**Armagh, Banbridge & Craigavon**
**Local Development Plan**
**Preparatory Studies**

# Paper 3 : Employment and Economic Development

**March 2015**

DOE

# APPENDICES

## PURPOSE

- The purpose of the paper is to provide the Shadow Council with an overview of the employment and economic development base in the Armagh City, Banbridge and Craigavon 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 review of current economic planning policies within ABC.
- an overview of existing provision and take up of zoned economic development land in the Armagh, Banbridge and Craigavon Area Plans;
- a socio-economic profile of the Armagh, Banbridge and Craigavon District;
- an assessment of the number of new jobs required and how this can be translated into future economic land requirements;
- options on how future economic growth could be accommodated across the district; and
- a summary of key findings; and

# 1.0 INTRODUCTION

**1.1** This is the third of four papers aimed at:

a) building the capacity of members to make informed planning decisions, particularly within the plan making context;
b) providing baseline information which will inform planning policy making at local level; and
c) linking with important ongoing work in relation to the development of a Community Plan and other strategic work undertaken by the Council.

**1.2** The purpose of this paper is to inform the members for Armagh, Banbridge and Craigavon on how the provision of employment/economic development land will be addressed 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 an examination of 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. 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 RDS and the Strategic Planning Policy Statement.

## 2.0 REGIONAL POLICY CONTEXT

**2.1** The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they pertain to plan making and economic development is provided in the following sections:

(a) Regional Development Strategy
(b) Regional Planning Policy Statements
(c) European Legislation
(d) Other Relevant Government Strategies

**(a) Regional Development Strategy**

**2.2.** The RDS 2035 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.

**2.3** The quality and viability of sites zoned for economic development uses in Area Plans should be assessed against an Employment Land Evaluation Framework (see Appendix 1) which will enable planning authorities to identify robust and defensible portfolios of both strategic and locally important employment sites in their 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 Hubs (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 which can provide further jobs and opportunities in rural areas as long as they are integrated appropriately within a settlement or rural landscape.

**2.4** The three Main Hubs also have an important role in relation to training and employability with Main Further Education Campuses located in

Armagh, Banbridge and Portadown/Lurgan. It is important that the courses / training on offer provide the skills required to take up the jobs on offer.

**(b) Regional Planning Policy Statements**

**2.5** The RDS is complemented by the DOE's Planning Policy Statements, the most relevant of which is Planning Policy Statement (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) 2004.

**2.6** The Draft Strategic Planning Policy Statement (SPSS) does not introduce any significant changes to economic development policy contained in PPS 4 but helps to shorten and simplify the guidance for Councils.It will set the directions for Councils to bring forward detailed operational policy within the new Local Development Plan (LDP).
Both PPS 4 and Draft SPSS set regional policy objectives for economic development which are to:-

a) promote sustainable economic development in an environmentally sensitive manner;
b) 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, size and location;
c) sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
d) support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
e) promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and
f) ensure a high standard of quality and design for new economic development.

**2.7** The draft SPPS reiterates the role for LDPs to ensure that there is an ample supply of suitable land available to meet economic development needs on a range and choice of sites in terms of size and location to promote flexibility. Account should also be taken of factors such as accessibility to all members of the community, availability of adequate infrastructure, specialised needs of specific economic activities, potential environmental impacts and compatibility with nearby uses. LDPs should also where possible 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.

**2.8** The Draft 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, or where the proposal is for a major industrial development and a countryside location is necessary due to its size or site requirements.

**2.9** The Draft SPPS also 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. The rural policy approach is to cluster,consolidate, and group new development with existing established buildings and the reuse of previously used land and buildings. Local policies and proposals may be brought forward in the LDP which address development such as farm diversification, agriculture and forestry development, tourism/holiday accommodation; re-use/conversion of existing buildings.

**2.10** 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 draft 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 at a later date. Town centres also provide employment and a new strategic policy for town centres and retailing is contained in the draft SPPS. The role of town centres will be explored in the next paper.

**(c) European Legislation**

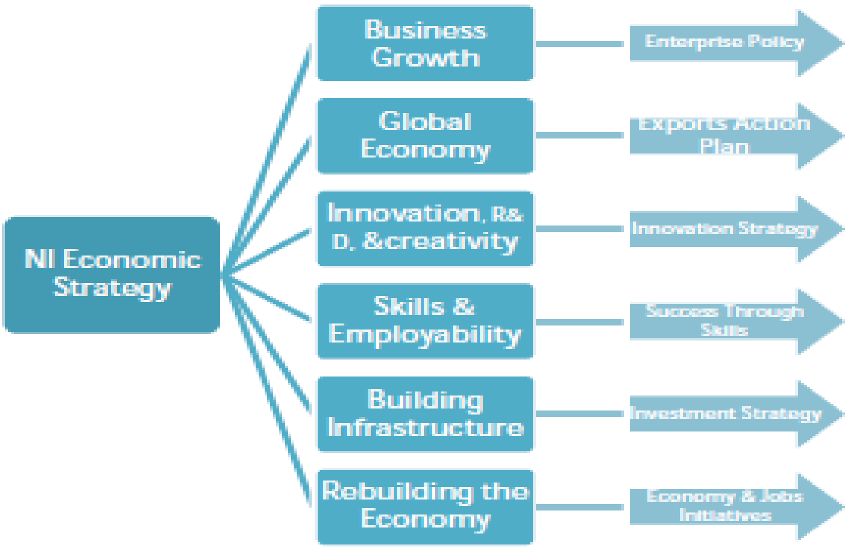
**2.11** Directive 96/82/EC, known as the Seveso II Directive, was implemented in Northern Ireland by the Control of Major Accident Hazards (COMAH) Regulations (NI) 2000 and the Planning (Control of Major-Accident Hazards) Regulations (NI) 2000. Article 12 of the Directive refers specifically to land-use planning. The aim of this Article is to prevent major accidents at sites where processes that involve hazardous materials are used. Limiting the consequences of such accidents is taken into account in preparing land-use planning policies and under Article 12 the Department is obliged to set up appropriate consultation procedures to facilitate implementation of the above Regulations.

**2.12** The determination of planning permission for such proposals is subject to the current regional policies, planning policy statements and in particular Development Control Advice Note 12 (DCAN 12) – Planning Controls for Hazardous Substances.

**(d) Other Relevant Government Strategies**

**2.13** (*i) Northern Ireland Executive – Economic Strategy for Sustainable Growth and Prosperity (March 2012)*
Based on the Executive's vision and priorities for sustainable economic growth and prosperity, the overarching goal of the Strategy is to improve the economic competitiveness of the Northern Ireland economy, with particular focus given to export led economic growth and a shift away from the traditional dependence on the public sector. The Economic Strategy also promotes innovation, research and development and workforce skills as key drivers. Within the Economic Strategy emphasis is also placed on the need to rebalance the economy towards a higher value added private sector activity, as well as outlining actions and investments to aid the rebuilding of the local economy.

**Figure 1: Key areas for action within NI Economic Strategy**




**2.14** In terms of developing economic infrastructure the long terms goals for the region are developing an efficient transportation system, investing in telecommunications to improve capacity as digital and knowledge based economies and the improvement of public infrastructure such as social, health and educational facilities. While it is the responsibility of many Departments to implement the Economic Strategy, these particular goals are areas in which land use planning can have an active part in ensuring the delivery thereof.

**2.15** However, a key challenge to the Northern Ireland economy relates to the public sector dominance of it; public spending underpins the bulk of the economy and almost one third of workforce jobs are in the public sector. The domination of the service sector combined with high unemployment and economic inactivity is a further challenge.

**2.16** *(ii) Anti-Poverty and Social Inclusion Strategy*

The Government's "Anti-Poverty Strategy" (Lifetime Opportunities) was published by the OFMDFM in 2006. It outlines a set of ambitious and challenging long-term goals and targets to work towards eliminating poverty and social exclusion in Northern Ireland by 2020. Public policy in general is expected to take account of anti-poverty/social inclusion considerations, for example through enabling disadvantaged groups and communities to benefit from better access to employment opportunities. One of the main functions of a development plan is to facilitate development and create a land use framework that will allow investment to take place. For instance, the re-use of previously developed land has an important role to play not only in the supply of sites for economic development, but it can also help to support the Anti-Poverty and Social Inclusion Strategy, and assist with economic regeneration and physical renewal, helping to stimulate enterprise in the most disadvantaged areas in order to tackle long-term unemployment and issues of employability.

## 3.0 A SOCIO-ECONOMIC PROFILE OF ARMAGH-BANBRIDGE-CRAIGAVON

**3.1** This section provides an overview of the employment and economic base of the Armagh-Banbridge-Craigavon 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 2023[1]. 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 Economy 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.[2]

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

1 Oxford Economics. Northern Ireland Economy in Transition: Future Drivers, Challenges, Impacts and issues for Policy Consideration.
2 Northern Ireland Centre for Economic Policy (NICEP), Outlook:Spring 2014

**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 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 to contribute towards a stable and competitive employment rate of 70% by 2023. Factors identified within Enabling Success - A Strategic Framework for reducing economic inactivity in Northern Ireland (2014) – 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 provision[3].

[3] Enabling Success – A Strategic Framework for reducing economic inactivity in Northern Ireland. DELNI and DETI.

**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 businesses. 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%.

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

**The Existing Employment Base in Armagh-Banbridge-Craigavon**

**3.6** Employment may be classified into three sectors primary, secondary and service/tertiary as detailed in Appendix 6. The primary sector includes agriculture, forestry and the extraction of 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.

**3.7** In the period 2001 to 2011, the employment sector pattern of the three districts generally reflected the Northern Ireland trend of a fall in the primary sector and an increase in the tertiary sector (Table 1 & Figure 2). Both Armagh and Banbridge have a higher percentage of employment in the primary sector than the regional average reflecting a strong agricultural sector. Conversely, Craigavon remains below the average NI percentage of employment in the primary sector. DARD statistics for 2013 indicate that Armagh has the third largest agricultural labour force in Northern Ireland (3,767), representing 7.88% of the total NI agricultural labour force, whilst Banbridge (2,088) accounts for 4.37% of the NI agricultural labour force and Craigavon one of the lowest (1,325) accounting for only 2.77% of the regional total of 47,796. However, changes in farming suggest that employment in the primary sector could continue to decline, resulting in a greater number of people looking for employment in the secondary and tertiary sectors. The

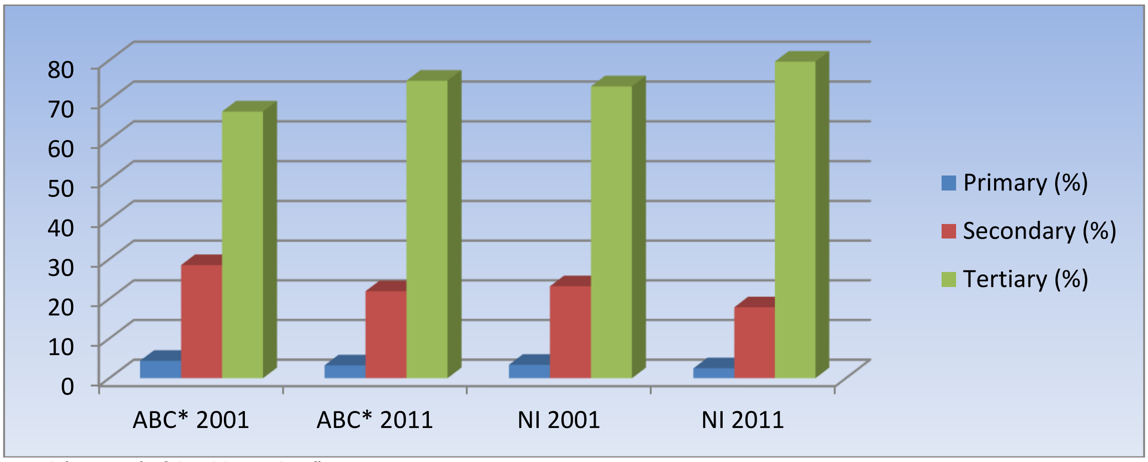
percentage of people in ABC working in the mining and quarrying industry is slightly above the regional average (0.25%) with this work area most important in Armagh and Banbridge and less so within Craigavon.
Source: NISRA/Census 2011 (Table KS605NI).

### Table 1: ABC Employment by Sector in 2011.

| Sector | Armagh | Banbridge | Craigavon | ABC* | NI |
|---|---|---|---|---|---|
| Primary | 1456 (5.48%) | 816 (3.61%) | 645 (1.56%) | 2917 (3.22%) | 19794 (2.49%) |
| Secondary | 5427 (20.41%) | 4589 (20.29%) | 9821 (23.77%) | 19837 (21.91%) | 142131 (17.87%) |
| Tertiary | 19703 (74.11%) | 17216 (76.11%) | 30854 (74.67%) | 67773 (74.86%) | 633338 (79.64%) |

Source: NISRA 2011/Industry of Employment: KS605NI (administrative geographies)
* ABC is a basic total of 3 x 2011 LGD figures.

### Figure 2: Illustration of Employment Sectors in NI and ABC in 2001 & 2011




* ABC is a total of 3 x 2011 LGD figures.

**3.8** The new Armagh City, Banbridge & Craigavon Council Area has a diverse employment base with each area containing a significant amount of public sector jobs in health, education and central/local government aswell as wholesale and retail trade. This reflects the three hubs importance as a major administrative and service centres for their catchment and provider of educational and health services and a range of government departments. Craigavon which is located within 30 minutes of Greater Belfast has a strong manufacturing/logistics base and has three distinct yet complementary town centres of Portadown, Craigavon and Lurgan. Armagh traditionally had a strong agriculture, education, health/social and defence sector but this job offer has been affected by cut-backs in recent years and changes to the job market. Armaghs' potential for growth in the tourism market with its strong cultural and heritage base is an area that can be developed further with projects such as the hotel /heritage centre development of Armagh Gaol. Banbridge is located on the A1/M1transport corridor between Belfast and Dublin and is considered an attractive location to live with a strong retail base but it is estimated that over 40% of working people living in Banbridge commute out of the area to work.
(Source: The Business Environment & Wider Profile of the BDC Area - April 2012).

**3.9** Craigavon Urban Area has extensive areas of economic land at Seagoe (Portadown), Carn & Charlestown Road (Central Craigavon), Silverwood (Lurgan) and at a number of other smaller locations. Major Craigavon employers include Moy Park & Irwins Food Companies, Almac Pharmaceuticals, Ulster Carpet Mills, Turkingtons Construction and Clearway Recycling. Traditional employers such as Irwins have vacated their town centre base in Portadown and relocated to Carn Industrial Estate whilst Dennys foods have scaled down significantly with the majority of their former factory at Obins Street, Portadown lying vacant. The main areas of economic land in Banbridge are at Scarva Road, Cascum Road and Rathfriland Road in Banbridge Town which include major employers such as Gordons Chemist Distribution Centre, the Outlet Centre and Fane Valley Creamery. The site of the former Shoe Factory at Newry Road, Banbridge has closed down and been developed for housing. The main areas of economic land in Armagh are at the Loughall Road, Hamiltonsbawn Road and Newry Road, Armagh City. These sites include major employers such Bunzl-McLaughlin Catering Supplies, Linwoods Bakery, Cross Group and the SELB HQ. Drumadd Army Barracks site (5.8ha), Hamiltonsbawn Road in Armagh has closed and is currently being redeveloped as Armagh Business Park. This will offer further opportunities for development of employment sites within Armagh and would benefit from the development of the adjacent East Link Road as proposed in the Armagh Area Plan 2004 which would link the Portadown Road (onwards to Belfast) to the Newry Road (onwards to Dublin). Connectivity and accessibility of zoned sites are important in relation to their success and attractiveness.

**3.10** Overall, Armagh-Banbridge-Craigavon shows a spread of jobs across the three sectors in line with the whole region albeit with a higher proportion of jobs within the primary and secondary sectors, as may be expected in an area containing a large rural element and containing Craigavon with its strong manufacturing base. 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.

**3.11** The September 2013 NI Census of Employment states the proportion of public sector employee jobs within the combined ABC (LGD 2014) is approximately 20,000 (29%) with approximately 48,000 private sector jobs (71%). This is slightly lower than the NI average of 31% public sector employee jobs.

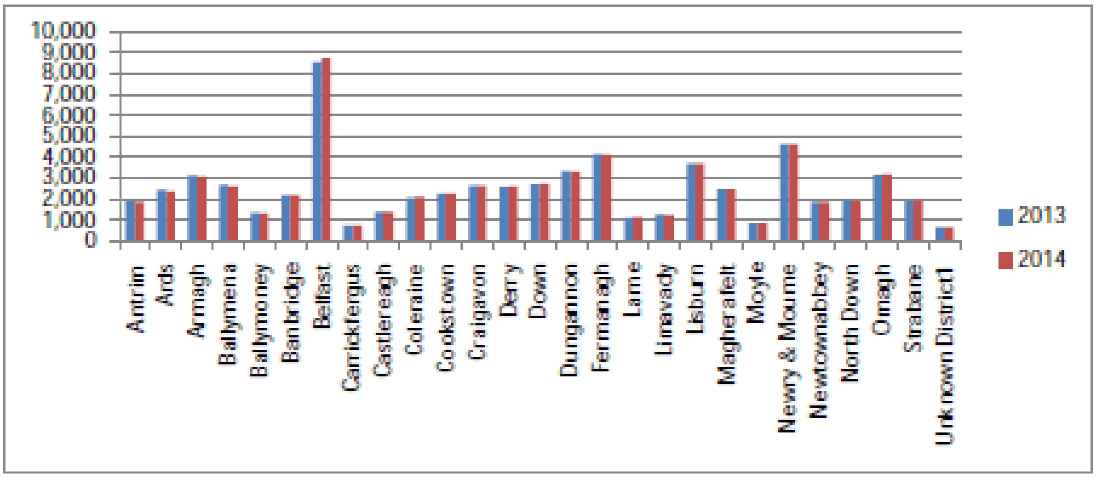
**3.12** NISRA 2013 tourism statistics in states that ABC receives approximately 197,000 trips by all visitors who spend approximately £21,945,000. This may sound impressive but in relation to the existing 26 NI LGDs, Armagh is 19$^{th}$ in terms of visitor trip numbers and 18$^{th}$ in terms of visitor expenditure. This highlights that Armagh has significant potential for tourism expansion, considering its low visitor base and strong tourism offer. Banbridge is 25th in terms of visitor trips and 22nd in terms of visitor expenditure, whilst Craigavon is 12th in terms of visitor trips but 16th in terms of visitor expenditure which suggests that a high proportion of visits are day trips to locations such as Oxford Island. Clearly, there is significant room for expansion when you consider that the total for ABC visitor trips is only 4.7% of the NI total and just 3% of the NI total visitor spend. In relation to potential, it is worth considering that Belfast and Lisburn which are connected to ABC by motorway attract over 34% of total NI visitor expenditure. The Councils Regeneration & Development Strategy 2015 acknowledges that the ABC Council area is underperforming in the tourism area at present and that a real opportunity exists to advance up the tourism league table. The new LDP can tailor specific policies to help safeguard the Council tourism assets from inappropriate development or identify potential tourism growth areas.

## Business Stock

**3.13** In terms of business stock, as of 2014 there were 7,720 active VAT/PAYE registered businesses in the Armagh-Banbridge-Craigavon council area (11.4% of the Northern Ireland total). Of this number, 29% are in the agricultural, forestry and fishing sectors, the 5th 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 (78.2%) compared to the regional average 75.6%. This illustrates the importance of small businesses and the self-employed in the local economy. However within ABC, there is a lower incidence of registrations in the service (tertiary) sector such as finance and insurance, professional & scientific and ICT than the NI average. The number of VAT and/or PAYE registered businesses in Armagh has fluctuated from a peak of 3230 in 2009 to 3085 in 2014. The figures for Banbridge follow a similar pattern with a high of 2280 in 2009 to 2165 in 2013. It is positive to consider that 15 more businesses have been registered in Banbridge in the period 2013-2014[5]. The figures in Craigavon are consistent with Armagh and Banbridge in that the number of registered businesses peaked in 2008 (2890) with but has fallen continuously to 2014 when 2640 businesses were registered. It is also noted that there has been a higher rate of business deaths in both districts compared to business births post-2008.[6]

4 NISRA
5 ibid
6 DETI: www.deti.gov.uk/stats -Inter Departmental Business Register / Business Demography.

**Figure 3: No. of VAT and or PAYE registered Businesses Operating in Northern Ireland by LGD 2014**[7]




Note: 'Unknown District' – A small number of companies could not be traced to an LGD and these figures have been included in the NI figure.

Source:http://whttp://www.detini.gov.uk/idbr_publication_edition_17_updated_jan_2015.pdf?rev=0ww.detini.gov.uk/idbr_publication_edition_17_updated_jan_2015.pdf?rev=0

## Economic Activity

**3.14** The number and percentage of economically active persons in Armagh, Banbridge and Craigavon has steadily increased between 1971 and 2011. The combined ABC Councils are marginally above the NI average levels of economic activity for 1971, 2001 & 2011 (See Table 2). There has been a notable change in the three districts activity levels over the last 40 years. In 1971, Banbridge District had economic activity levels similar to the regional average and below Craigavon but in 2001 & in 2011, it had levels of economic activity significantly higher than NI or Armagh/Craigavon Districts.This may be explained by the change in Banbridge demographics over the period to a higher percentage of working age between 2001 and 2011. Craigavon 'New Town' was rapidly developing an industrial base in 1971 with the Goodyear Factory the largest complex in Europe and this is reflected in the high economic activity levels at the time (61.66%). In recent years, the borough does not enjoy as healthy economic activity levels as in 1971 but is still marginally above the regional average. Armagh had the lowest level of economic activity of the three councils in 1971 and below the NI average but has improved to be slightly above the NI average and above the Craigavon figure in 2001 and 2011. 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 3i). Research by DETI (2014) confirms that 47% of those aged 16-64 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. If these trends continue, more women are likely to enter the employment market over the plan period.

**Table 2: NI & ABC Economic Activity Levels (1971, 2001 & 2011)**

| | 1971 (%) | 2001 (%) | 2011 (%) |
|---|---|---|---|
| **NI** | **57.1** | **62.27** | **66.22** |
| **ACDC** | **54.84** | **62.94** | **67.96** |
| **BDC** | **57.97** | **67.04** | **70** |
| **CBC** | **61.66** | **62.30** | **67.12** |
| **ABC*** | **58.67** | **63.63** | **68.05** |

**Source: NISRA/1971, 2001 & 2011 Census Reports**
***ABC figure is total of 3 Council 2011 NISRA figures.**

**3.15** In Northern Ireland, a total of 402,000 women were economically active in April - June 2014, an increase of 12,000 from June 2013. The NI economic activity rate of working age females was 66.8%, 5.6 percentage points lower than that in GB (72.4%).The NI economic activity rate of working age females (66.8%) 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 five years ago when the difference was 13.5 percentage points [8]. In terms of the employment makeup of the two genders, almost 70% of females in ABC work in the areas of administration & secretarial, professional, caring & leisure or sales & customer service. In contrast, over 60% of males are employed in the areas of managers & directors, professional & technical, skilled trades or process/plant/machine operatives. Approximately 53% (19,000) of women in Armagh, Banbridge & Craigavon are in part-time jobs compared to approximately 26% (8,000) of men.[9]. The predominance of females in part-time work is reflected in the 2013 gross average weekly wage for the three districts where woman were paid a lower average gross weekly wage to men. Armagh: £308.70 vs £464.40, Banbridge: £333.10 vs £371.30 and Craigavon: £347.10 vs £502.40.[10]

8 http://www.detini.gov.uk/women_in_northern_ireland_2014.pdf?rev=0
9 DETI Census of Employment 2013
10 http://www.ninis2.nisra.gov.uk/public/Theme.aspx?themeNumber=18&themeName=Labour%20Market

**Table 3(i): Economically Active ABC Males & Females 1991, 2001 & 2011 (%)**

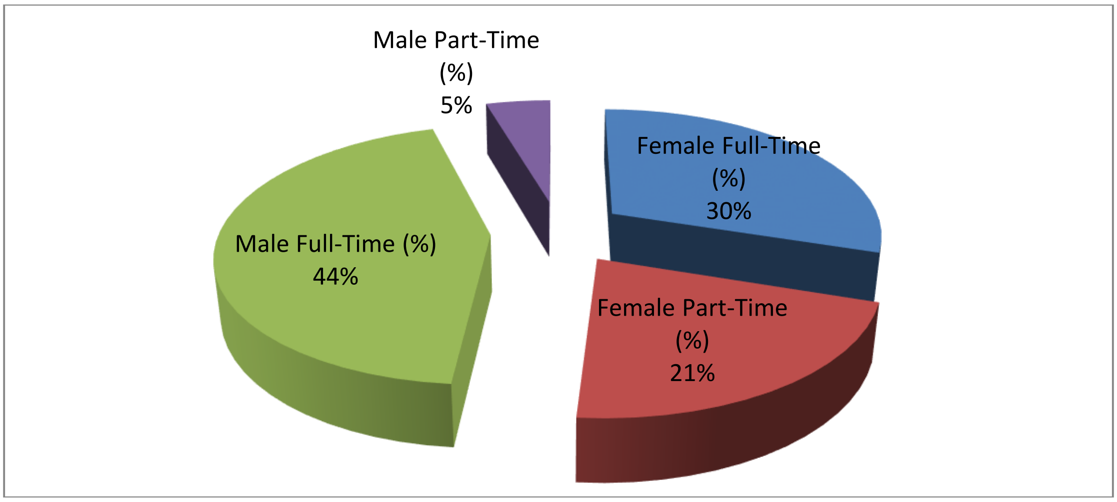
| | 1991 | | 2001 | | 2011 | |
|---|---|---|---|---|---|---|
| **Area** | **Male (%)** | **Female (%)** | **Male (%)** | **Female (%)** | **Male (%)** | **Female (%)** |
| **NI** | 72.73 | 45.22 | 70.88 | 53.98 | 71.18 | 61.4 |
| **Armagh** | 71.62 | 44.27 | 71.58 | 54.26 | 73.22 | 62.63 |
| **Banbridge** | 74.41 | 46.67 | 75.86 | 58.17 | 75.17 | 64.82 |
| **Craigavon** | 74.75 | 47.87 | 71.46 | 53.44 | 72.57 | 61.79 |

Source: 1991, 2001 & 2011 Census

**3.16** A significant risk to employment levels in Armagh-Banbridge-Craigavon is the high number of jobs currently in the public sector. Each of the three ABC Hubs function as regional/district service centres with a concentration of public sector jobs within Health, Education, the Police Service for Northern Ireland and various other government Departments. The level of employment in ABC within the main public sector areas (ie public administration & defence, education, health & social work) in 2013 was just under 30% of the overall total at 20,035 people.10a. The NI Executive has made it clear that the significant cuts to Departmental budgets will result in significant job losses. It has been suggested that this could mean cuts of approximately 13% of civil servant posts by 2017 which equates to an estimated loss of public sector jobs of approximately 2600 posts in ABC.10b. Given the predominance of women within public sector in areas such as health and education in Armagh-Banbridge-Craigavon 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 Armagh-Banbridge-Craigavon area.

10a Source: Source : NI Census of Employment, September 2013
10b Source: BBC:Stormont announcement /Colin Lewis (NICS) – 25 Feb 2015

**Figure 4: Percentage of part-time and full-time jobs in ABC by gender**




Source: DETI Census of Employment 2013

## Unemployment

**3.17** Armagh, Banbridge and Craigavon experienced a significant increase in unemployment between 1971 and 1981, mirroring the Northern Ireland trend (Figure 5). The unemployment rates in 1991 remained similar to 1981 with small reductions in the rate over the 10 year period. However, there has been a dramatic reduction in the unemployment rates since 1981/1991 with the Census in 2001 indicating rates of 6% (ACDC), 5%(BDC) and 6% (CBC) unemployment rate for the respective districts. The rate of unemployment has continued to fall from 2001 to 2011 but this figure should be treated with caution as the 2011 means of calculating the rate is based on the claimant count and varies from the means 1971-2001. The two types of measuring unemployment is detailed in Appendix 7.

**Figure 5: NI & ABC Unemployment Rates 1971-2011**

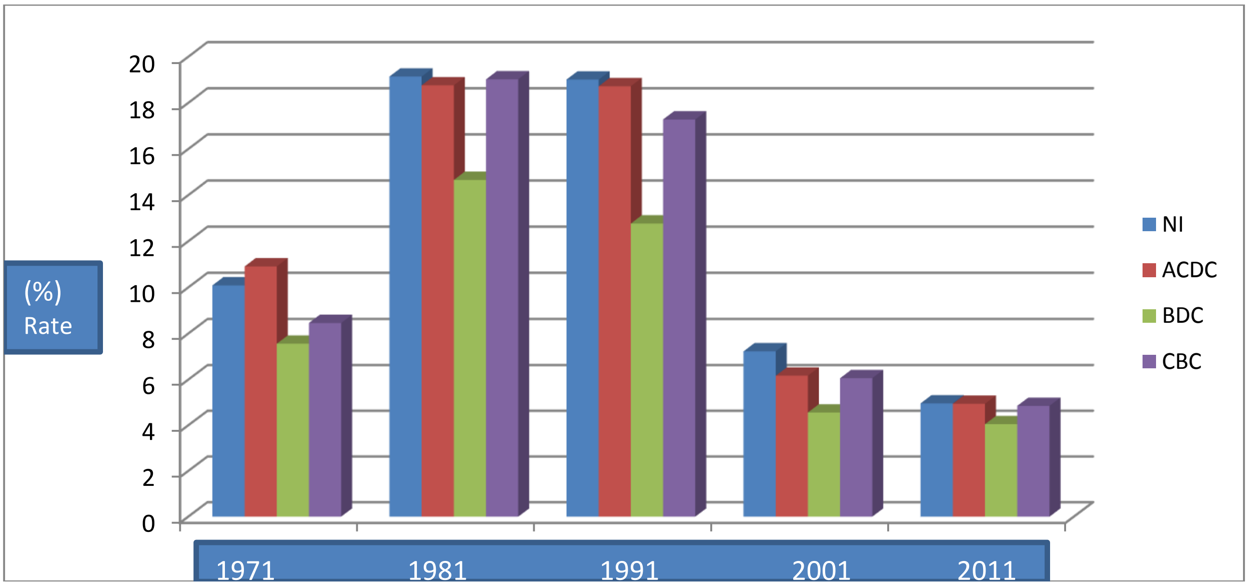



**Table 3(ii): NI & ABC Unemployment Rate Average 1971-2011**

| Unemployment Rate (%) by Year | 1971 | 1981 | 1991 | 2001 | 2011 |
|---|---|---|---|---|---|
| NI | 10.09 | 19.14 | 19.01 | 7.23 | 4.96 |
| ACDC | 10.91 | 18.76 | 18.72 | 6.17 | 4.94 |
| BDC | 7.56 | 14.66 | 12.77 | 4.56 | 4.05 |
| CBC | 8.46 | 19.02 | 17.28 | 6.06 | 4.85 |

Source: NISRA Census 1971, 1981, 1991, 2001 & DETI Claimant Counts 2011.

**3.18** Figures for traditional unemployment rates are not available at district level after 2001 and therefore the number of persons claiming benefit may be used as a guide. Claimant count rates suggest that unemployment further declined after 2001 with the lowest rates recorded in the three districts in 2007 which were all under the Northern Ireland average (2.1%). Since then, unemployment rose steadily as a result of the economic recession (Figure 6). Monthly claimant figures for 2013 are showing a slight reduction in claimant counts with numbers for ABC coming in just below the regional average. The seasonally adjusted number of people claiming unemployment related benefits in Northern Ireland stood at 49,577 (4.2%) in January 2015 significantly above the UK average of 2.5% [11]. This corresponds to claimant counts of 1,249(3.3%), 839 (2.7%) and 2463 (4.1%) for Armagh, Banbridge and Craigavon.

11 http://www.detini.gov.uk/labour_market_report_-_February 2015__final_-2.pdf?rev=0

**Figure 6: Trends in Claimant Counts NI & ABC 2001-2013**

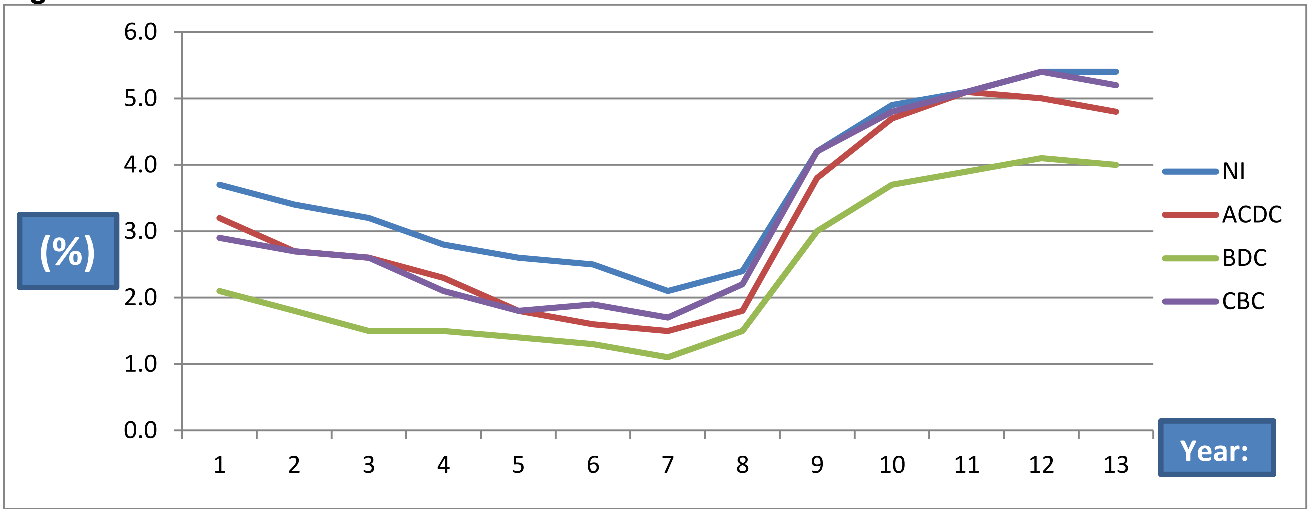



**Table 4: NI & ABC Claimant Count Annual Averages 2001-2013**

| LGD Claimant Count Annual Averages (%) | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **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 |
| **ACDC** | 3.2 | 2.7 | 2.6 | 2.3 | 1.8 | 1.6 | 1.5 | 1.8 | 3.8 | 4.7 | 5.1 | 5.0 | 4.8 |
| **BDC** | 2.1 | 1.8 | 1.5 | 1.5 | 1.4 | 1.3 | 1.1 | 1.5 | 3.0 | 3.7 | 3.9 | 4.1 | 4.0 |
| **CBC** | 2.9 | 2.7 | 2.6 | 2.1 | 1.8 | 1.9 | 1.7 | 2.2 | 4.2 | 4.8 | 5.1 | 5.4 | 5.2 |

Source: NiSRA 2011 Census/Claimant Count Annual Averages (administrative geographies)

**3.19** Whilst unemployment has clearly fallen from the period in the 1980s-1990s, it is more difficult to determine trends from 2001 to the present day due to the change of measuring unemployment levels. Therefore, if we look at the number of persons claiming benefit (ie claimant count) as a consistent means of measuring recent levels since 2001, we can compare ABC trends (See Figure 6 & Table 4). The three Councils remain below the NI average throughout the period (2001-2013) with 2007 marking the lowest levels of claimant count (%) for Armagh, Banbridge and Craigavon, before reaching a peak in 2012 post recession, before a slight improvement in 2013. Despite the recent improvement in the percentage claiming benefits, it should be highlighted that in January 2015 there remain localised areas (Wards) of higher unemployment in the main urban areas, for example, Church (8.7%: area between High Street & Mourneview Avenue) or Corcrain (7.9%: area from Corcrain Road to lower Garvaghy Road) in Lurgan and Portadown, Callan Bridge (8.8%: area between Ballycrummy, Killylea and Cathedral Road) in Armagh City and Keady (6.7%) along with The Cut (5.9%:town centre area either side of Bridge Street-Hill Street) in Banbridge Town. Additionally, within the ABC Super output Areas (SOA) Drumnamoe (area between Lake Street and Antrim Road, Lurgan) , Drumgask (area between Moyraverty West Road and Monbrief East Road, Central Craigavon), Drumgor (area between Central Way and Drumgor Road, Central Craigavon) & Corcrain (as above) are within the top 10% most deprived areas in Northern Ireland in the 2010 NI Multiple Deprivation Measure in relation to employment deprivation and education, skills and training.

Skills Profile

**3.20** As stated in paragraph 3.2, it is anticipated that future economic growth will transition towards more exportable service sectors and if Armagh-Banbridge-Craigavon 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.

**3.21** 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 mismatch.[12] 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.

Source: 12 Oxford Economics: Northern Ireland Economy in Transition: Future Drivers, Challenges, Impacts and issues for Policy Consideration.

**3.22** Since 2001, the proportion of people in ABC aged 16 years old and over who had a degree or higher qualification has significantly increased but is still below the NI average of 23.65%. The overall ABC proportion of those aged 16 and over who have no or low qualifications (1-4 O Levels/CSE/GCSE or equivalent) has reduced since 2001 but it is still higher than the regional average (Table 5). A more highly educated workforce with skills to match those emerging employment sectors with export potential is needed.

**Table 5: Qualifications of ABC Population over 16 years of age (2001-11)**

| | Year | Armagh | Banbridge | Craigavon | NI |
|---|---|---|---|---|---|
| **No or low qualifications*** | **2011** | 41.48% | 39.88% | 42.32% | 40.63% |
| | **2001** | (60.68%) | (59.61%) | (62.74%) | (58.86%) |
| **Degree or higher qualification**** | **2011** | 22.23% | 23.28% | 21.12% | 23.65% |
| | **2001** | (13.62%) | (14.37%) | (12.83%) | (15.8%) |

Source: Census 2011, NISRA. Figures in ( ) are for 2001.
* =no or low (1-4 O Levels/CSE/GCSE or equivalent) qualifications

** =a degree or higher qualifications

**3.23** In summary, the main features of the employment situation in Armagh, Banbridge & Craigavon can be summarised as follows:

- The level of economic activity in all three districts has increased over the 30 year period between 1971 and 2011.
- Unemployment levels have started to rise again since 2007-2008 following the current economic downturn.
- 2011 Primary sector employment in ABC (particularly in Armagh) remains higher than the Northern Ireland average, an indication of the importance of agriculture and quarrying. However, the trend in the agricultural sector is towards a decline and this will require the provision of new job opportunities.
- In 2011 the proportion of jobs in the secondary sector is higher in ABC than the regional average (particularly in Craigavon) but has fallen since 2001.
- 2011 Tertiary (Services) employment in ABC has risen from 2001-2011to almost 75% and is expected to continue rising. However this remains lower than the regional average.
- The proportion of economically active females in ABC has increased and the majority of female employees work in administration & secretarial, professional, caring & leisure or sales & customer service roles.
- The number of workers in Banbridge who commute to outside of the district has been estimated at approximately 43%, a significant proportion.
- The majority of ABC males work as managers & directors, professional & technical, skilled trades or process/plant/machine operatives.
- The majority of businesses are classified as being micro, employing less than 5 people (77.9%) compared to the NI average (75.6%) with a corresponding lower percentage of businesses in the +100 band.
- A significant risk to employment levels in Armagh-Banbridge-Craigavon is the dependence of employment in the public sector and the impending cuts.
- 42% of the population have no or low qualifications levels.

# 4.0 EXISTING AREA PLANS & LAND UPTAKE IN ARMAGH, BANBRIDGE, CRAIGAVON

**4.1** This section provides an overview of the industrial & employment policies in the existing plans and the uptake of lands over the plan period.

**4.1** The Armagh Area Plan 2004, Banbridge/Newry & Mourne Area Plan 2015 and Craigavon Area Plan 2010 zoned land for industrial purposes in the main settlements of Craigavon Urban Area (including Portadown, Lurgan & Central Craigavon), Armagh City and Banbridge and the local towns of Keady, Markethill, Tandragee, Dromore, Gilford and Rathfriland. The amounts zoned were considered sufficient to meet overall industrial needs to the end of the respective plan periods at the time of adoption. Some scope for industrial development on ‘whiteland’ was also anticipated with further opportunities for employment provided by mixed business zonings in Banbridge and the restructuring and subdivision of existing or underused industrial premises. Surveys carried out by DoE Planning have identified remaining capacity within the current industrial zonings (See Table 6).

**4.2** The Armagh Area Plan (AAP) 2004 was adopted in January 1995 and along with the AAP 2004 Alteration No 1: Armagh Countryside Proposals is the extant area plan for Armagh City & District.
In relation to industry and employment, the aim of the AAP 2004 is:

- Provide a framework of land use proposals and policies which will allow the area to maximise its full economic potential in an efficient, economic and orderly manner whilst maintaining a high standard of physical environment and safeguarding its landscape quality and natural resources.

To achieve the Plan Aim, the principal employment related plan objectives are:

- To identify land within defined limits in urban areas to meet planned future development requirements in respect of .....industry..;
- To encourage the efficient use of existing infrastructure and make provision for new infrastructure;
- To promote vibrant towns and villages by increasing their attractiveness as places to live, work, use and invest;
- To improve the quality of the urban environment through appropriate Departmental policies and physical regeneration measures; and
- To encourage the development of the District’s tourism potential.

**4.3** In Armagh District just under 37 hectares of Industrial Land were zoned across Armagh City and the local towns of Keady, Markethill and Tandragee in the Armagh Area Plan 2004. Of this 37 hectares, under 5 hectares have been developed for Industry, 17 hectares of zoned industrial land remain undeveloped and just under 15 hectares have been lost due to constraints or developed for non-Industrial uses. The only zoned industrial land developed in Armagh City is 5 ha at Edenaveys which also has 6 ha undeveloped. This is well located off the Newry Road on the INI serviced site. The other two areas are at Mullinure Road (9.7ha) and Loughall Road (4.4ha) which have significant flooding constraints which will discount the majority of these sites, if not all of them (See Appendix 2 & 3). In Keady, 3.38 ha of Industrial Land were zoned at Annvale Road adjacent to the Keady Business Centre. Only three dwellings have been developed across the road frontage of this site, leaving over 3ha available. Markethill had a total of 2.23 ha zoned across three sites. The largest site west of Fairgreen Road is undeveloped while the other two sites at Fairgreen Road East has been developed for social housing and the site at Coolmillish Road has been developed by Alexanders Furniture Showroom, Store and Yard. Tandragee had two sites containing Industrial zoned land at Gilford Street and Glebe Hill Road. The Gilford Street has one dwelling built on it leaving 1.7 ha of land undeveloped. The large 3.7 ha site at Glebe Hill Road adjacent to the old Mill has been partially developed for housing (Glebe Hill Manor) with an old housing approval on the remainder of the site.

**4.4** The Banbridge/Newry & Mourne Area Plan (BNMAP) 2015 was adopted in October 2013 and is the area plan for Banbridge District.
In relation to economic development, the aim of the BNMAP 2015 is:

- to provide a planning framework for Banbridge and Newry and Mourne Districts that is in general conformity with the RDS. This framework will facilitate sustainable growth and a high quality of development in the Banbridge and Newry and Mourne Districts throughout the Plan period whilst protecting and, where appropriate,enhancing the natural and man-made environment.

To achieve the Plan Aim, the principal employment related plan objectives are:

- to facilitate sustainable patterns of growth and development throughout the Plan Area;
- to promote Banbridge and Newry as main hubs within Northern Ireland and to enhance the inter-regional gateway role of Newry;
- to facilitate appropriate development within existing urban areas that will promote urban renaissance, create ease of access to services and community facilities, and to maximise the use of existing infrastructure;
- to facilitate economic development and the creation of employment, taking into account the Government initiative of the Anti-Poverty and Social Inclusion Strategy;
- to promote town centre vitality and viability; and
- to facilitate the promotion of equality of opportunity and good relations between persons of different religious belief, political opinion or racial group.

The BNMAP Plan Strategy includes the requirement to:

- Designate additional industrial land to make provision for an adequate supply and choice of sites for employment uses that takes account of accessibility to major transport routes and the provisions of the RDS, including the proximity to the district population, particularly in areas of economic and social deprivation.

**4.5** In Banbridge District, over 50 hectares was zoned for Economic Development and 34 hectares zoned as Mixed Use in the Banbridge/Newry & Mourne Area Plan 2015 as adopted October 2013. Mixed Use Sites are zoned outside of town centres where it is desirable to permit a degree of flexibility in the final use of the site, allowing for a range of uses. Of the Economic Development land, over 32 hectares are zoned at the two sites in Banbridge at Cascum Road and Rathfriland Road. No development has occurred to date at these sites although permission was approved at Cascum Road for Industrial units, a call centre, warehousing and distribution units. Four Economic Development sites were zoned at Dromore totalling over 16 hectares of land. Of these sites, only 0.75 ha have been developed for Economic Development at Quillyburn South. In Rathfriland, a site has been zoned at Loughbrickland Road and is undeveloped. In relation to the Mixed Use sites, two have zoned in Banbridge, at cascum Road North and South. The large Cascum Road North site (24.51 ha) has been developed for the Outlet Centre with approximately 2ha undeveloped. The smaller Cascum Road South site (5.14ha) is currently undeveloped but is partially covered by planning approvals associated with the Outlet Centre. Gilford Mill is another Mixed Use zoning but has not been developed and the site lies vacant. At Scarva Main Street, a small Mixed Use zoning site (0.62ha) has been unzoned and is also undeveloped.

**4.6** The Craigavon Area Plan (CAP) 2010 was adopted in August 2004 and along with the Craigavon Town Centre Boundaries & Retail Designations Plan 2010 adopted in June 2008 is the extant area plan for Criagavon Borough. In relation to economic development, the aim of the CAP 2010 is:

- To provide a planning framework which facilitates the future growth and development of Craigavon Borough whilst protecting and, where appropriate, enhancing the natural and man-made environment and ensuring that development is both sustainable and of a high quality.

To achieve the Plan Aim, the principal employment related plan objectives are:

- the encouragement and facilitation of sustainable patterns of development;
- the most efficient use of existing infrastructure, buildings and transportation systems;
- the integration of land use and transportation to reduce congestion and the need for car journeys and encourage a shift towards more sustainable modes of transport, including walking and cycling; and
- facilitating the achievement of the Borough's economic potential.

Key factors in preparing the CAP Plan Strategy include:

- the recognition of the sub-regional significance of Craigavon Urban Area;

- reinforcement of the role of Craigavon Urban Area as a major service centre for urban and rural communities;
- the high growth potential of Craigavon Urban Area, reflecting its role as the major service centre in mid-Ulster, the second largest industrial centre in the Region and its strategic location on the key transportation corridors; and
- the facilitation of the development of employment generators.

**4.7** In Craigavon Borough, over 180 hectares of land was zoned for Industry (both Industrial Zonings & Light Industry & Warehousing Zonings) and a further 5 hectares zoned as Development Opportunity Sites (DOS) which allow specific employment uses in the Craigavon Area Plan 2010. These 185 hectares are all within the Craigavon Urban Area across Portadown, Central Craigavon and Lurgan. A small site has also been zoned at The Birches for Community /Business Use. Within Central Craigavon, 8.16 ha have been developed east of New Charlestown Road and 5.94 hectares developed for non-industrial uses east and west of Charlestown Road. The site at Mandeville Road is totally undeveloped but INI have developed a central spine road and lighting for future development. Within Lurgan, 6.7 hectares of land have been developed for industry at Halfpenny Valley Industrial Estate. There are four sites zoned for Light Industry and Warehousing at Silverwood, Lurgan totalling 23 hectares which also have not been developed. The DOS sites at Curran Street, Portadown and Legahory District Centre, Craigavon allow business units but no business / employment uses have been developed. Approximately 0.35ha of the 3ha site at Legahory is in use as a travellers caravan site and 0.81ha of Curran Street (2.27ha) is under construction for social housing.

**4.8** In relation to Existing Employment / Existing Industrial lands within ABC, approximately 35 hectares (ha) are in use in Armagh City including the new Armagh Business Park on the site of the old Drumadd Army Barracks on Hamiltonsbawn Road. Small portions of existing industrial land remain undeveloped or have vacant employment units throughout Armagh and Banbridge. Keady has approximately 4 ha, Markethill 5 ha and Tandragee 8ha in use/available. Banbridge Town has approximately 16 ha of existing employment lands and 30ha of Mixed Use land in use / available. Dromore has 3.5ha of existing employment land in use / available, Rathfriland 2.4 ha and Gilford approximately 5ha including the Mixed Use Mill zoning. Within Craigavon Urban Area, over 360 hectares of existing Industry/employment land is in use or available, with approximately 130 ha in Portadown, 100 ha in Central Craigavon and 130 ha in Lurgan. Within the 360 hectares in the Craigavon Urban Area, significant portions are undeveloped or have vacant employment buildings.

**Table 6: Summary of land zoned for industry/Economic Development in Armagh-Banbridge-Craigavon January 2015**

| Settlement | Total Area Zoned (Hectares) | Area Developed (Hectares) | Average Area Developed per year (Hectares) | Area lost or discounted (ha)* | Area Remaining (Hectares) |
|---|---|---|---|---|---|
| **Armagh Area Plan 2001: Adopted January 1995=20 years.** | | | | | |
| Armagh City | 25.37 | 4.72 | 0.24 | 11.5 | 9.15 |
| Keady | 3.38 | 0 | 0 | 0.3 | 3.08 |
| Markethill | 2.23 | 0 | 0 | 1.16 | 1.07 |
| Tangragee | 5.65 | 0 | 0 | 1.95 | 3.7 |
| ACDC Total | 36.63 | 4.72 | 0.24 | 14.91 | 17 |
| **Banbridge/Newry & Mourne Area Plan 2015: Adopted October 2013=1.33 years.** | | | | | |
| Banbridge Town | 32.33 | 0.75 | 0 | 0 | 31.58 |
| Dromore | 16.32 | 0 | 0 | 0.78 | 15.54 |
| Rathfriland | 1.54 | 0 | 0 | 0 | 1.54 |
| BDC Total ** | 50.19 | 0.75 | 0.56 | 0.78 | 48.66 |
| **Craigavon Area Plan 2010: Adopted August 2004=10.42 years.** | | | | | |
| Craigavon Urban Area *** | 180.49 | 14.86 | 1.43 | 5.94 | 159.69 |
| CBC Total | 180.49 | 14.86 | 1.43 | 5.94 | 159.69 |
| **ACBC Total** | **267.31** | **20.33** | **2.23** | **21.63** | **225.35** |

Source: DoE Planning Survey (January 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).
** No zoned employment land in Gilford.
*** Craigavon Urban Area contains Portadown, Central Craigavon & Lurgan.

**4.9** The majority of industrial development in Armagh and Banbridge has been for light industry (The Planning (Use Classes) Order (Northern Ireland) 2004 - UCO Use B2) and storage & distribution (UCO B4), whilst in Craigavon there has also been a significant amount of general industrial development alongside the UCO B2 & B4 uses.
There are also a number of business / enterprise centres within ABC made up of smaller purpose built units:
Armagh City & District Council:

- Armagh Business Centre, Armagh City;
- Keady Business Centre, Keady; and
- Markethill Business Centre, Markethill.

Banbridge District Council:

- Banbridge Enterprise Centre, Scarva Road, Banbridge;
- Banbridge Business Centre, Scarva Road, Banbridge; and
- Rathfriland Enterprise Centre, Rathfriland.

Craigavon Borough Council:

- Mayfair Business Centre, Portadown;

- Brownstown Business Centre, Portadown;
- Craigavon Innovation & Development Office (CIDO) Charles Street, Lurgan;
- Craigavon Innovation & Development Office (CIDO 1) Carn, Craigavon;
- Craigavon Innovation & Development Office (CIDO 2) Carn, Craigavon;
- Craigavon Innovation & Development Office (CIDO Innovation Centre) Charlestown Road, Craigavon; and
- Bluestone Business Centre, Brownlow, Craigavon.

These uses are in keeping with PPS4, which in the main promotes zonings for industry and mixed business uses. However, some non conforming uses have occurred such as individual retail uses in Carn,Craigavon,residential uses at Glebe Hill, Tandragee and retail at the Mixed Use Outlet Centre site.

**4.10** Existing industrial land that are is zoned in the Plan such as Ex-Drumadd Army Barracks site, Armagh; Mayfair /BrownstownBusiness Centre, Portadown; and Seapatrick Industrial site, Banbridge along with other individual industrial sites are not currently safeguarded as part of the land supply for economic development needs. The new Local Development Plan can protect existing economic development land where it remains suitable for continuation or expansion of this use.

# 5.0 THE NEED FOR FUTURE EMPLOYMENT OPPORTUNITIES

**5.1** This section considers the existing makeup of the employment sectors and presents a number of methodologies to estimate the future employment requirement within ABC to 2030.
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.

**5.2** 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 2001 and 2013.

*(a) Method 1- based on the amount of land developed to date*
**5.3** The average take up of land zoned in the Armagh Area Plan 2001 since adoption in 1995 is 0.24 hectares per annum (See Table 6), suggesting that approximately 4 hectares will be needed up to 2030 (ie 16 years from 010115-311230). Theoretically there is sufficient land zoned in Armagh Area Plan to meet demand past 2030 based on past rates of uptake. In the Banbridge/Newry & Mourne Area Plan 2015, the average take up of land zoned for industry (including mixed business zonings) has been 0.56 hectare per annum from Oct 2013 to January 2015 (See Table 6), suggesting some 9 hectares will be needed up to 2030. Theoretically, there is sufficient land zoned in Banbridge to meet demand past 2030 based on past rates of uptake. The average take up of land zoned in the Craigavon Area Plan 2010 since adoption in August 2004 is 1.43 hectares per annum (See Table 6), suggesting that approximately 23 hectares will be needed up to 2030. Theoretically there is ample land zoned in the Craigavon Area Plan to meet demand past 2030 based on past rates of uptake.

**5.4** 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 (eg Edenaveys, Armagh City) 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.

**5.5** Furthermore, with this method of assessment, take up rates can also be skewed by the development of one single site or other factors. It does not allow for changes in take up rates as a result of changing economic conditions or new technologies/means of doing business. The take up figures above are at best crude as they do not include employment land that has come forward from land not zoned in the area plans, does not consider that some land was developed for other uses (eg residential) or have major constraints (ie flooding @ Mullinure) and must therefore be discounted, two of the plans are out of date and does not factor in existing employment estates such as Seagoe, Portadown or Scarva Road, Banbridge.

*(b) Method 2- based on population growth and unemployment*

**5.6** To estimate the number of overall 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 NISRA. 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 existing district in 2011 have been added together and averaged to give a figure for the new Council area. An unemployment rate of 5% has also been assumed.

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

- Armagh = 67.96%
- Banbridge=70.00%
- Craigavon = 67.12%
- Armagh-Banbridge-Craigavon Estimated Total = 68.05% (rounded to **68%**)

**Table 7: Estimated number in employment in ABC 2015-2030**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **Population Estimate by Year*** | 207,800 | 218,100 | 228,300 | 237,500 |
| **Estimate of population aged 16-74 (72%) **** | 149,616 | 157,032 | 164,376 | 171,000 |
| **Economically Active Population (68%) ***** | 101,739 | 106,782 | 111,776 | 116,280 |
| **The number in employment: (less 5% ****:- assumed unemployment rate)** | 96,652 | 101,442 | 106,187 | 110,466 |

Notes:
*2012 NISRA ABC Population projections.
** Figures for ABC population aged 16-74 based on total of Census 2011 population by age band 16-74.
*** Figure for economically active % assumes a continuation of 2011 figure (68%).
(Those unemployed are included in the economically active total).
**** Unemployment rate assumed to remain at ABC 2011 Claimant Count levels (5%).

**5.8** A figure for the working age population has been estimated using the proportion of the Armagh-Banbridge-Craigavon population aged 16-74 in 2011 i.e. 71.80% (rounded to 72%). 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 68% and an unemployment rate of 5% at the 2011 levels (Table 6).

**5.9** 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 13,814. However, it should be highlighted that not all of the 13,814 projected jobs will require new zoned employment lands as other sources such as town centres or existing spare capacity will meet a substantial portion of the need. This figure is less than had initially been estimated as the NISRA 2012-based population projections (released June 2014) which superseded the 2008 NISRA projections suggest a lesser rate of population increase over the plan period, as a result of a net loss of people due to migration and a subsequent decrease in the working age population.

*(c) Method 3- based on applying the average number of jobs created between 2001 and 2013*

**5.10** An estimated 9,843 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 703 jobs per annum over the period. If this average job creation figure is applied to plan period 2015-2030, potentially 11,248 jobs might be created which is below the estimate detailed above under Method 2.

**5.11** An obvious weakness of Methods 2 and 3 is that we have not differentiated between fulltime and part-time jobs but for planning purposes, the aim is to provide a generous choice of land for economic development.

**Table 8 – Employee Jobs by Industry 2011**

| | Total No of Jobs | (%) Jobs in Manufacturing | (%) Jobs in Construction | (%) Jobs in Services |
|---|---|---|---|---|
| **NI** | 681,641 | 10.90% | 4.80% | 83.10% |
| **ABC *** | 65,878 | 15.50% | 5.10% | 77.70% |
| **Armagh** | 18,594 | 9.60% | 5.50% | 82.60% |
| **Banbridge** | 10,421 | 8.90% | 6.20% | 82.70% |
| **Craigavon** | 36,863 | 20.40% | 4.50% | 73.70% |

Source:September 2011 (Northern Ireland Census of Employment 2011)
http://www.detini.gov.uk/deti-stats-index/stats-surveys/stats-census-of-employment.htm
*ABC figure is total of 3 Council 2011 DETI figures.

**Table 9: Jobs required by 2030 projected by ABC Industrial makeup (%) 2011**

| | Total No of Jobs required to 2030 | (%) Jobs in Manufacturing | (%) Jobs in Construction | (%) Jobs in Services | Other Jobs (%) |
|---|---|---|---|---|---|
| **ABC Industrial Makeup (2011 %)** | | 15.5% | 5.10% | 77.70% | 1.7% |
| **Method 2** | 13,814 | 2141 | 705 | 10734 | 235 |
| **Method 3** | 9,843 | 1526 | 502 | 7648 | 167 |

**5.12** 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 for manufacturing and services. The Census of Employment (DETI) indicates that the proportion of jobs in manufacturing in Armagh-Banbridge-Craigavon in 2011 was 15.5%, 5.1% in construction, 77.7% in services and 1.7% in other jobs (Table 7). How these proportions translate to the figures provided under Methods 2 and 3 is set out in Table 8. The remaining jobs will be in areas such as construction, forestry, fishing, mining, quarrying, electricity, gas and water supply.

**5.13** 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 99sqm 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. This included Halfpenny Valley Industrial Estate in Lurgan. By contrast, the more modern Industrial Estates such as Edenaveys Industrial Estate (Armagh) or Seagoe (Portadown) had a lower average density of approximately 1 job per 23sqm due to the presence of uses such as call centres, smaller units, food production, pharmaceuticals and offices. This is broadly similar to research by Colliers CRE which suggested an average between industrial estates of 1 job per 25 - 30sqm.

**5.14** Establishing employment levels per hectare is equally problematic. Research by Colliers CRE 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 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 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.

**5.15** 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 **276** hectares of economic development land would be required under Method 2 and **197** 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. Planning employment land surveys in January 2015 reveal that there is approximately 240 hectares of zoned employment land (including mixed use land) undeveloped in ABC and approximately 110 hectares of existing employment land throughout the ABC larger settlements.These two figures would provide a total hectarage of approximately 350 hectares of employment /potential employment land.

**5.16** Considering the potential of 350 hectares of employment /potential employment land within ABC, the higher projected figure of 276 hectares required from 2015-2030 is achieveable and it also must be recognised that most jobs will be in the service sector rather than on industrial-type estates. More importantly, 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. Employment will also occur in some industrial activities associated with smaller settlements (villages & small settlements) and as part of farm diversification in the countryside.

**5.17** With approximately 350 hectares of zoned economic/potential development land remaining across Armagh-Banbridge-Craigavon, there would appear to be no immediate need to identify additional land. However, 12 hectares in Armagh are considered undevelopable due to flooding (i.e. Loughall Road & Mullinure sites) and in 2010 Invest NI stated that they needed additional land in Armagh City. There is also approximately 5 hectares of 'whitelands' within the Craigavon Urban Area limit adjacent to Seagoe Industrial Estate that must also be discounted. Therefore, 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. This exercise should provide a network of economic development opportunities to ensure an adequate and continuous supply of land for employment purposes over the plan period at the most easily accessible locations. The focus will be on larger urban centres taking advantage of their locations on the regional transport network in line with regional policy.

**5.18** A further paper 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, 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 can facilitate development within and outside village settlement limits.

**5.19** In zoning land, a simplistic approach would be to apportion it in accordance
with the population size of the main hubs. This would suggest allocations between the three main settlements as follows:-

- **Armagh City= 16.8%** (based on 2001* population of 14,590)
- **Banbridge Town = 16.9%** (based on 2001* population of 14,740)
- **Craigavon Urban Area = 66.3%** (based on 2001* population of 57,685)

*NISRA 2011 Census settlement figures which are not yet available are due to be released in Spring 2015.

However other options will present themselves once a settlement hierarchy has been agreed. A second option would be to take into account demand. But it is difficult to quantify demand on privately owned sites and the only real indicator of this is Invest NI. Invest Northern Ireland (INI) land holdings in ABC include land at Edenaveys Industrial Estate, Newry Road, Armagh, Scarva Road Industrial Estate, Banbridge, Charlestown Road Industrial Estate & Mandeville Road Industrial Estate, Craigavon and Halfpenny Valley Industrial Estate, Lurgan. INI have also indicated that they would require additional lands in Armagh City which is considered under the Armagh Area Plan 2004, the oldest extant ABC area plan which contrasts with Banbridge and the Banbridge/Newry & Mourne Area Plan 2015 which was adopted in October 2013.

**5.20** A combination of of the above approaches – a form of hybrid – would 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.

**5.21** 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 use 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.

**5.22** The three Methods would suggest the following employment land requirement for the ABC Council Area from 2015 to 2030:

1. Based on the amount of land developed to date: **36 ha;**
2. Based on population growth and unemployment: **276 ha**; and
3. Based on applying the average number of jobs created between 2001 and 2013: **197 ha**.

The Regional Development Strategy (RDS) directs that we should 'ensure adequate supply of land to facilitate sustainable economic growth' and therefore Method 2 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.

# 6.0 ALLOCATING ECONOMIC DEVELOPMENT LAND

**6.1** The purpose of this section is to consider the options for allocating economic development land across the ABC Council Area over the plan period.

**Allocating Economic Development Land**

**6.2** 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 ABC much employment is still based in manufacturing, especially within Criagavon 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.

**6.3** As indicated if a minimum requirement of 276 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 back ground studies). Accordingly 276 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.

**6.4** In considering how these sites should be allocated across settlements, the RDS makes it clear that the hubs should be the focus of growth. Armagh, Banbridge and Craigavon form a cluster of main hubs, although it does not exclude zonings in other locations. However, the sub-regional importance of Craigavon should not be under-estimated given its strategic location in terms of connectivity to the main transport routes, access to labour and consumer markets. As such 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 the three towns based on one of the following three options.

*Option One: Equal Share*
Provide each of the main hubs an equal share aiming to provide around 92 hectares minimum in main hub. The benefit of this approach is that it treats

each location equally, which could be of benefit to Armagh by offering a greater range & choice, but in turn could significantly restrain growth in Craigavon in comparison to current sites on offer at present.

*Option Two: District Hinterlands and Catchment*
Assuming the former council districts broadly coincided with their hinterlands it is possible to proportion growth providing regard to catchment. In ABC the former districts population equated as 29.57% Armagh (59340*), 24.08% Banbridge (*48339) and 46.35% in Craigavon (*93023). In relation to the overall ABC projected provision of 276 ha employment land, this broadly equates to 82 ha for Armagh, 66 ha for Banbridge and 128 ha for Craigavon.
*Source:NISRA 2011 Census (Table KS102NI.)

*Option Three: Population of City/Town/Urban Area*
The updated city/town populations are not available from NISRA as of yet. Therefore based on the 2001 Census*, 14,590 people lived in Armagh (16.8% of ABC), 14,740 people lived in Banbridge (16.9% of ABC) and 57,685 people lived in Craigavon (66.3% of ABC). Apportioning growth on this basis suggests that of the 276 hectares, 183 hectares should be allocated to Craigavon, 47 ha hectares for Banbridge and 46 hectares for Armagh. This can be updated when NISRA publishes settlement information in the spring time.

**6.5** Given that Craigavon is a sub regional area, careful consideration needs to be given to how economic land is distributed to ensure that there is an adequate supply of economic land to both Armagh and Banbridge whilst not suppressing Craigavon. 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. 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. It is not required to zone sites 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.

## 7.0 LOCATIONS OF INDIVIDUAL ZONINGS

**7.1** The purpose of this section is to consider the location of individual zonings and the deliverability of land.

**7.2** From the study it appears that certainly for the short to medium term it appears there is sufficient land zoned. As such there may not be a need to bring forward additional land at the Plan Strategy stage, which means it should be possible to prepare a Draft Plan more quickly. However, questions still remain as to whether all of the sites are deliverable in terms of their being a willing seller and someone necessary to invest in any infrastructural requirements. It is therefore advised that a full review of existing sites is undertaken for the Local Policies stage of the Plan process.

**7.3** To aid this, existing land owners 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.

# 8.0 CONCLUSIONS & KEY FINDINGS

**8.1** The purpose of this paper has been to provide base line information on the employment and economic development needs of the new Council area to assist in informing the Community Plan and to consider how future economic growth should be addressed. In compiling this paper, it is recognised that this evidence can be supplemented by the Community Plan process.

**8.2** This paper has provided an indication of the ability of the existing Area Plans to deliver the anticipated number of jobs required up to 2030. Given that job market recovery has been slow in Northern Ireland, job creation for the new Plan will be challenging with the boom years of construction and manufacturing now in decline and cuts in the public sector recently announced, local economies may need to focus on growth in other sectors such as professional services, information and communications (Oxford Economics, 2014). If more jobs are to found within the service sector and town centre businesses, the amount of land required for economic development uses may be less than estimated. It is also evident that to diversify employment in ABC requires more highly skilled individuals which are currently relatively underrepresented in the economy and particularly amongst the unemployed (Oxford Economics, 2014).

**8.3** From the research it is clear that all three Council Areas have experienced a slow take-up rate of employment/industrial lands. This should have a caveat attached as considering the uptake of zoned employment lands alone as a future guide to requirements is lacking. This is because this does not consider development constraints, age of plan, development on whitelands/existing employment sites, town centres or changes in the economy.

**8.4** A summary of the key findings are as follows:-

(i) Armagh, Banbridge & Craigavon is recognised as having a strong manufacturing & service base. Future jobs growth is expected to be in service sectors such as information and communications technology and professional and technical services. Future ABC employment opportunities may include storage & distribution, the agri-foods and the health & biomedical sectors. Any plan should try to facilitate growth in these sectors. In selecting land for development, it is important to provide sites with quality environments located on transport corridors to attract businesses.

(ii) The number of new jobs required for the period 2015-2030 is estimated to be up to 13,814. The majority (80%) of these are expected to be provided within the service sector.

Key findings continued:

(iii) Based on the estimated number of jobs required in manufacturing and services, between 197 and 276 hectares of zoned land are required. In order to provide the maximum amount of flexibility it is advised to opt for the higher figure. The focus of zoning for employment land should be in the hubs which will take the largest share.

(iv) Land should also be allocated in the local towns having regard to their population and hinterland.

(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 Armagh, Banbridge and Craigavon, 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.

**8.5** In conclusion and in line with regional guidance, pursuing the methodology contained in Method 2 will allow for 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 within ABC.

**8.6** There is a need 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 any others willing to provide land.

**8.7** A full review of policies contained within PPS 4 should be undertaken to identify options for policy revisions for member consideration. This should
include further consideration of whether sufficient protection is afforded to existing industrial sites.

**8.8** Members are invited to give their views on the proposed options for allocating employment land across the Plan Area

# Appendix 1

## The Employment Land Evaluation Framework (RDS 2035)

| | |
|---|---|
| **Stage 1**<br>Taking stock of the existing situation | 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 other uses. |
| **Stage 2**<br>Understanding Future Requirements | 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. |
| **Stage 3**<br>Identifying a 'New' portfolio of sites | 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. |

**Appendix 2: Armagh City & District Council Zoned Industrial Land:**

| Settlement | Location | Area zoned for Industry (Ha) | Area developed for industry (Ha) | Area lost / developed for non-Industry (Ha) | Area remaining undeveloped (Ha) |
|---|---|---|---|---|---|
| **Armagh City** | Loughall Road | 4.37 | 0 | 1.8 | 2.57 |
| | Mullinure Road | 9.7 | 0 | 9.7 | 0 |
| | Edenaveys Newry Road | 11.3 | 4.72 | 0 | 6.58 |
| **Keady** | Annvale Road | 3.38 | 0 | 0.3 | 3.08 |
| **Markethill** | Fairgreen Road (west) | 1.07 | 0 | 0 | 1.07 |
| | Fairgreen Road (east) | 0.46 | 0 | 0.46 | 0 |
| | Coolmillish Road | 0.7 | 0 | 0.7 | 0 |
| **Tandragee** | Gilford Street | 1.95 | 0 | 0.25 | 1.7 |
| | Glebe Hill Road | 3.7 | 0 | 1.7 | 2 |
| | **Total** | **36.63** | **4.72** | **14.91** | **17** |

Source: DOE Survey January 2015

### Appendix 3: Banbridge District Council Zoned Economic Development Land

| Settlement | Location | Area zoned for Industry (Ha) | Area developed for Industry (Ha) | Area lost / developed for non-Industry (Ha) | Area remaining undeveloped (Ha) |
|---|---|---|---|---|---|
| **Banbridge** | Cascum Road (BE 33) | 19.3 | 0.75 | 0 | 18.55 |
| | Rathfriland Road (BE 34) | 13.03 | 0 | 0 | 13.03 |
| **Dromore** | Barronstown Road (DE 28) | 1.15 | 0 | 0 | 1.15 |
| | Quillyburn East (DE 24) | 0.88 | 0 | 0 | 0.88 |
| | Quillyburn West (DE 25) | 0.37 | 0 | 0 | 0.37 |
| | Quillyburn South (DE 26) | 13.92 | 0 | 0.78 | 13.17 |
| **Rathfriland** | Loughbrickland Road (RD 10) | 1.54 | 0 | 0 | 1.54 |
| | **Total** | **50.19** | **0.75** | **0.78** | **48.66** |

Source: DOE Survey January 2015

### Appendix 4: Banbridge District Council Zoned Mixed Use Land

| Settlement | Location | Area zoned for Mixed-Use (Ha) | Area developed for industry (Ha) | Area lost / developed for non-Industry (Ha) | Area remaining undeveloped (Ha) |
|---|---|---|---|---|---|
| **Banbridge** | Mixed Use Cascum Road (North:BE 35) | 24.51 | 0 | 22.51 | 2.0 |
| | Mixed Use Cascum Road (South) / Newry Road (BE 36) | 5.14 | 0 | 0 | 5.14 |
| **Gilford** | Mixed Use Gilford Mill (GD 08) | 3.93 | 0 | 0 | 3.93 |
| **Scarva** | Mixed Use Main Street West (SA 04) | 0.62 | 0 | 0 | 0.62 |
| | **Total** | **34.2** | **0** | **22.51** | |

Source: DOE Survey January 2015

## Appendix 5: Craigavon Borough Council Zoned Industrial Land

| Settlement | Location | Area zoned for Industry (Ha) | Area developed for industry (Ha) | Area lost / developed for non-Industry (Ha) | Area remaining undeveloped (Ha) |
|---|---|---|---|---|---|
| **Central Craigavon** | Land north of Northway and East of New Charlestown Road (C/I2) | 66.03 | 8.16 | 2.75 | 55.12 |
| | Land south of Mandeville Road (C/I3) | 41.72 | 0 | 0 | 41.72 |
| | Land west of Charlestown Road (C/I4) | 20.13 | 0 | 3.19 | 16.94 |
| **Lurgan** | Land north of Portadown Road (Halfpenny Valley) | 28.84 | 6.7 | 0 | 22.14 |
| | Land southwest of Silverwood Road (L/I 3) | 4.25 | 0 | 0 | 4.25 |
| | Land south of Silverwood Road (L/I 4) | 4.93 | 0 | 0 | 4.93 |
| | Land north of Silverwood Road (L/I 5) | 3.28 | 0 | 0 | 3.28 |
| | Land northeast of Silverwood Road (L/I 6) | 11.31 | 0 | 0 | 11.31 |
| **Total** | | **180.49** | **0** | **5.94** | **159.68** |

Source: DOE Survey January 2015
* No Industrial land zoned in Portadown in CAP 2010.

## Appendix 6: Definitions of Primary, Secondary & Tertiary/Service Sector Employment:

- 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 the "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 2001. ***

| | |
|---|---|
| 1. Primary | A. Agriculture, hunting and forestry.<br>B. Fishing<br>C. Mining and Quarrying |
| 2. Secondary | D. Manufacturing.<br>F. Construction |
| 3. Tertiary/Service | E. Electricity, gas and water supply<br>G. Wholesale and retail trade, repairs<br>H. Hotels and restaurants<br>I. Transport, storage and communications<br>J. Financial intermediaries<br>K. Real estate, renting and business activities<br>L. Public administration and defence, social security<br>M. Education<br>N. Health and social work<br>O, P, Q Other |

Note * - The industry categorisation is based on the ‘UK Standard Industrial Classifications of Economic Activities 1992’ (SIC92).

**Appendix 7: Notes on NI Unemployment Statistics**

In Northern Ireland, two main indicators of unemployment are used:

1. The Northern Ireland Labour Force Survey measure which follows International Labour Organisation (ILO) guidelines and is the official Northern Ireland measure. It is based on a count of jobless people who want to work, are available to work and are actively seeking employment.
2. The Northern Ireland Claimant Count is a measure of the number of persons claiming unemployment related benefit (Job Seekers Allowance).

The Labour Force Survey measure is not available at District Council level, hence the reliance on the use of the Claimant Count to help assess trends in unemployment at this level.

It should also be noted that unadjusted claimant count statistics are not comparable over time as a number of discontinuities affecting who is included in the count have been introduced. Similarly these statistics may contain seasonal influences. In some months the headline claimant count total shows a large increase or decrease due entirely to seasonal influences.

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