

This matter is being dealt with by
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Tony Blackburn on behalf of Helen Hockenhill

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29th August 2025

Dear Helen Hockenhill (BA (Hons) B.PI MRTPI),

Examination of the Hyndburn 2040: Local Plan (Strategic Policies and Site Allocations)

Hearing Statements - Prepared by Caddick Land

Matter 4: Hearing statement

Introduction

Marrons is instructed by Caddick Land (“Caddick”) to prepare evidence in respect of Land South of Altham Business Park. Caddick controls part of the proposed allocation, including all the land west of Altham Lane. We respond to relevant questions below.

Matter 4

Issue 4: Has the Plan been positively prepared and is it justified, effective and consistent with national policy in respect of its policies and proposals for employment land and town centres in Hyndburn?

The Economy and Town Centres

Question 1: Does the Plan set out a clear economic vision and strategy which encourages sustainable economic growth?

Yes. The Plan sets out a clear economic vision and strategy for growth, which aligns with the wider The Lancashire Strategic Economic Plan 2015-2025, the Pennine Lancashire Growth and Prosperity Plan 2016-2032, and the Hyndburn Corporate Strategy 2023-28, as set out in paragraph 2.6 of the Local Plan.

Paragraphs 2.6 - 2.8 of the Local Plan note the A56 and M65 corridors which provide connectivity, as a *significant factor* in Hyndburn's economic strategy. It is also noted that support for advanced manufacturing and businesses in higher value sectors will largely be achieved through the allocation of land in highly accessible locations that are attractive to business.

The Council acknowledges the importance of improving economic activity rates at paragraph 2.9 of the Local Plan, recognising that there is an opportunity for economic growth to support the wider strategies of the Council in addressing improvements in some of borough's deprived neighbourhoods. This recognition is an important factor of the Council's economic growth strategy, which is embodied in **Strategic Objective 1** (page 4) of the Local Plan.

SO1 aims to create greater opportunities for all to access improved economic opportunities and to provide support for the local economy and a higher wage employment. To achieve this, the Council has recognised the need for a strategic approach to employment-led growth, which maximises potential of the M65 corridor.

Question 2: The assessment of employment growth set out in the Housing and Economic Needs Assessment 2021 (HBC2.003b), forecasts an employment land need of 59 ha over the period 2021-2037, updated in the Employment Land Background Paper (HBC8.002) to 70ha to 2040? Is this justified by the evidence?

In preparing the Local Plan, the Council has faced delays due to resourcing issues, as well as political change and national planning policy updates. Caddick has every sympathy with the Council in this process.

Caddick supports the extension of the plan period to 2040, and the Council's revised evidence base forecasts. The original HENA (HBC2.003a) produced by GL Hearn is out of date and based on data from 2016. The Council is therefore correct in undertaking an update to that original work, which also has regard to the extended plan period.

HBC2.003b confirms the employment land requirement as 59ha to 2037, but it also notes at Table 11.1 and paragraph 11.14 that 57 out of the 59ha is required for B2/B8 uses, with only a very modest requirement for office space.

HBC8.002 is the Council's background paper which notes the lack of employment land supply as context, a position recognised as far back in 2015, and with no interim solutions. The position is exacerbated by the lack of any Green Belt review in intervening years, compounding the supply problems and constraining economic growth.

Paragraph 2.1.3 of HBC8.002 notes that the Council updated its HENA review forecasts following Brexit and Covid, with an emphasis on employment floorspaces review. Table 1 and the calculations at paragraph 2.1.4.

The revised calculation resulting in an identified need for 70ha of employment land is an underestimate. We note this for two reasons, firstly the primary basis for the 2021 employment need calculations presented in Table 1 is past completion (2012-2020), which are well documented to have been constrained by an identified lack of available employment land supply across the borough. Therefore, they do not fully reflect the likely demand going forward. A more justified approach would be to have been to also consider labour market employment forecasts by sector. Secondly, the HENA has used a site coverage ratio of 40% for Industrial and

Warehousing land uses, which is at the higher end of what typical development would comprise, and which also makes up the majority of the land requirement.

As an example, we refer to EMP3. Caddick has considerable experience in developing large scale employment sites. It is its core business. In undertaking its own site-specific assessments at Altham, Caddick has prepared a suite of baseline assessments, examining landscaping, access, development platforms, heritage and ecology matters.

We provide a summary of the gross to net site calculations below, which concludes that the actual floorspace achievable on site, when considering the policy requirements set out in EMP3, would be in the region of 25% of the total site area.

EMP3 Area:	45.5 Hectares (allocation excludes woodland)
Western site (Caddick) area:	26 Hectares
Western site (Caddick) plateau area:	14 Hectares
Western site (Caddick) floor area:	55,000 - 65,000 m ² (600,000 - 700,000 sqft)
Western site (Caddick) efficiency:	21-25%

Looking at the allocation as a whole and including the “Watmore consent” and the potential of the eastern part, and again reflecting the relevant current policy wording, the allocation would achieve the following:

EMP3 Area:	45.5 Hectares
Whatmore consent floor area:	18,580 m ² (200,000 sqft)
Eastern site (no know developer) floor area:	31,000 m ² (335,000 sqft)
Western site (Caddick) floor area:	55,000 - 65,000 m ² (700,000 sqft)
Total site efficiency:	23-25%

Whilst detail designs will vary, the reality is that this employment site, which is typical of such sites and accounts for a significant proportion of Hyndburn’s proposed total employment land allocation, will achieve a much lower ratio than the Council’s assumed efficiency of 40%.

The implications are that the Council has underestimated the amount of land required to meet its economic growth aspirations. To make the Plan sound, the employment land requirement should be cited in the Local Plan as a **minimum**, to aid flexibility in the Local Plan, amending Policies SP1 and SP4 accordingly.

Question 3: What evidence is there that the target of 70ha of employment land over the Plan period is deliverable, bearing in mind past completion rates?

We refer to our answers to questions 1 and 2 above. Hyndburn has experienced decades of suppressed employment space provision and has a dearth of employment land. This has limited economic growth and pushed existing businesses and inward investment opportunities to look elsewhere.

Paragraph 2.2.5 of HBC8.002 concludes that delivery is realistic over the plan period, noting that on average 14,816 sqm per annum was delivered between 2012-2020. Indeed, the 70ha employment land requirement is based upon these suppressed completion rates.

Whilst that figure is a little dated, all of the Council's employment land reports point to a lack of supply and considerable demand.

Demonstrative of this latent demand, Frontier Park is the most recently active project within Hyndburn, with c.88,600 sqm of modern employment floorspace completed between 2019 and 2022, adjacent to junction 6 of the M65 near Whitebirk. This site now 94% let with no further land supply. There is no available land supply at Altham Business Park.

Employment take-up rates in Hyndburn are also skewed by the lack of sufficient sites coming forward over the last 20 years. As there is no land available, take up rates for built space will also be lower than typical rates from the region. For this reason, the Council is right to look towards wider evidence.

Appendices 1 and 2 of HBC8.002 includes extracts from the Council's 2019 Employment Land Study review by Aspinall Verdi, a leading chartered surveyor. Appendices 1 and 2 consider the market attractiveness of the two proposed strategic employment sites at Whitebirk and Altham, concluding that both sites would be very attractive to the market, with strong market demand.

This aligns with our client's own evidence prepared by national agency Knight Frank (March 2024) and appended to our Regulation 19 submissions. That evidence refers to low vacancy rates and a very limited supply of larger employment sites coming forward in both Hyndburn and across the M65 market area.

Given the passage of time since this submission, the client has since had this evidence updated in the form of a Market Overview report by Cushman & Wakefield (August 2025) (see Appendix A). This new report further supports the established argument, with an estimate 5.5% of built industrial floorspace in Hyndburn currently marketed as available compared to the national average and market equilibrium of 8%. There is currently no availability of Grade A space in Hyndburn and no units above 23,000 sqm (250,000 sq ft) across the whole of the M65 corridor. Industrial take up rates have averaged c.10,700 sqm per annum (2020-2024) in Hyndburn – a quantum that has not been achieved since 2022 and the completion of Frontier Park. Just 750 sqm was taken up by industrial occupiers in 2024 and 800 sqm to date in 2025.

The allocation of EMP3 will help to alleviate the dearth of industrial supply, meet unmet market demand and the identified employment land requirement.

Question 4: What is the identified supply of new employment land/floorspace over the Plan period? Should this be set out clearly in the Plan?

The overall strategy for employment land is clearly set out within the Local Plan, including the provision of new employment land allocations summarised in Policy SP4 and Table 1, where a total allocation of 94.4ha of gross employment land is identified. Chapter 10 of the Local Plan provides a breakdown of the Local Plan Areas, including identifying employment sites in each area, where relevant.

Whilst an overall schedule of existing employment sites, commitments and allocations would be helpful, we do not consider that this is fundamental to the soundness of the Local Plan. Especially since the existing sites are effectively built out.

In response to the Inspector's initial question IQ9, the Council has prepared a summary of completions and commitments since 2021 (see document H002). The Council's response to IQ9 sets out that there is a very limited supply of just 3ha of employment land supply since 2021, comprised of 2.91ha from completed developments, and 0.9ha from sites with planning permission.

Question 5: What assumptions have been made in assessing the availability and capacity of land for employment use? Does that include the potential to intensify the use of existing employment land? Conversely, has the potential loss of employment land to other uses been assessed and taken into account?

This is a question predominantly aimed at the Council. However, Hyndburn has a range of existing employment sites that are fully developed out and occupied, leaving a very limited amount of available employment land. As noted above, the existing supply is estimated at just 3ha.

Where land does remain available, it is not necessarily attractive to the market due to various factors including historical employment locations that no longer meet the needs of modern business occupiers and relatively small infill sites preventing the delivery of larger units.

In recognition of the fact that the quality and spatial distribution of employment land is an important as the quantum, the Council has undertaken a rigorous assessment of all employment land across the borough as to its suitability for accommodating the identified needs. Document HBC3.001a and HBC3.001e are supply based assessments undertaken by Turley and Aspinall Verdi, in both 2016 and 2019. While these documents are a few years old, they depict the good, adequate and poor level of employment land provision across Hyndburn (Fig 1.2 refers). Unsurprisingly, the existing Altham Business Park is classified as good, given its locational advantages, noting that it performs exceptionally well (para 1.10).

Notwithstanding this, the 2019 update makes it clear that overall, the borough has a challenging supply of employment land. Table 1.2 notes that 82% of supply is either adequate or poor, and paragraph 1.12 cites the industrial legacy of Hyndburn and the proliferation of an increasingly ageing stock of employment floorspace.

The findings of the 2019 update note no real change from the 2016 study. That includes several recommendations at section 9, with paragraph 9.23 clarifying that in order for Hyndburn to capture new investment and support the growth aspirations of its existing businesses, there is a need to consider providing a more readily available supply of unconstrained sites in accessible

locations. To be attractive to the market, employment land allocations must be in locations that best serve the needs of business occupiers, their customers and supply chains, and be of a quality that meets their operational requirements.

Question 6: What flexibility has been built into employment need and employment land supply calculations? Has this included a buffer to account for forecasting variation and market choice? If so, what assumptions have been made and are these justifiable? Has a buffer been included in forecast demand or supply, or both?

Policy SP4 and Table 1 of the Local Plan sets out a total allocation of 94.4ha of gross employment land. This is more than sufficient supply to meet the 70ha requirement and allows for an element of flexibility and choice within the market aligned with NPPF paragraph 86 (e).

In addition, we have set out our concerns above regarding the calculation of land take conversion to floorspace ratios. Caddick contends that the need of 70ha represents a *minimum* figure and by including the word minimum in the wording of Policy SP4, this would add greater flexibility into the Plan.

Given the demonstrable challenges in finding and releasing land in Hyndburn, and Green Belt constraints, the Council need to carefully monitor delivery of employment land. Should it find that a lack of employment land is being delivered, it may need to undertake an early review.

Question 7: To what extent has allocated employment land in Blackburn, including sites on the western fringes of Hyndburn, been taken into account in assessing employment land requirements and demand for sites in Hyndburn?

This is a question for the Council to respond to. However, we note that Hyndburn borough is relatively small in area, with the M65 corridor cutting east to west across. The Council has strong relationships with the neighbouring 'M65' local authorities including Blackburn with Darwen, and the connectivity enabled by junctions 6, 7 and 8 heavily influence the spatial growth strategy across this part of Lancashire.

Section 1.4 of HBC8.002 provides helpful narrative in explaining how important the M65 corridor is to both housing and economic growth in Hyndburn, noting that market demand is centred around these junctions. Paragraph 1.4.3 refers to other strategic growth and prosperity strategies which recognise the same spatial pattern, referring to the M65 as the economic spine of east Lancashire, which supports some 80% of jobs.

The existing employment areas in Blackburn and on the western fringes of Hyndburn align with this overall strategic approach. Frontier Park is perhaps the most relevant example of a successful development, but that is now completed, having first secured consent in 2015. There is no further land available in this part of the borough.

Additionally, the various prosperity strategies highlight the role of all three motorway junctions in the delivery of economic growth. Paragraph 1.4.2 recognised this, citing locations at junctions 6, 7 and 8 as of strategic importance.

Hyndburn and Blackburn with Darwen Borough Council have a strong track record in working together. Document HBC10.002 is a Statement of Common Ground (SoCG) between the parties.

Section 4 of the SoCG sets out how both authorities share a functional employment market area (and housing market area) and how they work together as part of the Pennine Lancashire Authorities' partnership. The Hyndburn approach to the amount of employment land and the selection of strategic employment sites is recognised in this SoCG.

The additional land allocated within Hyndburn's Local Plan will also seek to support wider economic growth and productivity, taking into account not just local needs but sub-regional and even regional opportunities for employment development. For example, there is an opportunity for EMP3 to meet a gap in the regional North West and Yorkshire markets for larger units in excess of 250,000 sq. ft in accessible locations given positioning on the M65 corridor and the growing local population.

Question 8: What factors have influenced the strategic distribution of employment land allocations? What alternative strategic sites have been considered and how do they compare to those selected for inclusion in the Plan?

We refer to our responses in Matter 4 above, document HBC8.002 and document HBC10.002. The Council has a soundly based approach to employment land distributions formulated in a cross-authority approach and enshrined in the wider growth and prosperity strategy.

The extent of the Green Belt, accessibility to the M65 via junctions 6, 7 and 8, meeting the market demands of modern business occupiers, and the opportunity to co-locate employment growth have influenced the site selection process. In the case of EMP3, the site has the added benefit of being close to the residential led regeneration of the former Huncoat colliery, bringing together jobs and homes.

Question 9: Does the economic strategy support the future vitality and viability of town, district and local centres?

Yes. The overall economic strategy seeks to bring about job growth and higher wage employment into the borough. This is coupled with a housing growth strategy and delivery of the Huncoat strategic site. A greater amount of economically active people living and working with the borough will support growth and regeneration in the town and district centres through increase footfall and spend.

Question 10: How does the economic strategy support the sustainable growth and expansion of businesses in rural areas?

While this question is predominantly aimed at discussing the rural economy, our client notes that the relatively small geographical area of Hyndburn, coupled with the high levels of accessibility afforded by the M65, are such that the strategic employment sites will support rurally based, smaller businesses (and vice versa). Businesses occupying the strategic sites and their labour force will create local supply chain demands and service requirements.

Question 11: Should the current economic growth predictions and uncertainty be taken into account in the economic strategy? What implications might there be for Hyndburn? Is the

economic strategy sufficiently flexible to cope with slower than expected economic growth?

Caddick has undertaken its own assessment of the state of the market in respect of employment demand and supply. Policy reform and Industrial Strategy announcements, coupled with falling interest rates present a positive long-term outlook for the economy. The manufacturing and 3PL sectors remain particularly active, and constrained supply has supported speculative industrial development and rental growth.

More locally, market demand is very strong stemming from both an inward investment and indigenous occupier perspective. Part of this is driven by pent up demand, with very little land being available over the last 5 - 10 years. Existing businesses are limited in their expansion plans. This has been evidenced at Frontier Park as when land became available it was quickly taken up and built out. There is no available land remaining for development at Altham Business Park. The Local Plan allocations propose extensions to these existing developments that have been market proven.

The scale and spatial distribution of employment allocations in Hyndburn are such that they can respond to changes in the type and quantum of economic growth predictions over the medium to long term.

Question 12: Where in the Plan does it set out the expectations for EMP1 and EMP2. What use classes would be acceptable on these sites? Should these two sites have a specific policy to outline the design, environmental and transport considerations?

No comment.

Question 13: The Employment Background Paper sets out that there is a need for around 2.41 ha of land for office uses, 19.88 ha for industrial uses and 47.76 ha of land for warehousing. To be effective, should the Policy set this out to prevent the disproportionate development of one type of employment use? Does there need to be greater clarity about the types and amounts of uses to be supported on the individual allocations?

The Council's position on the type of employment land required is soundly based. There is no need to prescribe land uses, which could affect inward investment opportunities. It is important to retain flexibility in the employment land supply to respond to market opportunities as they arise and so as not to constrain economic growth.

Question 14: The strategic allocations EMP3, EMP4, EMP5 and EMP6 are identified as being suitable for B2 and B8 uses. Where is it anticipated that the required land for office uses will be provided? Should there be some flexibility to allow other employment uses on the strategic allocations which may provide high quality jobs?

We refer to our response under question 16 below. Most modern B2 and B8 occupiers provide for a full range of job opportunities, many of which are highly skilled and high paid. Larger space users often include IT, HR, sales team, logistics planning functions, technicians, managerial roles and other 'company headquarters' jobs within the building. As a result, the floorspace

requirement can take circa 20-25% of the total floorspace, which is not an insignificant amount of floorspace with a generally high employment density. Many of these jobs require degree-level or higher qualifications, are higher paid, therefore can be considered as 'high quality'.

We do not believe that the policy wording of EP1 – EP4 is designed to prevent such jobs from coming forward on the allocated sites, and such matters are usually discussed proactively at the development management stage. However, should the Inspector or Council require further clarity, those policies could refer to B2, B8 and ancillary development.

Policy SP4 Employment Provision and Strategic Sites

Question 15: The Policy sets out that 70 ha of land for employment uses will be provided over the Plan period. In the interest of effectiveness, bearing in mind the gross site areas in Table 1, should the Policy state the gross and net figures?

While we have no specific objections to the inclusion of such a table, we would refer to our comments under question 2 above regarding the assumptions used in the land to floorspace ratios.

There is no 'standard' approach for calculating gross to net employment site areas as this will be influenced by very site-specific constraints. As such, it may not be appropriate or consistent to state net figures where they are not known.

Question 16: Policy SP4 in part 2 states that the Council preference is to support a higher proportion of uses which generates a greater number of jobs. In the event of a disproportionate number of B8 jobs coming forward, the Policy states that the Council will review its policy position. Is this section of the Policy positively prepared and is it effective? What steps does the Council intend to take to address this situation if it occurs?

Our Regulation 18 and 19 submissions raised objections to the inclusion of part 2, which we consider is unsound and should be omitted. Whilst we fully understand that Hyndburn wishes to create a strong and vibrant workforce, with a range of employment opportunities at all levels, there is no specific evidence available to suggest that there is any existing problem of a disproportionate level of B8 jobs in the borough. According to the ONS, Hyndburn has a relative specialism in manufacturing employment relative to the national picture (LQ of 1.81 in 2021) and is broadly in line in terms of transport and storage employment (LQ of 1.02).

Paragraph 2.9 and 2.10 of the Local Plan rightly identify that GDP in Hyndburn remains relatively low in comparison to regional and national trends and that there is a relatively high number of economically inactive people. It also states that the average gross annual pay of those working in Hyndburn is significantly higher than those who live in the Borough, indicating that higher paid jobs in the area are occupied by people who are in-commuting and do not live in the Borough. The Council is therefore keen to target the benefits and opportunities of new investment and economic growth towards deprived neighbourhoods. These general objectives are supported. However, it would be entirely illogical to then seek to introduce an arbitrary mechanism to monitor and potentially restrict B8 job growth, which might be of a skill or entry level to help economically inactive people get back into work and provide opportunities of upskilling.

We refer to our response to question 14 above. Most modern occupiers create a wide variety of jobs in terms of skills and pay from B2 and B8 land uses. Such premises often function as the headquarters for businesses which attract, retain and upskill employees to meet their needs. Further, the ongoing digitalisation of supply chains is creating demand for new skill sets. It is unjustified to assume that B8 jobs are somehow homogeneous, unskilled or of low value.

Beyond the above objections, it is unclear how the Council could either monitor or manage the actual categorisation of jobs resulting from a proposed development scheme. Unjustified interventions could adversely impact both inward investment and economic growth within Hyndburn.

Ultimately, on account of viability constraints and occupier demand, limiting the delivery of B8 development and therefore jobs in the sector, could risk the delivery of any new job creation on some sites within Hyndburn to the detriment of all economic growth aspirations.

Question 17: Part 3 of the Policy refers to the East Lancashire Rail Freight Terminal and states that suitable access arrangements will need to be identified. Is this section of the policy effectively worded? What access arrangements could be possible and does this raise any consequential implications that the Plan should address?

No comment.

Policy SP5 Protection, Modernization and Development of Employment sites

Question 18: Part 2 of the Policy identifies the strategic employment hubs illustrated in the Key Diagram and states that they will be supported to grow in line with Policy SP4. Is it clear to developers, decision makers and the community how this will be achieved?

Given the Green Belt constraints and lack of any available land at the identified locations, part of 2 of SP5 clearly relies upon the proposed allocation land to be released.

Question 19: Part 3b of the Policy concerns adequate quality employment sites. Is there contradiction and/or duplication between the requirements of paragraphs 2-4 of Policy DM1 and sub sections i-iii of this part of the Policy? Is the Policy effectively worded?

No comment.

Question 20: Part 4 of the Policy states that proposals for the redevelopment of existing employment sites away from a B use class to one that retains some form of significant employment on the site will be considered more flexibly? What does 'flexibly' mean in this context. Would the policy wording be more effective if the word favourably was substituted as referenced in the supporting text?

No comment.

Question 21: In the Schedule of proposed minor modifications (HBC1.006) it is proposed to remove the last sentence of part 4 of the policy, 'The development of retail uses on employment sites will not be supported'. Is this justified?

No comment.

Question 22: Is reference to the Framework (Agent of Change principle) necessary for effectiveness in part 6 of the Policy?

No comment.

Policy SP6 Centre Hierarchy, Strategy and Retail Provision

Question 23: Are the town and local centre boundaries shown on the Policies Map justified? Have they been reviewed?

No comment.

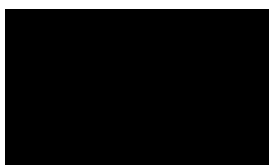
Question 24: Should the Policy give greater recognition of the leisure and commercial uses at Hyndburn Retail Park and the potential role of the site in adding to the commercial attractiveness of the planned employment allocations?

No comment.

Question 25: In terms of the retail hierarchy is there justification for identifying Hyndburn Retail Park as a 'centre'?

No comment.

Yours sincerely,



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LAND SOUTH OF ALTHAM BUSINESS PARK, HYNDBURN

MARKET OVERVIEW

August 2025

Better never settles



INTRODUCTION

Purpose of this Report

This report provides a high-level overview of the current and anticipated industrial and logistics land and property market characteristics that are impacting upon the supply and demand for space in Hyndburn and the wider M65 corridor and sub-regional market areas.

It is intended to evidence and inform the need for the proposed employment land allocation at Land South of Altham Business Park (EMP3) through the Examination in Public of the Hyndburn 2040: Local Plan (Strategic Policies and Site Allocations) and respond to the Planning Inspector's questions through the relevant Hearing Statements being prepared by Caddick Land and Marrons.

As a whole, EMP3 represents an opportunity to provide a significant contribution (45.5 hectares) to Hyndburn's evidenced employment land requirement (70 hectares) for the Local Plan period (2021-2040).

The market overview has been prepared by global property advisors Cushman & Wakefield, with specialists in the North West industrial and logistics market combining robust industry standard data sources with local knowledge and experience.

ECONOMIC AND MARKET CONTEXT

National Logistics and Industrial Market Context

Cushman & Wakefield's latest review of the UK logistics and industrial market provides a useful context to the broad market trends that will continue to influence the demand for land and premises nationally over the coming years, including in Hyndburn over the local planning period. The key messaging can be summarised as follows:

- **Occupier demand for space** – has witnessed a significant improvement nationally in 2025 to date as measured by the quantum of space taken up (16.8m sq ft). Growth has been driven by demand for larger warehousing premises (200,000+ sq ft) by the third-party logistics and distribution sector (3PL) which includes the likes of DHL, GXO and Whistl.
- In contrast, North West occupier take up fell marginally over the same period (6%) with a notable absence of transactions (lettings or purchases) for premises within the larger size bracket. However, this may be reflective of a constrained supply of larger units rather than a lack of demand as regionally both manufacturing (particularly food) and 3PL sectors have remained particularly active.
- **Supply of available industrial space** – has risen to its highest level nationally since 2011 (74m sq ft) supported by continued new development in the most attractive and accessible locations such as the Midlands. In the North West, available supply has increased 15% in 2025 to date (to 11.4m sq ft) but has been driven by several poorer quality second-hand buildings returning to the market. These units are less attractive to occupiers owing to their lower sustainability credentials and cost to bring up to efficient standard.
- **Rental growth** – stands at around 3.5% per annum nationally reflecting the on-going re-balancing between supply and demand factors.

DRIVERS OF OCCUPIER DEMAND

Regardless of economic trends, occupier demand will continue to be driven by a series of primarily generic factors:

Location

Access to customers, supply chains and staff.

e.g. Strategic highways for logistics, plentiful skilled labour for advanced manufacturing.

Availability of Space

Right quality and size of space, right time and acceptable cost

A mix of suitable and available sites and premises to attract, retain and grow businesses.

Incentives and Intervention

Public sector as enabler

Particularly through pro-active and supportive planning system as financial incentives limited.

Sustainability

Legislative targets, enhanced build standards, impact on running costs

Of increasing importance to meet corporate and social responsibilities. Impacting on “flight to quality” space.

Digitalisation

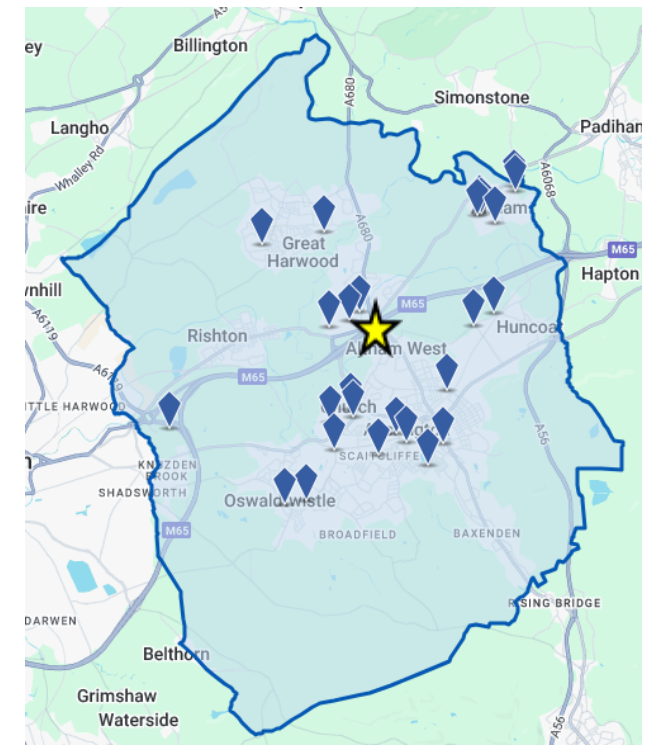
Increased automation in production and supply chains

Improving efficiencies across all sectors, increasing need for energy and digital infrastructure, and changing locational assumptions.

LOCAL SUPPLY SIDE CHARACTERISTICS

Marketed Industrial Availability

- **Strategic location** - Hyndburn borough sits centrally within the wider M65 corridor - a functional market area in Lancashire with links extending towards northern Manchester and connecting the M6 to Yorkshire.
- **Low availability rate** – There is an estimated 10.75 m sq ft of industrial built space within Hyndburn. However, just 27 properties totalling 590,900 sq ft and equating to 5.5% of this space is marketed as available for occupation - lower than the national average / market equilibrium of 8% indicating limited market choice and an inability for businesses to grow or move locally.
- **Historic spatial distribution** – Hyndburn’s marketed supply is well distributed amongst its towns, with the largest cluster in Accrington, reflective of the rich industrial heritage and the need to locate close to large labour pools, canals and rail. Modern industrial occupiers increasingly prioritise strategic motorway connectivity and public transport networks.
- **Dated second-hand stock** – None of Hyndburn’s available units are of new or refurbished “Grade A” quality meaning that those seeking modern industrial premises must look outside of the Borough to meet their business requirements.
- **Small unit sizes** – Marketed industrial units are relatively small in size averaging c.22,000 sq ft in both geographies. This may be limiting the attraction of larger occupiers to the area and the ability for existing occupiers to grow.



Availability	Hyndburn	M65 Corridor
Grade A	0	270,700
Grade B	558,470	1,899,670
Grade C	32,430	680,940
Total (Sq Ft)	590,900	2,851,310
No. Properties	27	129
Avg. Size	21,885	22,103
Avg. Rent (£psf)	£6.10	£6.50

Source: CoStar; Cushman & Wakefield

LOCAL SUPPLY SIDE CHARACTERISTICS

Modern Industrial Supply – The Gap in the Market

There is an evidenced dearth of available modern, high quality industrial supply within Hyndburn. The majority of supply in the wider M65 Corridor is also lower grade and clustered around the larger industrial towns of Burnley and Blackburn. Where more recent developments have been delivered, they provide an indicator of the latent demand and market need for the type and scale of modern industrial space that the proposed allocation at Land South of Altham Park could supply:

Altham Business Park

Situated in Hyndburn adjacent to the proposed allocation and fully developed out. The Park provides a mix of unit sizes and quality. Latest scheme completed in 2022 providing smaller units that let quickly achieving c.£11 psf.

6 units totalling 89,500 sq ft currently marketed following the relocation of Stolle Manufacturing to new space at Frontier Park (Burnley) as they were unable to find Grade A expansion space in Hyndburn.



Whitebirk Industrial Estate

Established industrial location (with trade-counter and retail) on the eastern edge of Blackburn straddling the A6119 and Blackburn/Hyndburn boundary with good connectivity to J6 of M65.

Greenbank Technology Park is an infill scheme of small units (1,900 sq ft to 8,000 sq ft) due for completion in 2025.

This represents the only Grade A stock available locally and is of small scale.



Frontier Park, Blackburn

Situated at J6 of M65 adjacent to Whitebirk.

Delivered 2019-2022 in phases. Totalling 945,000 sq ft across 18 units (6,100-161,000 sq ft). The only modern large scale employment development delivered in M65 Corridor in recent years. No room left for development.

Strong tenant uptake including MDA, Royal Sanders, Fagan & Whalley.



Advance Point Business Park, Burnley

One of the few schemes in M65 Corridor with Grade A space available.

Recently completed (2025) a 22 unit scheme totalling 98,000 sq ft. 7 units currently available ranging from 5,900-10,500 sq ft – relatively small scale.

Highest asking rent c.£10/ sq ft



LOCAL DEMAND SIDE CHARACTERISTICS

Occupier Take-Up Rates (Transactions)

Take up rates provide a useful indication of the strength of occupier demand, particularly when considered in the context of existing supply, as transactions are reliant upon suitable size and quality space being available, in the right location, at an appropriate price point and specific point in time. They do not account for latent demand from occupiers seeking to invest, expand or relocate but unable to find suitable space.

- **Low annual take-up rates** – c.115,000-130,000 sq ft per annum of industrial floorspace has been taken up in Hyndburn by occupiers over the last 5-10 years. This is a low rate, reflective of the generally smaller size units available and could be skewed by a single transaction of scale.
- **Impact of new supply on take-up rates** – Hyndburn’s industrial take up was considerably higher between 2019 and 2022, averaging 217,330 sq ft per annum. This could have been influenced by the covid-19 pandemic that raised demand for space in supply chains; but compared to the wider M65 Corridor pattern which witnessed consistently higher take-up rates prior to this, was most likely driven by the delivery of new high quality industrial space of scale at Frontier Park delivered over this period.
- **Impact of constrained supply on take-up rates** – Following completion of Frontier Park in 2022 and coupled with the evidenced lack of supply of available modern industrial premises in the Borough, take up rates fell dramatically. Just 7,780 sq ft was taken up in 2024, a tiny fraction of previous years. Whilst take up rates also fell across the M65 Corridor in 2024, they have remained much more consistent over the years supported by the supply position.
- **Small size units** - The average unit size across both geographies has been relatively small at c.14,000 sq ft, again preventing new tenants of scale entering the local market or existing tenants the ability to grow and expand, and impacting on total take-up rates.

Take Up	Hyndburn	M65 Corridor
2015	11,822	1,667,696
2016	210,630	1,436,081
2017	73,035	1,551,275
2018	46,377	1,020,001
2019	355,266	932,229
2020	149,424	499,735
2021	126,725	562,069
2022	237,892	906,179
2023	52,058	994,056
2024	7,780	498,779
2025 (YTD)	8,741	323,778
Total (2015-24)	1,271,009	10,068,100
10 Yr Avg	127,101	1,006,810
5 Yr Avg	114,776	724,544

Source: CoStar; Cushman & Wakefield

Largest lettings - Blackburn and Burnley:

- Frontier Park, Blackburn: 164,000 sq ft new build to Science in Sport (2022)
- Harwood Street, Blackburn: 153,000 sq ft former wallpaper mill to Euro Paper for expansion (2025)
- Frontier Park, Burnley: 158,000 sq ft new build to Stolle Machinery (2024)
- Walker Industrial Estate, Blackburn: 128,000 sq ft to 3A Composites (2023)
- Bancroft Road, Burnley: 175,000 sq ft to BBQ manufacturer Rectella International (2022)

CONCLUSIONS

Bringing Supply and Demand Together

The key market messaging presented in this overview can be summarised as follows:

- **Strategic location** – Hyndburn is not currently a significant industrial location in terms of scale but has the attributes to be a larger player within both the M65 corridor and wider region given locational benefits and strategic connectivity.
- **Severely constrained supply** – There is a long-standing dearth of built employment space available within Hyndburn with choice limited to smaller scale, lower quality or dated stock and often in historical industrial locations that no longer meet modern occupier requirements. The existing employment land allocations in the Borough are also now largely fully built out leaving limited scope for new supply for come forward.
- **Low occupier take-up** – Occupier transactions provide an indication of local demand but have been severely constrained over the last 10 years by the lack of available supply of any scale or quality. In the years where new supply has been delivered at scale, Hyndburn's occupier take up rates have reflected the latent demand for space.
- **Demonstrable latent demand** - Where new supply has been delivered, for example at Frontier Park (Blackburn), it has proven successful having been delivered speculatively at risk and attracting a wide range of occupiers.
- **Lack of choice** - As a result, occupiers must choose to remain within unsuitable business accommodation or be lost from the Borough. For example, Stolle Machinery are relocating from Altham Business Park to new premises at Frontier Park (Burnley) due to the lack of suitable premises in Hyndburn meaning 200 jobs and c.£20m private investment are lost.

CONCLUSIONS

- **Gaps in the market** – There is no availability nor take up of larger units in excess of 250,000 sq ft for the last 5 years indicating a potential gap in the market to serve not just local but regional supply chain needs. The proposed Altham Park allocation is one of the few sites in the M65 Corridor with the capacity to deliver units of such scale.
- **Land South of Altham Park** – The proposed allocation has the locational attributes and scale to appeal to a wide range of occupiers and flexibly respond to market demand in terms of unit size and specification. It is able to make a significant contribution to Hyndburn’s evidenced employment land requirement over the Plan Period and overcome the dearth of available supply that has persisted for many years.
- **Deliverability** – Caddick Land control a large proportion of the proposed allocation. They are experienced and capable developers with the capacity and resources to deliver the Altham Park scheme on the ground, presenting the greatest chance of securing the much-needed new employment space in Hyndburn.
- **Supporting economic growth aspirations** – The M65 corridor provides easy access to the growing populations of Lancashire, Greater Manchester and the wider region. Additional employment land is required to deliver the space needed to support the planned housing, employment and economic growth aspirations set out within the Hyndburn Local Plan submission and wider strategic documents. The proposed allocation is required to deliver this aspiration.