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1 Context and Introduction

1.1 This keynote summarises the key aspects of the economy of the Forest of Dean. It considers some key characteristics and also the current supply of land that is available for employment. It shows the broad correlation between the need for new land for employment and the likely additional population that is expected in the area over the plan period.

1.2 The nature and context of the Forest of Dean has been considered at a regional level as part of the preparatory work for the now to be discontinued RSS. It reveals some distinct patterns of travel and an economy that are not typical of the rural areas of the southwest. The summary attached as an appendix to this note is a review of the Forest of Dean's economy prepared in 2006. Given the present economic circumstances its growth estimates should be qualified although over the relatively long life of the Core Strategy a variety of economic conditions can be expected to be encountered.

1.3 The following key features of the Forest of Dean apply whatever the economic climate. The case for diversification and growth is if anything made stronger in times of uncertainty as these tend to highlight any weaknesses which tend to show themselves by closure of enterprises and reduction in investment.

- The area is not typical of its surroundings in terms of employment structure
- The surrounding area within the southwest is generally more prosperous (than the south forest)
- The economy is more vulnerable to declines in manufacturing (as it is a larger percentage of the economy)
- There is less representation of the growth sectors
- The workforce employed in the area have lower wages than the residents by a marked degree
- There is a clear interaction between the three forest towns and scope to develop this further.
- Within the three towns there is a very low ratio of population to jobs.
- The economy of the area, especially of Cinderford has potential to grow but may need support to achieve this.
- There is an apparent large supply of land in the district with potential for employment use.
- The actual supply of land with potential to provide high quality land is more limited.
- Levels of educational achievement are lower than expected.

2 Employment Requirement and Strategy

2.1 Part of the evidence for the need to diversify the economy comes from basic demography and part from studies that have been conducted both at a regional and district level. A more sustainable pattern of life requires greater job retention within the area. This can only take place if there is a better and greater range of employment opportunity.

2.2 One of the key elements in providing for future employment is land. Making suitable sites available is far from the only way in which the employment needs of the district will be addressed but it is still important. The following is a brief review of employment land supply with an indication of the general scale of requirements.

3 Land and Floorspace Availability

3.1 The Core strategy seeks to increase the range and amount of employment and seeks to do this by using more than just traditional employment land (in use or allocated for the purpose). Employment will also be delivered as part of the changes to town centres, and as a result of increases to populations requiring more services. Nonetheless an audit of land is essential for the strategy, both to establish a baseline and to enable policies for its use to be developed.

3.2 A site by site review of land has therefore been conducted. It identified 369 ha of employment land throughout the district. This comprised the following:

- 100 ha (total) is vacant, unused at present or suitable for redevelopment
- 61ha of this 100ha is in locations that are considered suitable for allocations and could be allocated or otherwise identified as such. These sites are well located in respect of their proximity to towns and villages and other services. Access is also considered suitable.
- 20ha is generally less well located but is suitable for continued employment use
- 4.5ha is suitable only for particular uses being generally located away from settlements
- Much of the remaining 24ha is discounted because of potential flooding and other fundamental constraints.
- A significant amount of the vacant floorspace contained in buildings on land within the above categories is currently being marketed as available for rent or purchase, often at low rents reflecting the nature of the property concerned.

3.3 In addition to the above land and buildings that require replacement or substantial refurbishment (ie the 100ha), there is a large quantity of vacant but more usable floorspace available for letting within the remaining 260ha in use for employment purposes. Much of this is contained within older, albeit serviceable, premises and is unlikely to be suitable for more intensive or high value uses. A great deal of the space being marketed as available for letting has potential for redevelopment, so the amount of good quality floorspace meeting modern requirements within the district for letting or purchase is much less than a simple addition of the available floorspace would suggest. There are notable exceptions such as the good quality space (office and industrial) available at Vantage Point or new purpose built factory units at Cinderford. Taking the stock of employment premises as a whole (vacant and in use), there are however comparatively few new or modern premises, with under one third of properties surveyed in 2006/7 by Peter Heath () being under 20 years old. There was also at the time of the survey a major lack of property available for purchase. Although the prevailing economic conditions have changed and there may as a result be more space available than at the time of the survey, there are only a limited number of locations in the district where new buildings or serviced sites are available for purchase.

3.4 Monitoring by Gloucestershire First shows approximately the following vacant space (Sept 2009):

14 retail units totalling 2447m2,

21 office premises (total 11500m2 and 7 of 929- 2322m2), and

69 (73000m2) units of industrial space, including premises of up to 12000m2.

This is likely to be an underestimate.

3.5 Much of the available employment space is old and while there is clearly a large supply of buildings for rent on the market there is a shortage of quality accommodation. The land and buildings that are available are generally in locations that are quite well related to the main towns and villages. The retention of a good supply of land and premises in these locations is essential for the strategy of providing a greater and wider range of land and premises.

3.6 Despite the large amount of vacant space, there is evidence in terms of recent changes that supports the view that there is scope for additional well located land which can provide for higher quality premises. Since the Rank Xerox premises at Mitcheldean were vacated by that company, the site has been managed commercially to provide office, manufacturing and storage space. Although there are currently vacancies, including some large units, the site has been successful in attracting new business to the area including office users. One of the larger vacant units was new in 2007, having being built for an incoming company which unfortunately was only briefly in occupation.

2008 Marketing and Workspace Study

4 Approximate Job Requirements

4.1 The new dwellings that are required in the district will need to be accompanied by new employment. It is possible to estimate the scale of employment land that may be required for these additional dwellings along the following lines:

- The dwelling requirement from 2006 to 2026 is 6200
- The balance still to be provided taking account of the 1038 completions 2006/ 7 to 2009/ 10 is 5162 (6200-1038).

5162 new dwellings could require the following jobs:

- number of persons @ 2.2 per house is 5162 *2.2 persons = 11356:
- percentage of population which is 16-74 (generally of working age) is 72.2%

72.2% of 11356 is 8199

- percentage of above which are economically active is 70%, = 8199*0.7 = 5739
- Total number of jobs required by new dwellings is 5739
- Total number required less number working from home (12.2% of the total economically active 16-74 year olds) 12.2* 5739 = 700
- Therefore : **total new jobs estimated 5739 – 700 = 5039**

5 Land Requirements

5.1 Guaranteeing that a certain number of jobs will be provided on a given area of land is not possible. The requisite land must however be made available so some form of estimate must be made in order to know how much to make available. Where the strategy is to expand the range and diversity of employment available, as in the case of the Forest of Dean, it is more important to ensure that the sites are suitable than to control the amount of land to an artificial total. It is also appropriate to make land available in a variety of locations, to provide choice. This does not mean there should be an excessive provision, just that ensuring a range of good quality sites in the right locations is a priority over a strict review of the quantity of land to be identified. Flexibility, in terms of maintaining a range of available sites is especially important in meeting the shortage of land for purpose built (sale or rent) premises and in order to be able to cater for potentially larger single occupiers.

5.2 There are estimates based on research of the likely yield of jobs on a given area of land. These make clear the increasing density with higher uses, so for example B8 is unlikely to employ at the same density as offices. Figures of around 75 to 100 workers per hectare have been used (SW RPG 2002 monitoring report), and are generally supported by research carried out by the then English Partnerships (Employment densities by Arup Economics and planning for EP and the RDAs, 2001).

5.3 5039 jobs could therefore require between 50 and 67 ha of land at the above range of densities. It is however unreasonable to assume that all new jobs will be on land allocated for the purpose as in practice many are provided in town centres and on individual sites throughout the area. Service jobs in particular and those in the public sector are widely distributed into schools, health centres and other public offices.

- It is unlikely that agriculture and forestry will be require allocated employment land (3.7% of all employment), nor will tourism that offers about 8%.
- Other sectors which will not wholly require allocated employment land include:

- distribution, hotels restaurants (19.7% of all employment)
- Banking and finance (13.5%)
- Public administration education and health (22.0%)
- Other services (4.4%)

5.4 The above categories that are unlikely to require traditional allocated sites for all their needs account for about 71.3% of all employment.

5.5 The above requirement in terms of land is therefore likely to be an overestimate, if provision is sought that only matches the proposed new housing development.

5.6 Importantly it does not address the existing imbalance in the district where there are about 9000 more employees leaving the district on a daily basis for employment than enter it. There is therefore a case for creating up to 9000 additional jobs within the area. This more even balance would not stop commuting but would lead to a situation where there was less need to commute. It is however perhaps sensible to aim at a "job density" more akin to Cotswold (0.94) or Herefordshire (0.87) (quoted by Peter Heath, 2008 which gives the figure for the Forest of Dean as 0.6).

5.7 If these jobs could be created on new "employment land" there would be a requirement of around 92ha at the midpoint of the two employment densities quoted above (assuming that the job density is similar to Cotswold or Herefordshire (90%)) of the 9000. This still assumes that job provision will be on new land dedicated for the purpose and assuming a range of jobs are envisaged, many will be on sites in other types of location. Some of the additional jobs may result from increased home working through time. This may increase as a result of personal choice in response to factors such as increased fuel prices. The diversification sought by the LDF strategy and the fact that the growth sectors tend not to be based on enterprises located in traditional premises will further reduce the amount of new land required as the employment structure changes.

6 The Core Strategy Approach

6.1 The approach taken for the Core Strategy is to analyse the land that is potentially available and then to provide from that a range of sustainable sites either by re affirming allocations that already exist or by providing new. It is considered vital to offer a range of sites in sustainable locations and to ensure that these can be developed. The sites in the attached schedule listed as in an accessible location will continue to be identified as available. This total is about 61ha and could offer 5307 (approx) jobs, again at the midpoint of the density assumptions.

6.2 The sites vary from greenfield land which accompanies proposed housing in a new neighbourhood to modest extensions onto land adjoining existing enterprises in villages.

6.3 The table of sites identifies the location of each, and provides a reference for the mapped information. There is a description followed by an analysis of spare capacity and accessibility, with brief commentary on constraints including flood risk, location and ownership.

6.4 Increased employment in a variety of other locations will be encouraged and the trend away from traditional sites (land marked for employment use, or industrial "estates" for example) is expected to continue. A wide range of sites have been considered in the table below. Some are capable of providing the more traditional sites and others have wider capabilities.

6.5 In addition to specifying sites, the Core Strategy encourages employment by the following means:

- sustaining the development of key economic sectors or clusters, including knowledge based enterprises and tourism;
- providing office and business (B1) space in attractive locations;
- providing the conditions and support for small and medium sized enterprises to become established and grow;
- supporting further and higher education and skills training and the facilities to provide it and
- supporting transport investment that will aid economic development.

Land presently used for employment will be expected to remain so, unless allocated for another purpose. In order to encourage this, a range of employment generating uses appropriate to each site will be considered favourably. Where a site is underused and unsuitable (by way of environment or location) for any employment generating use, (including service based uses) then a mixed use may be appropriate (eg employment and housing) and failing that an alternative non employment use.

6.6 National policy, principally in PPS 4, encourages a variety of sustainable employment including in rural areas and this approach is supported for the Forest of Dean, alongside the more local policies which guide distribution and any local constraints.

7 Annex 1

Background Information

Extracts from

SPATIAL IMPLICATIONS OF ECONOMIC POTENTIAL IN THE SOUTH WEST
Roger Tym & Partners South West of England Regional Development Agency
March 2006 page22

North East Triangle

(3.24) This the largest Zone in the region and has significant potential for further growth. It includes the major urban areas of Bristol, Bath, Swindon, Gloucester, Cheltenham and Weston-super-Mare, as well as towns such as Stroud, Cirencester, Chippenham, Trowbridge, Frome and Warminster. The zone has links to Wales, the West Midlands and South East. Three distinct sub-zones are evident within the North East triangle, namely:

• Bristol, Bath, Weston-super-Mare and its hinterland – the West of England.
• Swindon and the adjacent M4 corridor.
• Gloucester, Cheltenham and the adjacent M5 corridor.

(3.25) The North East triangle is the most prosperous, economically diverse and accessible part of the region. It is the economic powerhouse of the region, with strong links into the national economy. The Zone (the so called North East triangle) boasts the highest skills and incomes levels of any in the region. Key sectors include high-tech manufacturing and ICT industries.

Deprivation tends to be concentrated in urban areas, although the Forest of Dean also suffers economic problems. The zone contains many of the attributes of a successful economy:....

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(3.41) It should also be noted that the Forest of Dean towns lie in the more rural and northern part of the North East triangle, and have some economic relationships with the larger centres, both with Gloucester/Cheltenham and increasingly with Bristol.

..Forest of Dean Towns 33,358 (popn) 11,656 (jobs) 34.9% popn to jobs (table following 3.144)...

(3.145)..Other settlements with very low ratios include Frome (a small local service centre with high out commuting) and the Forest of Dean (similar issues to Frome)...

Forest of Dean towns 11,656 (employment in urban area- towns) 18,298 (63.7%)urban area employment as a total of employment in TTWA, shows relative concentration in the urban areas. (table following paragraph 148)

Overall, employment is expected to rise by 3,800 (+17%) to 4,700 (+20%) over the next 20 years, faster than the regional average. From section "Forest of Dean p297) Note (not part of extract- This is supposed to rely heavily on Other Business Services, Miscellaneous Services, Hotels & Catering and Education & Health. All other sectors are forecast to stagnate or decline).

Potential Issues

A high level of growth is expected of Cinderford TTWA and whilst it has potential, it will also need vigorous, concerted action to achieve this over average level of growth:

Recent poor performance in Hotels & Catering puts a question mark on its ability to lead growth. It needs to be investigated

The change from an industrial area to one based on services is still to be completed fully.

Forest of Dean additional settlement summary from Spatial Implications of Economic Potential in the South West.
Final Report
Roger Tym & Partners
June 2006 (found in P297 of the Report as an annex)

FOREST OF DEAN

The Forest of Dean is sited to the west of the River Severn within Gloucestershire and adjacent to the border with Wales. The three largest towns in the area are Cinderford,Coleford and Lydney and have a combined population of around 33,000.

Heavy industry and mining has had a significant influence in the development of the Lydney, Cinderford and Coleford area. Historically Lydney was a port for the Forest of Dean area exporting local raw materials such as stone, coal, iron and timber until the demise of those industries. The towns within the area are at an important stage in their development, where their core roles are changing from major mining and heavy industrial centers to sub-regional shopping, service and commuter centres. Deprivation is a problem within the area as well as perceived vagrant/drug problems.

Forest of Dean lies within the Northeast Triangle zone of the region, which is characterised as generally prosperous – the economic powerhouse of the region. There is high employment within the knowledge economy and high skills levels and wages across the zone. The main broad sector is advanced manufacturing and the priority sectors are advanced engineering and ICT. Skills shortages are arising in the area, largely as a result of the zone's economic success and low unemployment rate. The Forest of Dean does not fit with these characteristics, exhibiting far less knowledge based industrial growth, much lower wages and skills and high deprivation.

Infrastructure
The three towns within the Forest lie within 10 miles of each other and relatively close to Gloucester. Only Lydney is accessible by train as a mainline railway which runs along the bank of the river from South Wales to the Midlands. As the towns are accessed in the main by car, there are significant traffic impacts in all towns. The main problem is access to the Forest area from the national motorway/road system- from M5 at Gloucester, M4 at Chepstow and M50/A40 to north and west.

The towns are surrounded by forest and open countryside which means that there are limited opportunities to extend the towns without losing the value of the countryside. Coleford benefits from tourist activity.

The poor environmental quality of Cinderford and Lydney have been identified as a significant problem. Neglected and empty buildings are a key concern. The environmental quality of Coleford is less of a problem.

The Forest of Dean retail economy suffers significant 'leakage' to other towns outside the District. Within the district investment in Lydney appears to be growing as evidenced by a new Tesco built in the last few years. Coleford has not declined but has had little new development and Cinderford has actually lost ground as a shopping centre since the late 1990's although a brand new Tesco development is now proposed. A lack of national retailer representation is however an issue in all the towns.

[4] Urban areas are defined according to Census boundaries. However they had to be defined at ward level (instead of output area) to allow the use of ABI employment data. This means population numbers will differ slightly from Census tables.

Successful and Competitive Businesses and Organisations

Health & Social Work and Construction have become major sectors in Cinderford both in terms of job numbers and relative specialisation. Distribution is another large employer. The location quotients continue to reflect the important role of manufacturing in the area. The main employers in Coleford are similar to many other urban areas; Hotels & Catering is particularly strong due to tourist activity. Specialisation levels reflect the manufacturing past of Coleford but they are also more diversified, including Public Administration, Education and Agriculture.

Lydney does not have a particularly diversified structure and relies heavily on its 5 largest sectors – namely retailing, basic metals, health & social work, distribution and hotels & catering. These sectors employ 77% of total local labour force. Basic Metals especially is an unusual sector to find in the top 5. Specialisation levels reflect the strong industrial history of the settlement. Indeed, the economy of Lydney is dominated by one or two relatively large manufacturing companies – Watts/Cromptons/Federal Mogul/Albany Engineering etc.

Skills, Capacity & Aspirations
There are high levels of out commuters who shop outside the district and an ageing population with less expendable income.

Whilst housing is cheaper than in some surrounding areas, the attractiveness of the Forest of Dean and the increasing number of residents who choose to commute have pushed up prices. Given the low wage economy within the district, this is creating affordability issues.

Prospects
Cinderford TTWA (which includes all the Forest of Dean towns) generates 0.8-0.9% of regional GVA and employment and is forecast to broadly continue doing so over the next 20 years. Overall, employment is expected to rise by 3,800 (+17%) to 4,700 (+20%) over the next 20 years, somewhat faster than the regional average. GVA is however forecast to increase more slowly than in the region as a whole suggesting that the jobs created will occur in low value added sectors.

Employment growth is likely to rely heavily on Other Business Services, Miscellaneous Services, Hotels & Catering and Education & Health. All other sectors are forecast to stagnate or decline. The pattern of growth seems particularly favourable to Coleford; other locations may require more restructuring.

A high level of growth is expected of Cinderford TTWA and whilst it has potential, it will also need vigorous, concerted action to achieve this above average level of growth. Recent poor performance in Hotels & Catering puts a question mark over its ability to lead growth. The change from an industrial area to one based on services is still to be completed fully. Key challenges for the Forest of Dean towns in relation to the RES include:

• RP1A, RP1B: Forest of Dean towns need to continue diversifying and overhauling their economy, replacing traditional activities with more high value added ones. Business support may be required to achieve this;

• RP1C: to achieve the necessary restructuring, upskilling or re-skilling initiatives for some of the labour force may be required

• RP2C: Forest of Dean towns have considerable potential for growth, in part because of the quality of the Forest of Dean environment and its' proximity to Bristol and Gloucester – Cheltenham. This is a resource that also brings constraints so sustainable development must be top of the agenda;

• RP3B: there is considerable tourism potential in the area, not just in Coleford, and the three towns should build on it. They could for instance develop a common promotional/marketing strategy.

• RP3C: Cinderford, Coleford and Lydney may benefit from working together, building on each others strengths to become more competitive and ensuring that they can be more than dormitory towns for Bristol and Gloucester;

Other Strategy Objectives (RSS / RTS):

• House prices
• Quality urban design
• Public transport

FOREST OF DEAN – QUANTITATIVE

Summary figures

	1991	**2001**	**% Change**
Population - Cinderford[1]		11,717	
Population - Coleford[1]		11,508	

	1991	2001	% Change
Population - Lydney[1]		20,133	
Population - Forest of Dean[1]	75,351	79,982	+6.1%
Employment - Cinderford[2]		3,932	
Employment - Coleford[2]		3,297	
Employment - Lydney[2]		4,427	
Employment - TTWA[3]	22,800	24,000	+5.3%

Summary Figures

Source: Census (1), ABI (2), Cambridge Econometrics (3)

1.52 The TTWA is based upon Cinderford but encompasses the 3 towns. Employment in the TTWA has grown more slowly than in the region as a whole.

Employment - Sector size and specialisation
Cinderford

Top 5 Largest sectors	Employee jobs
Health & Social Work	733
Retailing	387
Education	361
Construction	328
Distribution	278

Urban Area Level

Source: ABI 203

	SW Location Quotient	% total jobs
Basic Metals	16.4	2.7%
Chemical nes	6.0	1.9%

	SW Location Quotient	% total jobs
Non Metallic Minerals	5.6	2.1%
Metal Goods	2.3	2.5%
Wood & Paper	2.2	1.3%
Construction	1.9	8.3%
Rubber & Plastics	1.8	1.4%
Manufacturing nes	1.7	1.2%
Electronics	1.7	0.9%
Health and Social Work	1.5	18.6%
Land Transport	1.5	3.8%

Source: ABI 2003

1.53 Health & Social Work and Construction have become major sectors in Cinderford both in terms of job numbers and relative specialisation. Distribution is another large employer. The location quotients continue to reflect the important role of manufacturing in the area.

Coleford

Top 5 Largest sectors	Employee jobs
Education	642
Public Administration	384
Retailing	344
Health & Social Work	301
Hotels and Catering	296

Urban Area Level

Source: ABI 2003

	SW Location Quotient	% total jobs
Other Mining	4.2	0.9%
Non Metallic Minerals	4.1	1.5%
Mechanical Engineering	2.7	3.3%
Motor Vehicles	2.7	1.6%
Metal Goods	2.6	2.8%
Agricultural	2.1	2.6%
Education	2.1	19.5%
Public Administration	2.0	11.6%

Source: ABI 2003

1.54 The main employers in Coleford are similar to many other urban areas; Hotels & Catering is particularly strong due to tourist activity. Specialisation levels reflect the manufacturing past of Coleford but they are also more diversified, including Public Administration, Education and Agriculture.

Lydney

Urban area level

Top 5 largest sectors	Employee jobs
Retailing	760
Health & Social Work	501
Metal Goods	410
Basic Metals	373
Distribution	369

Urban Area Level

Source: ABI 2003

	S W Location Quotient	% total jobs
Basic Metals	51.8	8.4%

	S W Location Quotient	% total jobs
Wood & Paper	12.5	7.2%
Metal Goods	8.7	9.3%
Rubber & Plastics	6.2	4.8%
Chemical nes	4.6	1.5%
Non-Metallic Minerals	2.4	0.9%

1.55 Lydney does not have a very diversified structure and relies heavily on its 5 largest employment sectors: they employ 77% of total local labour force. Basic Metals is an unusual sector to find in the top 5. This translates into a very high location quotient. Specialisation levels reflect the strong industrial history of the settlement.

	Cinderford	Coleford	Lydney	TTWA
Agriculture etc	0.2%	2.6%	0.3%	0.7%
Air Transport	0.0%	0.0%	0.0.%	0.0%
Banking & Finance	1.0%	0.9%	1.6%	0.9%
Basic Metals	2.7%	0.1%	8.4%	2.7%
Chemicals nes	1.9%	0.0%	1.5%	0.8%
Coal	0.0%	0.0%	0.0%	0.0%
Communications	2.2%	0.8%	1.2%	1.2%
Computing Services	0.2%	0.8%	0.2%	1.1%
Construction	8.3%	3.5%	2.2%	4.8%
Distribution	7.1%	6.9%	8.3%	7.4%
Education	9.2%	19.5%	5.4%	11.9%
Electrical Engineering	1.2%	0.2%	0.0%	1.1%
Electricity	0.0%	0.0%	0.1%	0.0%
Electronics	0.9%	0.0%	0.0%	1.2%
Food, Drink & Tobacco	2.4%	0.4%	0.4%	0.7%
Gas Supply	0.0%	0.0%	0.0%	0.0%

	Cinderford	Coleford	Lydney	TTWA
Health and Social Work	18.6%	9.1%	11.3%	11.7%
Hotels & Catering	4.0%	9.0%	4.1%	6.4%
Insurance	0.1%	0.0%	0.0%	0.0%
Land Transport	3.8%	2.3%	1.2%	2.6%
Manuf. Fuels	0.0%	0.0%	0.0%	0.0%
Manufacturing nes	1.2%	0.4%	0.0%	0.4%
Mechanical Engineering	0.7%	3.3%	1.6%	1.2%
Metal Goods	2.5%	2.8%	9.3%	4.4%
Miscellaneous Services	6.1%	5.4%	3.1%	4.3%
Motor Vehicles	0.2%	1.6%	0.0%	0.6%
Non-Metallic Minerals	2.1%	1.5%	0.9%	1.1%
Oil & Gas etc	0.0%	0.0%	0.0%	0.0%
Other Business Services	3.5%	1.6%	2.2%	9.5%
Other Mining	0.0%	0.9%	0.0%	0.4%
Other Transport Equipment	0.0%	0.0%	0.0%	0.0%
Pharmaceuticals	0.0%	0.1%	0.0%	0.0%
Printing and Publishing	0.8%	0.3%	0.7%	0.4%
Professional Services	3.2%	3.0%	4.7%	4.3%
Retailing	9.8%	10.4%	17.2%	10.5%
Rubber and Plastics	1.4%	0.1%	4.8%	1.8%
Textiles, Clothing & Leather	0.1%	0.1%	0.3%	0.1%
Unallocated	0.0%	0.0%	0.0%	0.0%
Water Supply	0.0%	0.0%	0.0%	0.1%
Water Transport	0.0%	0.0%	0.0%	0.0%
Wood & Paper	1.3%	0.5%	7.2%	2.5%

	Cinderford	Coleford	Lydney	TTWA
Public Administration	3.3%	11.6%	1.6%	3.3%

Source=ABI

1.56 The table above confirms and further details the observations made earlier on the respective sectoral structure of each of the 3 towns. The TTWA is a compilation of the 3 and other small towns in the area.

Past trends – TTWA
1.57 Cambridge Econometrics provides historical data from 1981.

		1981 -2005
1	Agriculture etc	0.68
2	Mining & Quarrying	1.00
3	Food. Texiles & Wood	0.64
4	Printing and Publishing	1.00
5	Chemicals and Minerals	0.37
6	Metals & Engineering	1.64
7	Electronics	0.17
8	Transport Equipment	0.20
9	Manufacturing nes	1.00
10	Electricity, Gas & Water	n/a
11	Construction	1.33
12	Distribution	1.64
13	Hotels & Catering	2.33
14	Transport & Comms	0.82
15	Banking & Insurance	1.00
16	Other Business Services	4.38
17	Public Admin. & Defence	0.89

		1981 -2005
18	Education & Health	2.09
19	Miscellaneous Services	1.50
Total Employment		1.24

1981-1

1.58 Growth in the TTWA has been sustained by a mixture of population growth (reflected in Education & Health jobs), tourism (reflected in Hotels & Catering and economic growth based on both traditional sectors such as Metals & Engineering and modern ones such as Other Business Services.

1.59 It is worth noting however that all other manufacturing activities have declined or stagnated. Public Administration employment has also diminished.

1.60 The ABI provides more detailed information in terms of sectoral breakdown, although only between 1998-2003. This is useful to pick up recent trends and more focused changes which may disappear once aggregated into a broader sector.

Top 10 growths 1998-2003			**Top 10 decreases 1998-2003**		
	% Change	**Nb emp** **2003**		% Change	**Nb emp** **2003**
Pharmaceuticals	**700%**	**8**	**Other Mining**	**-46%**	**67**
Agriculture etc	**56%**	**122**	**Mechanical Engineering**	**-49%**	**227**
Communications	**56%**	**211**	**Water Supply**	**-58%**	**11**
Education	**47%**	**2,171**	**Motor Vehicles**	**-59%**	**105**
Retailing	**40%**	**1,917**	**Manuf.fuels**	**-61%**	**9**
Health & Social Work	**27%**	**2,139**	**Manufacturing nes**	**-72%**	**71**
Computing Services	**22%**	**210**	**Electronics**	**-75%**	**211**
Miscellaneous Service	**18%**	**792**	**Air Transport**	**-100%**	
Distribution	**16%**	**1,346**	**Coal**	**-100%**	
Food, Drink & Tobbacco	**6%**	**133**	**Other Transport Equipment**	**-100%**	
Source ABI			**Source ABI**		

1.61 Top increases between 1998-2003 are encouraging as they are occurring in expanding sectors (at a regional level) and reflect profound changes in the economies of the towns in the TTWA. The only surprise in this list is Agriculture.

1.62 This is further confirmed by the list of sectors incurring the major relative losses. They are mainly manufacturing or manufacturing-related activities.

1.63 Compared with the South West the TTWA has performed rather well in most expanding sectors but it is worth pointing out the recent drop in employment in Hotels & Catering, a sector especially important in Coleford.

Forecasts – TTWA – Scenarios 1 & 2

1.64 Cinderford TTWA's overall contribution to total regional employment (0.8%) is not expected to change over the next 20 years.

		2006 -2026	
		Scenario 1	**Scenario 2**
1	Agriculture etc	0.69	0.69
2	Mining & Quarrying	0.00	0.00
3	Food. Texiles & Wood	0.86	0.86
4	Printing and Publishing	1.00	1.00
5	Chemicals and Minerals	0.71	0.71
6	Metals & Engineering	0.83	0.83
7	Electronics	0.33	0.33
8	Transport Equipment	1.00	1.00
9	Manufacturing nes	1.00	1.00
10	Electricity, Gas & Water	n/a	N/a
11	Construction	1.06	1.13
12	Distribution	1.33	1.36
13	Hotels & Catering	1.29	1.36
14	Transport & Comms	1.00	1.00
15	Banking & Insurance	1.00	1.00
16	Other Business Services	1.54	1.60
17	Public Admin. & Defence	1.00	1.00
18	Education & Health	1.22	1.26
19	Miscellaneous Services	1.42	1.50

		2006 -2026	
		Scenario 1	**Scenario 2**
Total Employment		1.17	1.20
Source: Cambridge Econometrics			

1981-1

65 Overall, employment is expected to rise by 3,800 (+17%) to 4,700 (+20%) over the next 20 years, faster than the regional average.

1.66 This is supposed to rely heavily on Other Business Services, Miscellaneous Services, Hotels & Catering and Education & Health. All other sectors are forecast to stagnate or decline.

Potential issues

A high level of growth is expected of Cinderford TTWA and whilst it has potential, it will also need vigorous, concerted action to achieve this over average level of growth:

Recent poor performance in Hotels & Catering puts a question mark on its ability to lead growth. It needs to be investigated

The change from an industrial area to one based on services is still to be completed fully.

8 Annex 2

Review of Employment sites in Forest of Dean

id	Locality	Location	Use	Area	Gross Available	Net land 1	Net land 2	Net Land 3	1 Allocate	Freehold Potential	Long Term Policy Recommendation
34	Aylburton	Stockwell Lane	Mixed new and old small units part developed	1.22	0.2	0.2	0	0		0	redevelopment of former farm buildings adjoining village good example of well located site with potential for some intensification- support under general policy or identify as established employment site.
52	Blakeney	Transport yard	Transport yard, some potential for alternative use	1.43	1.4	0	0	1.4		1.4	established transport yard 1.2km from village, on A 48, support under general policy not well located for alternative uses
50	Bream	Whitecroft Road	Former colliery buildings	1.72	0	0	0	0		0	Redeveloped and in use former colliery buildings and tip, 270m from large settlement (Bream) access limited suitable for present use or similar
51	Bream	Former flour mill colliery	Former colliery buildings	1.26	0	0	0	0		0	Former mine buildings (listed) well defined curtilage, 270m from settlement access only by track support under general policy
46	Bromsberrow Heath	Business Park, Bromsberrow	Farm style buildings and associated space	0.62	0.1	0	0.1	0		0	rural site almost adjoins settlement, some potential for limited intensification support under rural economy policy
37	Churcham	Business Park, Churcham	Former farm buildings re- built to policy limits	1.8	0	0	0	0		0	Large rural well occupied site on A40(T) over 3km to nearest large village (Highnam) Limited scope for further intensification, not close to any FoD settlement support under general policy
	Churcham	Packaging works	Packaging works	0.95	0	0	0	0		0	Well established factory site fully occupied 2.3ha from Huntley
14	Cinderford	Station Street Business Park / Rothdean Trading Estate	Likely to be developed for housing	3.1	0	0	0	0		0	to be developed for housing- alternative allocations and unimplemented commitments exist in close proximity
15	Cinderford	Linear Business Park Valley Road	Uses restricted by nearby housing redevelopment	0.87	0	0	0	0		0	Site adjoins town, subject to careful control is suitable for a variety of employment based uses, retain in employment use subject to support under general policy
20	Cinderford	Ruspidge, Eastern United	Last use employment	2	0.47	0.47	0	0		0	former mine buildings some local conservation interest which can be maintained by retaining employment based uses support under general policy -
16	Cinderford	Forest Vale & Whimsey industrial estates	Mixed employment use large & complex some redevelopment and vacant plots	77.87	5.1	5.1	0	0	5.1	5.1	Large established employment area containing a variety of "B" uses alternative uses not appropriate nor desirable allocate or identify for intensification established industrial area
17	Cinderford	Newtown	Mixed undeveloped but part previously used for mineral extraction etc	3.35	3.3	3.3	0	0	3.3	3.3	part of mixed use area to be considered as part of AAP proposals
18	Cinderford	Newtown (Hamblett land)	allocated but undeveloped greenfield	2.82	1.6	0.8	0	0	0.8	0.8	part of Cinderford AAP area- part of mixed use proposals flood constraint reduces scope
67	Cinderford	Lightmoor	allocated in local plan	3.69	0.8	0	0.8	0		0.8	quite isolated but well used former mine site 900m from settlement edge support under general policy
19	Cinderford	Northern United	part occupied currently allocated for employment 2.5ha additional	8.83	2.5	2.5	0	0	2.5	2.5	part of Cinderford AAP area- part of mixed uses, redevelopment in addition

id	Locality	Location	Use	Area	Gross Available	Net land 1	Net land 2	Net Land 3	1 Allocate	Freehold Potential	Long Term Policy Recommendation
23	Coleford	Whitecliff	workshops etc in current use	1.03	0	0	0	0		0	former quarry and workshops fully occupied 600m from Coleford support under general policy
24	Coleford	Staunton Road, Sawmills	last use sawmill and other employment uses	1.81	1.8	0	0	1.8		1.8	former sawmill 900m from settlement, on main route retain in employment use subject to support under general policy
25	Coleford	Tufthorn	Industrial estate, mixed uses 1.6ha available	18.95	1.6	1.6	0	0	1.6	1.6	remaining undeveloped parts of established industrial/ employment area suitable for "B" uses with some limitations due to proximity of housing allocate or identify for intensification established industrial area
31	Coleford	Pingry Farm	farm buildings	0.86	0	0	0	0		0	Site is suitable for uses currently present and little scope for further expansion beyond current building under construction. There are other better located sites in Coleford though within 400 m by road of Coleford but does not adjoin it. Support under general policy
71	Coleford	Cannop Depot	Mixed industrial	1.54	0	0	0	0		0	
72	Coleford	Woodgate Sawmills	sawmill	1	0	0	0	0		0	
73	Coleford	Five acres garage	garage	0.4	0	0	0	0		0	
32	Coleford	Concrete Utilities Factory	single occupier but sub let in part	2.65	0	0	0	0		0	Within settlement adjoining residential areas which can be a limitation long established factory, part sub let retain in employment use subject to support under general policy
22	Coleford	Tufthorn Avenue Junction	Greenfield 1.37ha	1.37	1.37	1.37	0	0	1.37	0	Adjoins town, small area of undeveloped land which is allocated in local plan
33	Coleford	Milkwall	mixed employment site part transport	1.28	0	0	0	0		0	former mine and other industrial uses, adjoins settlement and well occupied Could be redeveloped (in part) retain in employment use subject to support under general policy
21	Coleford	Adjoining Glaxo Smith Kline	Greenfield	6.72	6.7	6.7	0	0	6.7	0	Large local plan allocation not developed. Suitable for variety of uses, in single ownership- retain allocation
44	Corse	Trading Estate, Corse	Purpose built units small site litte additional scope	0.47	0	0	0	0		0	small site within village, little scope for further development.
43	Drybrook	Puddlebrook	Small mixed site little scope for addition	0.81	0	0	0	0		0	established site, little scope for expansion 464m by road from settlement boundary- limited access support under general policy
38	Drybrook	Nailbridge	Single user builders merchant	2.22	0	0	0	0		0	large single use and established business retain in employment use subject to support under general policy
	Huntley	A40/A4136 junction	mixed employment site	1.58	0	0	0	0		0	site 300m from village, on A40(T)/ A4136 junction support under general policy
39	Longhope	Hart's Barn	Mixed site - tourism?	0.89	0	0	0	0		0	rural site part specialist retail/tourism support economy policy
40	Longhope	Richard Read	Single use depot built to policy limits	2.13	0	0	0	0		0	established but prominent large site with little scope for outward expansion but capable of some redevelopment. On A4136 and within village envelope. Retain in employment use subject to support under general policy
41	Longhope	Industrial estate Longhope	Mixed uses	1.07	0	0	0	0		0	employment area within village with some scope for change, within Conservation Area

id	Locality	Location	Use	Area	Gross Available	Net land 1	Net land 2	Net Land 3	1 Allocate	Freehold Potential	Long Term Policy Recommendation
42	Longhope	Factory A40 (concrete products)	old established site	1.74	0	0	0	0		0	Located away from settlements, well used support only under general policy may be subject to redevelopment
60	Lydbrook	Former Cable Works Stowfield	Major site now under used	8.07	6.5	0	6.5	0		6.5	Very large area of former cable works, suitable for a variety of employment based uses including tourism and recreation based. Scale is such that a variety of uses could to be promoted on the brownfield part of the site. 900m from Lydbrook settlement boundary Located close to river Wye in AONB. Access and location not ideal for larger vehicles
61	Lydbrook	Stowfield (former Temco)	Mixed site some redevelopment or development scope	0.99	0.3	0	0.3	0		0.3	Close to larger site and suitable for a variety of employment based uses, distance from village approx 840m. retain in employment use subject to support under general policy
62	Lydbrook	Employment sites in village	Mixed employment sites	0.76	0	0	0	0		0	existing employment sites within village support under general policy
63	Lydbrook	Former Waterloo Colliery (Timber Yard)	Mixed site little scope for expansion	1.3	0	0	0	0		0	adjoins settlement boundary, former pithead little additional scope support under general policy
70	Lydney	Hurst Farm	Existing farm complex used for employment	0	0	0	0	0		0	
8	Lydney	Marina Harbour Road	Modern Units well used and let	1.54	0	0	0	0		0	Within Lydney AAP area, relatively modern and well used units placed on northern edge of harbour - could in the long term take advantage of this with a wider scope for employment generating uses.
6	Lydney	Pine End Works Harbour Road	Redundant and Derelict Factory	5.03	5.03	0	5	0		5	Vacant factory within AAP area suitable for a variety of uses under the AAP. Location is key to the AAP and mixed use likely to be proposed.
7	Lydney	Lydney Industrial Estate Harbour Road	mixed employment site, some new units others older part redevelopment opportunity	24.56	1.7	1.7	0	0	1.7	0	large area of mixed employment uses, but with harbour frontage partly undeveloped. Potential for redevelopment in part over time and for mixed uses including employment. Provides much of the more traditional employment in Lydney
9	Lydney	Foundry (Federal Mogul) and former foundry, Tutnalls Street	Part unused, some additional land available within site	9.63	2.5	2.5	0	0	2.5	0	Some land is marsh and may not be suitable, remaining site is part used by a foundry. The unused portion is well located and accessible and adjoins land allocated in the Local Plan for employment. Suitable for employment providing use, though not necessarily confined to "B" uses. retain in employment use subject to support under general policy
10	Lydney	Station (Transport) Station Road	Parking and storage, transport depot	2.11	0	0	0	0		0	Part of Lydney AAP- allocate according to this with priority for the land to be used in conjunction with the station
11	Lydney	Allaston Grove Sawmill Allaston Road	Mixed Industrial only modest scope for additional land	1.69	0.4	0	0	0.4		0.4	250m from settlement boundary, former sawmill site now mainly in alternative use. Suitable for employment. support under general policy
12	Lydney	Garage showroom etc off A48 (Thompson and Thompson) Cross Hands	Car repairs and sales available	1.13	1.1	0	1.1	0		1.1	garage/ car sales close to settlement boundary, suitable for variety of employment generating uses, not necessarily confined to "B" uses retain in employment
13	Lydney	Taurus Crafts Lydney Park Estate	Large complex sites limited scope for addition	3.71	0	0	0	0		0	850m from Lydney High St and 150m and 330m to entrance from Aylburton settlement boundary large site with a variety of tourism based attractions also includes garden centre. Likely to attract visitors and suitable for employment uses which do not unduly compete with town centre

id	Locality	Location	Use	Area	Gross Available	Net land 1	Net land 2	Net Land 3	1 Allocate	Freehold Potential	Long Term Policy Recommendation
4	Lydney	Mead Lane (Built) Paper Mill Watts Industrial Tyres	mixed employment site, some new units others older vacant land	24.03	0.8	0.8	0	0		0	Part of main traditional industrial area of Lydney. Suitable for "B" uses with some surplus space but little land at present Identified in Local plan and should be retained as one of the two traditional existing employment areas in Lydney.
5	Lydney	Rear of Pine End Works Harbour Road	New Greenfield Allocation	5.85	5.8	0	5.8	0		5.8	Important site within the context of the Lydney AAP. Site has some potential but not necessarily for traditional employment use.
0	Lydney	Land east of Lydney Crump Farm Naas Lane	New Greenfield Allocation	4.86	4.8	4.8	0	0	4.8	4.8	land committed as part of east of Lydney development
1	Lydney	Hurst Farm	New Greenfield Allocation	20.96	21	15	0	0	15	15	allocation of new land in connection with east of Lydney development net available 15ha
1	Lydney	Whitecross Business Pk Church Road plot on GIS	Mixed units constrained 0ha	0.5	0.25	0.25	0	0		0	site within settlement boundary small area still to be developed
3	Lydney	Mead Lane allocation	New Greenfield Allocation 7.0ha available without flood risk	12.45	12.4	7	0	0	7	0	Proposed allocation for "B" uses, suitable for a variety though quite prominent net available 7ha due to flood constraint
53	Mitcheldean	Ladygrove Business Park	Small units adjoining quarry	4.11	0	0	0	0		0	established site 400m from settlement boundary support under general policy
54	Mitcheldean	Stenders	mixed generally older units additional land	2.24	0.35	0	0.35	0		0	established site adjoins settlement though with access limitations retain as such
55	Mitcheldean	Vantage Point	mixed site with developed scope for redevelopment/refurbishment	28.55	0	0	0	0		0	major site suitable for a variety of "B" uses. Some scope for redevelopment but generally little additional land available. Provides a significant proportion of the employment land and the lettable office floorspace in the district often lareg areas available for letting
27	Newent	Off Horsefair Lane	Mixed employment area	1.52	0	0	0	0		0	located within settlement boundary retain in employment use but need not be confined to "B" uses support under general policy
28	Newent	Town Farm	Industrial estate, plot vacant	5.05	0.67	0.67	0	0		0.67	site within settlement boundary small area still to be developed now committed
29	Newent	Hazelfield Nurseries	Extensive area	3.5	0	0	0	0		0	rural site support under rural economy policy- retail element has potential to but should not compete with Newent
30	Newent	Cleeve mill lane	part used largely undeveloped	1.72	1.4	1.4	0	0	1.4	1.4	identify for intensification established industrial area, suitable for "B" uses
35	Newent	Transport Depot, Dymock Road	Depot and yard	0.36	0.3	0	0.3	0		0.3	established site immediately north of town, support under general policy
36	Newent	Packaging Works, Upleadon Road	Single building	1.59	1.5	0	0	0		0	substantial site 800m from town by road, retain and support under general policy
26	Newent	Adjoining Town Farm	Greenfield	4.3	4.3	4.3	0	0	4.3	4.3	allocate or identify for intensification established industrial area
56	Parkend	Former Railway Sidings	small area only of land potentially available	2.87	0	0	0	0		0	site with some potential in village, suitable for "B" uses- support under general policy or retain allocation
66	Parkend	Timber works	fully utilised timber store and treatment	1.42	0	0	0	0		0	fully occupied and active site support under general policy

id	Locality	Location	Use	Area	Gross Available	Net land 1	Net land 2	Net Land 3	1 Allocate	Freehold Potential	Long Term Policy Recommendation
57	Sling	Engineering Works Sling	Mixed site with scope for redevelopment/ refurbishment some recent new build	5.14	0	0	0	0		0	large site having seen considerable redevelopment in recent years. Scope for further change and suitable for B2, B8 uses adjoins village boundary, 800m from Coleford- retain in employment use subject to support under general policy
58	Sling	New Allocation Sling	Greenfield	0.36	0.35	0	0	0		0	Local plan allocation but no evidence of interest, review under allocations document.
59	Sling	Off Laureldene	Redevelopment	0.5	0.1	0	0.1	0		0.1	support under general policy
45	Staunton Corse	Staunton Court	mixed converted farm buildings limited scope	2.46	0	0	0	0		0	support under general policy
64	Tutshill/Sedbury	Grahamstown Road	Mixed units constrained	0.83	0	0	0	0		0	support under general policy
65	Westbury	Northwood Green Timber works	Large site spare capacity but isolated	5.06	0.9	0	0	0.9		0	support under general policy
47	Whitecroft/Pillowell	Whitecroft Scovill	some scope for redevelopment and intensification	4.41	1	1	0	0	1	1	retain in employment use subject to support under general policy
48	Whitecroft/Pillowell	Vencil Resil	little additional scope	2.69	0	0	0	0		0	support under general policy may be vacant
49	Whitecroft/Pillowell	North of Level Crossing	fully developed	0.97	0	0	0	0		0	retain in employment use subject to support under general policy
	TOTAL			369.47	100.39	61.46	20.35	3.1			

"1" is additional land identified available and accessible in a location close to potential employees with good access

"2" is additional land identified but less accessible or otherwise suitable but would still be supported for continued employment use

"3" is additional land identified as available but only likely to be required in specific circumstances

1,2 & 3 comprise land available for employment, 1 is suitable for allocation or other identification in plan, 2 for protection by policies and 3 can be supported for existing use or extent but may be less suitable for expansion.