zoning. A list of the Industrial Policy Areas identified in the ADAP is contained in Appendix E.

Downpatrick

6.26 In Downpatrick the ADAP zoned 7.9 hectares of industrial lands immediately west of the Killough Road (DK14). To date none of this zoning has been developed and there are no extant planning permissions nor any applications currently under consideration. To the east of the Killough Road are 11.8 hectares of zoned industrial lands (DK 15). This zoning incorporates the undeveloped lands fronting onto the Killough Road as well as the established Killough Road Industrial Estate owned by Invest NI. Currently 9.18 hectares of the land remains undeveloped within zoning DK 15.

6.27 The ADAP also identified Invest NI's industrial estate located outside the Downpatrick settlement limit on the A7 Belfast to Downpatrick Link Corridor (Down Business Park). At the time of adoption, August 2009, some 19.83 hectares of land remained to be developed (proposal COU12). Invest NI have indicated that as of May 2015 10.64 hectares of the site remains for future development. Survey of the site undertaken in May 2015 by the Plan Team indicates that whilst a further 9.87 hectares remains undeveloped, this remainder may have limited or no development potential due to the topography, and/or ground conditions.

Ballynahinch

6.28 In Ballynahinch 5.05 hectares were zoned at the Old Belfast Road (BH17). This site is well placed in relation to the strategic road network, the proposed Ballynahinch bypass²⁸, and the proposed park and ride/park and share site adjacent to the Belfast Road, outside the settlement limit. To date none of the site has been developed.

Newcastle

6.29 In Newcastle 0.33 hectares of industrial land are zoned for industrial use adjacent to Mourne View Avenue (Zoning NE15). Permission was granted for four industrial units within a single portal framed building in 2001. The site is now fully developed. Employment within Newcastle is predominantly within the service sector consequently the demand for industrial lands within the town has historically been very low.

Table 7: Summary of land zoned for industry in Newry, Mourne and Down

Settlement	Total Area Zoned (ha)	Area Developed (ha)	Average Area Developed Per Year (ha)	Area lost or discounted (ha)	Area Remaining* [vacant] (ha)
Banbridge, Newry & Mourne Area Plan 2015: Based on land developed over the plan period 2000-2015					
Newry City	124.05	17.93	1.20	7.39	96.70 [2.03]
Crossmaglen	1.65	0.00	0.00	1.15	0.50
Kilkeel	24.57	1.41	0.09	3.31	19.85
Newtownhamilton	0.46	0.00	0.00	0.00	0.46
Warrenpoint/Burren	16.94	0.44	0.03	1.23	15.27
Jonesborough	1.24	1.24	0.08	0.00	0.00
Newry & Mourne District Total	168.91	21.02	1.40	13.08	132.78[2.03]
Ards and Down Area Plan 2015: based on land developed over the plan period 2000-2015					
Downpatrick	19.7 (34.00**)	0.73 (5.88**)	0.05 (0.39**)	1.84 (7.53**)	16.83[0.3] (20.51**)[0.08]
Ballynahinch	5.05	0.00	0.00	0.30	4.75
Newcastle	0.33	0.33	0.02	0.00	0.00
Down District Total	25.08 (34.00**)	1.06 (5.88**)	0.07 (0.39**)	2.14 (7.53**)	21.58[0.3] (20.51**)[0.08]
NMD Total	193.99 (227.99***)	22.08 (27.96***)	1.47 (1.86***)	15.22 (20.75***)	154.36 [2.33] (174.87***)[2.41]

Source: NMD Planning Survey of Zoned Industrial Land (May & June 2015)

*Area remaining (hectares) excludes any area that cannot be developed due to constraints (eg flooding) or has been developed for non employment uses (eg housing).

** Industrial land within the Invest NI Industrial Estate on the Belfast Road, Downpatrick but not zoned for industry.

*** Total is a combination of both zoned industrial land and the unzoned Invest NI site industrial estate on the Belfast Road.

²⁸ Proposals for the Ballynahinch bypass including an Environmental Statement published by Transport NI in March 2015.

6.30 Within the Newry, Mourne and Down Council area 193 hectares is zoned for employment use in the current area plans. In addition a further 34 hectares are located within the Invest NI business park on the Belfast Road in Downpatrick and these are also suitable for employment use.

6.31 Table 7 above shows the results of surveys of zoned industrial land carried out in May and June 2015. The survey results show that 27 hectares of land are currently in industrial use, with a further 154 hectares of zoned industrial land remaining undeveloped across the Council district. The majority of undeveloped land is located within the two main urban centres of Newry and Downpatrick. In Newry 96 hectares are undeveloped with the majority concentrated to the north of the city at Carnbane Business Park. In Downpatrick 42 hectares are undeveloped, evenly distributed between the Down Business Park and lands at Killough Road.

6.32 The majority of industrial development in both Newry and Mourne, and Down has been for general industry (The Planning (Use Classes) Order (Northern Ireland) 2015 – UCO class B4) together with storage and distribution (UCO B4).

7.0 The Need for Future Employment Opportunities

7.1 As part of the preparation of the local development plan, an estimate of the amount and the location of land are required to ensure an ample supply of suitable land is available to meet economic development needs. This should take into account various factors including past trends in take-up of land for economic development purpose.

7.2 In order to estimate the amount of land required, three methodologies are used as follows:-

1. - Based on the amount of land developed to date;
2. - Based on population growth and unemployment; and
3. - Based on applying the average number of jobs created between 1999 and 2013.

(a) Method 1- based on the amount of land developed to date

7.3 The average take up of land zoned in Newry and Mourne over the BNMAP period (2000 to 2015) is 1.4 hectares per annum, suggesting that 21.02 hectares will be needed up to 2030. Theoretically there is sufficient land zoned in Newry and Mourne to meet demand past 2030 based on past rates of uptake. For Down, over the ADAP period (2000 to 2015) the average take up of land zoned for industry (excluding mixed business zonings but including the non zoned Invest NI Industrial Estate in Downpatrick) is 0.46 hectare per annum , suggesting some 6.90 hectares will be needed up to 2030. Therefore, overall, there may be a need for 27.92 hectares of zoned land based on past take up rates.

7.4 However, in applying such a broad-brush approach, recognition is not given to the disparities between take up on different land zonings. Our land use

zonings comprise of land brought forward by Invest NI and land brought forward by the private sector. Take up has tended to be greater on zonings where Invest NI (Carnbane, Newry and Belfast Road, Downpatrick) has intervened to provide serviced sites which tend to be more attractive to investors because they are closest to the main transport corridors. The delivery of sites on privately owned land is dependent upon the landowner's willingness to sell at a reasonable price.

7.5 Furthermore, with this method of assessment, take up rates can also be skewed by the development of one single site. It also does not take account of land developed for employment/industry on unzoned²⁹ land and does not allow for changes in take up rates as a result of changing economic conditions, technology and communication, for example the loss of jobs within any of the established businesses would impact on figures.

(b) Method 2 – based on population growth and unemployment

7.6 To estimate the number of jobs required (which can later be translated into land requirements), a methodology has been used based on economic activity, unemployment rates and the latest (2012-based) population projections from NISRA³⁰. By applying NISRA population projections, it is possible to estimate the number of people who will be economically active in 2030. The economic activity rates etc for each former district in 2011 have been added together and averaged to give a figure for the new Council area. An unemployment rate of 4% has also been assumed based on the average claimant count for NMD over the period 2001- 2014 (see table 5).

7.7 Thus the following economic activity rates from the Census 2011 have been used:

- Newry & Mourne = 65.49%
- Down = 67.12%
- Newry, Mourne and Down = 66.30% (rounded to **66%**)

7.8 A figure for the working age population has been estimated using the proportion of the Newry, Mourne and Down population aged 16-74 in 2011 i.e. 71.32% (rounded to 71%). This is then applied to the population estimates derived from NISRA. A number in employment can therefore be estimated for 2015 and 2030 by applying the economic activity rate of 66% and an unemployment rate of 4% (see Table 8 below).

²⁹ The unzoned Invest NI industrial estate off the Belfast Road in Downpatrick have however been included.

³⁰ NISRA population projections within NI, see <http://www.nisra.gov.uk/demography/default.asp47.htm>

Table 8 Estimated Number in Employment in NMD 2015 - 2030

	2015	2020	2025	2030
Population Estimate by Year*	177,681	185,011	191,833	197,836
Population Ages 16-74 (71%)**	126,154	131,358	136,201	140,464
Economically Active Population (66%)***	83,262	86,696	89,893	92,706
The number in employment (less 4% unemployment rate)	79,932	83,228	86,297	88,998
Notes: *2012 NISRA Newry, Mourne and Down Population projections. **Figure for population aged 16-74 for each year is derived as 71% of the population of that year equivalent to the 16-74 proportion in 2011. ***Figure for economically active assumes a continuation of the level for economically active in 2011, i.e. 66% (Economically active includes those persons who are unemployed). ****Unemployment rate based on the average claimant count for NMD over 2001-2014 period (4%).				

7.9 By subtracting the number in employment in 2015 from the number in employment in 2030, the total number of additional jobs required between 2015 and 2030 is 9,066. Using the 2008 based population figures, as detailed in the population and growth paper 1, the number of estimated jobs would have been 11,807. The 2012-based population projections however now suggest a slower rate of population increase over the decade 2012-2022 and therefore fewer additional jobs would be required.

(c) Method 3 – based on applying the average number of jobs created between 1999 and 2013

7.10 An estimated 8,599 additional jobs were created during the period 1999 and 2013 (Census of Employment, DETI) which included years when jobs were lost due to the recession. This equates to an average of 614 jobs per annum over the period. If this average figure is applied to plan period 2015-2030, potentially 9,213 jobs might be created which is more than the estimate provided under Method 2.

7.11 A weakness of methods 2 and 3 is that they do not differentiate between full time and part-time jobs but for planning purposes, the aim is to provide a generous choice of land for economic development.

7.12 Having estimated the number of jobs required, a further estimate can be made on the number of new jobs needed in each main sector (manufacturing, construction and services) and how this can be translated into land requirements. The Census of Employment (DETI) indicates that the proportion of jobs in manufacturing in Newry, Mourne and Down in 2013 was 11.8% and jobs in services accounted for 79.8% (Table 9). How these proportions translate to the figures provided under Methods 2 and 3 is set out in Table 10. The remaining jobs will be in areas such as construction, forestry, fishing, mining, quarrying, electricity, gas and water supply.

Table 9 Employee Jobs by Industry 2013

	Total No of Jobs	Jobs in Manufacturing (%)	Construction (%)	Services (%)
NI	691,501	75031 (10.84%)	29382 (4.25%)	577,389 (83.45%)
Newry & Mourne	32,666	5042 (15.43%)	2036 (6.23%)	24732 (75.70%)
Down	18,297	991 (5.42%)	1043 (5.70%)	15976 (87.30%)
NMD	50,963	6033 (11.84%)	3079(6.04%)	40,708 (79.87%)

Source: DETI Census of Employment 2013
<http://www.detini.gov.uk/stats-census-of-employment>

Table 10 Jobs required by 2030 projected by NMD industrial makeup (%) 2011

	Total No of Jobs required to 2030	Percentage and Total No Jobs in Manufacturing	Percentage and Total No Jobs in Construction	Percentage and Total No Jobs in Services	Other Jobs (%)
NMD Industrial Makeup (2011%)		11.84%	6.04%	79.87%	2.25%
Model 2	9,066	1,073	547	7,242	204
Model 3	9,213	1,091	557	7,358	207

7.13 Translating industrial and business employment levels to a land requirement is problematic given the variance of employment densities between uses. Research by Colliers CRE showed density ranged from 1 job per 16sqm at Doxford Park, Sunderland to 1 job per 99 sqm at Sherwood Business Park, Annersley, Nottinghamshire. Similar disparities have been shown up by surveys of industrial estates carried out by DOE Planning in 2005 and 2010. These established that average employment densities at older industrial estates where there was still a significant element of general industrial/engineering and storage/distribution uses fell within a range of between 1 job per 50 sqm and 1 job per 80 sqm.

7.14 Establishing employment levels per hectare is equally problematic. Research by Colliers CRE³¹ suggests that this could vary from 85 jobs per hectare on a modern industrial estate and up to 600 employees per hectare on an estate with a predominance of call centres. Research by Touche Ross for the Craigavon Economic Revitalisation Strategy 1994–2000 suggested a ratio of 50 employees per hectare. DOE Planning’s studies of four industrial estates found that employee densities averaged 42 jobs per hectare and ranged from 17 to 97 jobs per hectare. These reflect a broad range of age and type of industry with a mix of industrial and business uses. It is therefore not unreasonable to assume that an employment ratio

³¹ Business Parks Research Study March 2003

of one job per 25 square metres floorspace and 50 jobs per hectare can be achieved on new industrial and business land. This is also in keeping with Invest NI's view that there are opportunities for new hi-tech and business uses but that more traditional indigenous industries will continue to play an important role.

7.15 Thus, by applying a density of 50 jobs per hectare to our new jobs in manufacturing and services as estimated under method 2 and method 3, some **166** hectares of economic development land would be required under method 2 and **169** hectares would be required using method 3. In order to build in as much flexibility and choice as possible over the plan period whilst also keeping it anchored, it is recommended that the higher figure is chosen. Industrial land surveys in May & June 2015 reveal that there is approximately 155 hectares of zoned employment land (excluding mixed use) and a further 20 hectares³² of unzoned employment land undeveloped in Newry, Mourne and Down.

7.16 Considering the potential of 175 hectares (see Table 7, Newry, Mourne and Down total area remaining) of employment/potential employment land within Newry, Mourne and Down the higher projected figure of **169** hectares required for 2015-2030 is achievable. Furthermore most jobs will be in the service sector rather than on industrial-type estates. Employment densities are greater in the service sector and most service jobs are found in the town centre and other locations better suited for shops, restaurants, offices, and public and community services this will therefore reduce demand for sites within traditional industrial estates. Employment will also occur in some industrial activities associated with villages and as part of farm diversification in the countryside.

7.17 With approximately 175 hectares of economic development land remaining across Newry, Mourne and Down, there may be no immediate need to identify additional land. However, in keeping with the RDS, there is a need to assess the 'fitness for purpose' including environmental implications of existing employment land provision. This will principally help to identify the 'best' employment sites to be retained and protected, replaced or released for other uses.

7.18 The final technical supplement which will incorporate updates of the housing, population and economic development papers, will show how this amount of economic development land can be allocated across the settlements. However, according to the RDS and the SPPS, the focus of any allocation of economic development land should be within the main hubs. This does not exclude land zonings in the local towns and villages although normally land is not zoned in villages as prevailing regional policy currently facilitates development within and outside village settlement limits. The SPPS states that within villages and small settlements the LDP will not normally zone land for economic development purposes as this could inhibit flexibility.

³² Belfast Road, Downpatrick

7.19 The three methods would suggest the following employment land requirement for the Newry, Mourne and Down area from 2015 to 2030.

1. Based on the amount of land developed to date: 28 ha;
2. Based on population growth and unemployment: 166 ha;
3. Based on applying the average number of jobs created between 1999 and 2013: 169 ha.

The Regional Development Strategy (RDS) directs that we should 'ensure adequate supply of land to facilitate sustainable economic growth and therefore method 3 is considered the best option to 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.

8.0 Allocating Economic Development Land

8.1 In determining how much economic development land needed it is assumed that all new jobs will be in the secondary and tertiary sector. Growth in the primary sector is unlikely given that long term past trends suggest employment has been in decline. In Newry, Mourne the manufacturing sector is still a significant employer, and it is anticipated that this sector will still have a major role to play, complemented by exportable services such as IT, professional & business services.

8.2 As indicated if a minimum requirement of 169 hectares of economic development land is applied it will provide a degree of flexibility. It assumes all new jobs will be on zoned land, which of course will not be the case. Increases in employment can also occur in town centres, and other mixed use areas and other buildings within the town and as a result of home working and farm diversification. Employment densities in existing buildings and in terms of land use may also increase. Oxford Economics identifies that many new jobs will be knowledge based. In England where call centres can occupy much of an industrial estate, employment densities of 200 jobs per ha are common (Belfast Metropolitan Area Plan background studies). Accordingly 169 hectares will inevitably result in a degree of over zoning allowing the plan to provide a choice of sites at different locations and of different sizes to encourage and aid economic growth.

8.3 In considering how these sites should be allocated across settlements, the RDS makes it clear that the hubs should be the focus of growth. Newry and Downpatrick are the main hubs, although it does not exclude zonings in other locations. Careful consideration needs to be given to how the minimum figure is apportioned. Given the clear direction of regional policy it is suggested that the minimum figure is distributed between Newry and main towns based on one of the following three options.

Option One: Equal Share

8.4 Provide each of the main hubs an equal share aiming to provide around 84.5 hectares minimum in each hub. The benefit of this approach is that it treats each hub equally, which could be of benefit to Downpatrick by offering a greater range & choice, but in turn could significantly restrain growth in Newry in comparison to current sites on offer at present.

Option Two: District Hinterlands and Catchment

8.5 Assuming the former council districts broadly coincided with their hinterlands it is possible to proportion growth providing regard to catchment. In Newry, Mourne and Down the former districts population equated as 58.8% Newry & Mourne (99,480*) and Down 41.2% (*69,731). In relation to the overall Newry, Mourne and Down projected provision of 169 ha employment land, this broadly equates to 99 ha for Newry and 70 ha for Downpatrick.

Option Three: Population of City/Town/Urban Area

8.6 Based on the 2011 Census, 26,893 people lived in Newry (71.2% of NMD), 10,874 people lived in Downpatrick (28.8% of NMD). Apportioning growth on this basis and focusing on the main hubs only, suggests that of the 169 hectares, 120 hectares should be allocated to Newry, and 49 hectares for Downpatrick.

8.7 The local towns also have a role to play in providing employment. However, because their needs are smaller, attaching an allocation figure is more difficult. A distribution on the basis of population size alone, whilst crude, gives an indication of how employment land could be allocated to the main towns within the District (see Table 11 below). Invest NI suggest that in their experience it becomes viable to provide an Industrial estate at around 12 hectares, which may provide a bench mark to review provision of the sites.

Table 11 Employment land allocation by settlement

City/Main Town	Population ³³ (%)	Hectares
Newry	26,893 (40.46%)	68 ha
Downpatrick	10,874 (16.36%)	28 ha
Warrenpoint/Burren	8,721 (13.12%)	22 ha
Newcastle	7,743 (11.64%)	20 ha
Kilkeel	6,521 (9.81%)	17 ha
Ballynahinch	5,715 (8.59%)	14 ha
Total	66,467 (100%)	169

Source: NISRA 2011 Census – Headcount and Household Estimates for Settlements

³³ Census 2011 - Headcount and Household estimates for settlements

8.8 There is no requirement to zone economic development land in the villages, and regional policy gives some scope for small rural enterprises to be developed in the countryside outside of villages where there is no land available. Often this can provide a better solution as it allows residents of the village some separation from economic development uses.

8.9 Demand could also be used to inform economic development zoning however it is difficult to quantify demand on privately owned sites and the only real indicator of this is Invest NI. Invest NI land holdings in Newry, Mourne and Down include land in Carnbane Industrial Estate in Newry together with Down Business Park and Killough Road Industrial Estate in Downpatrick. Invest NI have indicated they have serviced sites available in both Newry and Downpatrick with additional unserviced lands held in reserve.

8.10 A combination of the above approaches – a form of hybrid – may be the preferred option for zoning economic development land but at this stage the Council does not have to finalise anything as the Preferred Options Paper can be used to sound out public opinion and to seek interest from landowners who would be willing to propose that their land could be used for economic development purposes.

8.11 As well as identifying and protecting zoned land and previously developed land for economic development, the Plan may bring forward policies regarding the type or range of economic development uses that will be acceptable within zoned sites and identify opportunities for mixed uses development. It will also be expected to introduce policies aimed at benefiting the rural economy, such as farm diversification, the re-use of rural buildings and appropriate redevelopment and expansion proposals for industrial and business purposes, while at the same time ensuring there is protection and enhancement of the environment.

9.0 Locations of Individual Zonings

9.1 From the study it appears that there is sufficient land zoned in the short to medium term. As such there may only be a need to bring forward limited additional land at the plan strategy stage. However it is not clear as to whether all the sites are deliverable in terms of there being a willing seller and purchaser prepared to invest in the necessary infrastructure. It is therefore advised that a full review of the existing sites is undertaken for the local policies stage of the plan process.

9.2 To aid this, existing landowners should be asked whether they are prepared to release their land for economic development at market value and the Preferred Options Paper used to call for alternative sites, which may be evaluated in the second stage of the plan process.

10.0 Conclusion and Key Findings

10.1 From the research it is clear that both Newry and Mourne and Down have experienced a slow take-up rate of employment/industrial lands. This paper has provided an indication of the ability of the existing Area Plans to deliver the anticipated number of jobs required to 2030. Given that job market recovery has been slow in Northern Ireland, job creation for the new Plan will be challenging and with the cuts in the public sector recently announced, local economies may need to focus on growth sectors such as professional services, information and communications. This will also require people who are highly skilled.

10.2 A summary of the key findings are as follows:-

(i) Newry, Mourne and Down has a strong manufacturing and service base. Future jobs growth is expected to be in sectors such as information and communication and the professional and technical services. Any plan should try to facilitate growth in this sector. In selecting land for development, it is important to provide sites with quality environments and good infrastructure to attract businesses.

(ii) The number of new jobs required for the period 2015-2030 is estimated to be up to 9,213. The majority (approximately 80%) of these are expected to be provided within the service sector.

(iii) Based on the estimated number of jobs required in manufacturing and services, between **166** and **169** hectares of zoned land are required. In order to comply with Regional Planning Policy it is recommended that the hubs take the largest share of zoned employment land.

(iv) A number of options for distributing employment land have been identified:

Option 1 – Equal share of zoned land between Newry and Downpatrick. This would allocate 84.5 ha to both Newry and Downpatrick.

Option 2 – District hinterlands and catchment. Based on population of each former district 58.8% to Newry and 41.2% to Downpatrick. This equates to 99 ha for Newry and 70 for Downpatrick.

Option 3 – Focus growth on the main hubs only. Newry contains 26,893 people (71.2%) and Downpatrick 10,874 (28.8%). On this basis Newry would receive 120 ha while Downpatrick would receive 49 ha.

Land should also be allocated in the local towns and it is recommended that this is done on the basis of their populations and hinterlands.

(v) The Plan should also be innovative in its approach to zonings, recognising the opportunities which exist adjacent to key transport corridors.

(vi) The Plan can help tackle disadvantage and facilitate job creation by providing a range of suitable sites for economic development including opportunities for regeneration and mixed use developments.

(vii) It must be recognised that a development plan's economic zonings will not cater for all future economic growth. Within Newry, Mourne and Down there is a vibrant rural entrepreneurial spirit within the villages and open countryside. It is important that the Plan provides policy which can facilitate sustainable rural businesses.

(viii) Where there is a skills gap, there may be a need to provide additional training as well as the provision of community and other public facilities. Where such a need is required, it should be identified through the Community Plan. If there are firm proposals, the Plan should provide a flexible policy to facilitate them by reserving land through zonings.

10.3 With approximately 175 hectares of economic development land remaining across Newry, Mourne and Down, there may be no immediate need to identify additional land.

10.4 There is a need however for a full evaluation of the deliverability of lands currently zoned to determine whether the owners are willing to provide this land for economic development, other constraints to development and whether there are others willing to provide land. An evaluation of sites will be undertaken before final zonings are included in the Local Policies Plan.

10.5 A review of policies within PPS4 should be undertaken to identify options for policy revisions for member consideration. This should include whether sufficient protection is afforded to existing industrial sites.

10.6 Once the Council's local development plan is adopted the Council will be required to monitor employment land supply on an annual basis as part of the statutory Annual Monitoring Report. Such monitoring will highlight any issues arising and will allow assessment of plan policies and proposals that meets the needs of the population.

10.7 The plan team would welcome member views on the options that have been presented for allocating employment land across the plan area.

Appendix A Employment Land Evaluation Framework

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

Source: Regional Development Strategy 2035, Table 3.1 The Employment Land Evaluation Framework.

Appendix B Newry & Mourne District Zoned Industrial Land

Settlement	Location (Zoning Ref)	Area zoned for industry (Ha)	Area developed for industry (Ha)	Area lost/developed for non-industry (Ha)	Area remaining undeveloped [vacant] (Ha)
Newry City	Carnbane North (NY62)	2.28	0.00	0.00	2.28
	Carnbane/Cloughanramer Road (NY63)	52.38	0.00	0.74	51.64
	Carnbane Road/Tandragee Road (NY64)	2.89	0.00	0.00	2.89
	Carnbane Business Park (NY65)	21.65	10.87	5.85	3.35 [1.58]
	Carnbane South (NY66)	3.95	3.03	0.00	0.92
	Craigmore Road (NY67)	11.3	2.19	0.00	9.11
	Damolly (NY68)	2.86	0.00	0.00	2.86
	Chancellors Road (NY69)	19.46	0.00	0.00	19.46
	Loughway (NY70)	7.28	1.84	0.8	4.19 [0.45]
Crossmaglen	Newry Road (CM10)	1.65	0.00	1.15	0.50
Kilkeel	Moor Road - The Harbour (KL19)	18.38	1.3	3.16	13.92
	Newcastle Road (KL20)	2.07	0.00	0.07	2.00
	Moor Road/Newcastle Road West (KL21)	0.58	0.11	0.05	0.42
	Moor Road/Newcastle Road East (KL22)	3.54	0.00	0.03	3.51
Newtownhamilton	Newry Road (NN06)	0.46	0.00	0.00	0.46
Warrenpoint/Burren	Upper Dromore Road/Burren Road (WB24)	13.55	0.00	0.61	12.94
	Newry Road (WB25)	1.53	0.00	0.00	1.53
	Milltown West (WB26)	1.86	0.44	0.62	0.80
Jonesborough	Jonesborough (JH 06)	1.24	1.24	0.00	0.00
	Total	168.91	21.02	13.08	132.78 [2.03]

Appendix C Newry & Mourne District Zoned Mixed Use Land

Settlement	Location (Zoning Ref)	Area zoned (Ha)	Area developed for industry (Ha)	Area developed for non-industry (Ha)	Area remaining undeveloped (Ha)
Newry City	Tandragee Road (NY71)	2.85	0.00	0.09	2.76
Crossmaglen	Cullaville Road (CM11)	3.36	0.00	0.00	3.36
Kilkeel	Riverside (KL23)	1.75	0.00	0.00	1.75
	Former Mourne Hospital, Newry Street (KL24)	1.75	0.00	0.00	1.75
Total		9.71	0.00	0.09	9.62

Appendix D Down District Zoned Industrial Land

Settlement	Location (Zoning Ref)	Area zoned for industry (Ha)	Area developed for industry (Ha)	Area lost/developed for non-industry (Ha)	Area remaining undeveloped [vacant] (Ha)
Downpatrick	Killough Road Industrial Estate (DK14)	7.9	0.25	0.00	7.65
	Cloonagh Road and Brannish Road (DK15)	11.8	0.48	1.84	9.18 [0.3]
	Down Business Park, Belfast Road (COU 12)*	34	5.88	7.53	20.51 [0.08]
Ballnahinch	Old Belfast Road (BH17)	5.05	0.00	0.30	4.75
Newcastle	Adjacent to Mourne View Avenue (NE15)	0.33	0.33	0.00	0.00
Total		59.08	6.94	9.67	42.09 [0.38]

*Site located outside the settlement limit for Downpatrick, forms part of countryside proposals within the ADAP.

Appendix E Down District Industrial Policy Areas

Settlement	Location (Ref)	Area (Ha)	Additional Info.
Village			
Annsborough	Former Textile Mill (IPA/HPA1)	4.47	Mix of light industry and housing within the former mill. Former engineering works and disused factory to the north of the mill complex suitable for industry only.
Ardglass	Lands at Downpatrick Rd (IPA1)	2.09	Entire site to be used for industrial use and no other purpose.
Crossgar	Lands at Kilmore Rd (IPA1)	0.4	Entire site to be used for light industrial use.
	Ballynahinch Rd (COU11)*	3.95	Former saw mill and egg packing store, entire site for general or light industrial use
Shrigley	Lands east of Shrigley Rd (IPA1)	6.39	Lands within the grounds of the former mill and tannery adjacent to Shrigley Rd, considered suitable for future industrial use.
Small Settlement			
Ballyhornan	Lands at Killard Rd (IPA1)	1.82	Opportunity for employment use as starter units in former RAF accommodation
	Lands at Killard Rd (IPA2)	2.00	
	Total	21.12	

*Site located outside the settlement limit for Crossgar, forms part of countryside proposals within the ADAP.

Appendix F: Definitions of Employment Sectors³⁴:

- The primary sector of the economy is the sector of an economy making direct use of natural resources. This includes agriculture, forestry, fishing and mining.
- The secondary sector of the economy is the sector of an economy producing, assembling and manufacturing goods. This includes those economic sectors that produce a finished, usable product.
- The service or tertiary sector is the sector of an economy producing services. The service sector consists of soft parts of the economy, i.e. activities where people offer their knowledge and time to improve productivity. Performance, potential and sustainability.

Definitions of Primary, Secondary & Tertiary/Service Sector Employment for Census 2011.

Classification	Category
1. Primary	A. Agriculture, Forestry and Fishing. B. Mining and Quarrying.
2. Secondary	C. Manufacturing. F. Construction .
3. Tertiary	D. Electricity, gas, steam and air conditioning. E. Water supply, sewerage, waste management and remediation activities. G. Wholesale and retail trade, motor vehicle and motorcycle repairs. H. Transport, storage and communications. I. Accommodation and food service activities. J. Information and Communication. K. Financial and insurance activities. L. Real estate activities. M. Professional, scientific, and technical activities. N. Administration and support service activities. O. Public administration and defence, social security. P. Education. Q. Human Health and social work. R. Arts, entertainment and recreation. S. Other service activities. T. Activities of households as employers; undifferentiated goods and services producing activities of households for own use. U. Activities of extraterritorial organisations and bodies.

Note: the industry categorisation is based on the UK Standard Industrial Classification Activities 2007 (SIC 2007).

³⁴ As used in the 2011 Census