



Belfast Local Development Plan

Employment

Monitor Report 2022/23

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1 Introduction

As part of the preparation of a new Local Development Plan (LDP) for Belfast, the Strategic Planning Policy Statement (SPPS) for NI (September 2015) states that “a system to monitor the take up and loss of land allocated for economic development purposes should be implemented.”

The primary purpose of the employment monitor is to inform the formulation of the council’s new LDP. However, it will also help the council identify and track changes in the potential land supply across the city.

The information collated will allow a clear view of the overall progress in meeting the employment objectives of the emerging development plan and in identifying issues likely to require intervention.

The Planning Act (NI) 2011 requires the council to make an annual report to the Department for Infrastructure outlining the extent to which the objectives set out in the LDP are being achieved. Although the new plan is not yet adopted it is still important to report on the availability and take-up of employment land in advance of the full LDP adoption.

2 Methodology

This section will explain the data collection methods used to analyse employment land availability within the district. It provides information relating to employment land data between 01 April 2022 and 31 March 2023. An analysis has been undertaken of all new sites with planning approvals within the periods stated above. The survey identifies and records sites that have been completed, sites that are currently under construction and sites with outstanding planning permission, yet to be implemented. Any existing employment land which was lost to non-employment uses during the monitoring year has also been recorded. Sites identified for the purposes of this report are those that fall within Class B of the Use Classes Order. These are defined as:

Class B1a	General offices
Class B1b	Call centres
Class B1c	Research and development
B2	Light industry
B3	General industry
B4	Storage and Distribution

The methodology has been revised since the publication of the last report to allow for more accurate reporting which removes the risk of double counting yields where there is more than one extant approval on a site. The monitor also captures instances where there is a loss and a gain of employment floorspace as part of the same proposal.

The process followed to produce the employment land monitor is summarised at Appendix A.

The Monitor presents a register of potential employment land, based on current planning policy designations and planning permissions¹. It is the role of an Urban Capacity Study (UCS) and the Employment Land Review which will be undertaken from time to time, to assess the suitability, availability and achievability of monitored sites to contribute to a viable supply of land.

3 Limitations

The figures included in this document do not include all development. It should therefore be assumed that some refurbishments and other permitted development have been developed and are not included in this document as there is no requirement for such works to be subject to the planning process. Where there has been an application permitted which includes intensification of an existing employment site, i.e. an extension or additional floor to existing employment building, only net additional floorspace is recorded as the site area already exists and would be misrepresentative.

It must also be recognised that the site area for planning applications expressed in hectares has been reduced in some instances to reflect only the site and not the access arrangements as this would have the potential to give misleading results. In a small number of schemes, the floorspace figures were not readily available and estimates of the floorspace gained or lost has been provided based on the existing building footprint and the number of storeys. Due to rounding, numbers presented throughout this report may not add up precisely to the totals provided.

¹ For the purposes of the employment monitor, the draft Belfast Metropolitan Area Plan (BMAP) 2015 is utilised rather than the former Belfast Urban Area Plan (BUAP) 2001. The adopted BMAP was quashed as a result of a judgement in the Court of Appeal delivered on 18 May 2017 and, although this means the BUAP is now the statutory development plan for the area, the draft BMAP, in its most recent, pre-examination, form remains a significant material consideration in future planning decisions. Draft BMAP therefore refers to that which was purported to be adopted and not the pre-examination draft published in 2004.

4 Overview

The following summary tables detail the uptake and loss of employment space for the monitoring period (01 April 2022-31 March 2023). The position at the 31 March 2023 in terms of the remaining supply of vacant employment land and as well as committed floorspace gains through extant planning permission for B use classes balanced against committed losses (extant planning permission for alternative uses) for Belfast district is also included.

4.1 Belfast LGD overview 01 April 2022 - 31 March 2023

Table 1 provides a breakdown for the completed gains and losses in employment land over the monitoring year period of 01 April 2022 to 31 March 2023. The total amount of floorspace completed was 60,422m². The majority of this was in use class B1(a) general offices. The total amount of completed employment floorspace lost to non-employment uses over the monitoring period was 3,826m². The net change between completed losses and gains was +56,596m².

4.2 Belfast LGD extant and under construction overview

Table 2 and Figure 1 set out the completions (gains and losses) across two monitor periods (2021/22 and 2022/23) to give an indication of the annual average and the net changes across a greater time period.

4.3 Belfast LGD extant and under construction overview

Table 3 provides overall totals for schemes where development is on-going and where planning permission remains extant on 31 March 2023. Under construction schemes at the 31 March 2023 have the potential to deliver approximately 28,642m² of new floorspace. The completion of all schemes yet to start has the potential to deliver approximately 479,565m² of new employment floorspace. Further analysis of the extant permissions demonstrates that approximately 384,272m² consist of B1(a) general offices.

4.4 Belfast LGD completions (gains) and remaining capacity by location

Table 4 and Figure 2 set out the completions (gains) by location over the period 01 April 2022 to 31 March 2023. It also sets out the remaining capacity by way of extant planning permissions for employment use by location and areas of developable land within existing employment locations (that is, land where there is no development under construction or that does not have an extant planning consent). In line with best practice a 40% building to plot ratio was applied to these areas to reflect the servicing, parking and landscaping requirements. As of the 31 March 2023 there is approximately 238,432m² of vacant land suitable for employment purposes.

4.5 Belfast LGD completions (losses) and remaining potential losses by location

Table 5 outlines the completed (losses) by location over the period 01 April 2022 to 31 March 2023. It also sets out the remaining potential losses of employment uses to non-employment uses if all extant planning permissions are realised. These extant planning permissions are located mostly within the city centre and the rest of the city.

4.6 Mixed use sites remaining capacity

There are four sites zoned for mixed use in draft BMAP (table 6). The yields for Titanic Quarter (BHA01) and Lands at Monagh By-Pass / Upper Springfield Road (BT 002) are captured in table 2 as they consist of extant planning permissions or development under construction. The yields on the remaining two mixed use zonings have been captured from their respective masterplans.

5 Summary tables

Table 1: Completions for monitor period 01 April 2022 to 31 March 2023

	Office (B1A)		Call centres (B1B)		R & D (B1C)		Light industry (B2)		General Industry (B3)		Storage & Distribution (B4)		Total	
	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2
Completed (gains) 01/04/2022-31/03/2023	3.9	35,601	0.0	0.0	1.6	11,714	3.7	9,115	0.0	0.0	2.8	3,992	12	60,422
Completed (losses) 01/04/2022-31/03/2023	0.2	2,640	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1,186	0.2	3,826
Net Change	3.7	32,961	0.0	0.0	1.6	11,714	3.7	9,115	0.0	0.0	2.7	2,806	11.8	56,596

Table 2: Completions for 2021/22 and 2022/23 monitor periods

	Office (B1A)		Call centres (B1B)		R & D (B1C)		Light industry (B2)		General Industry (B3)		Storage & Distribution (B4)		Total	
	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2
Completed (gains) 01/04/2021-31/03/2023	11.3	62,656	0.0	0.0	1.6	11,714	3.7	9,115	0.0	0.0	3.2	4,284	20	87,769
Annual Average	6	31,328	0.0	0.0	0.8	5,857	1.9	4,557.5	0.0	0.0	1.6	2,142	10	43,884.5
Completed (losses) 01/04/2021-31/03/2023	0.5	7,538	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	2,267	0.6	9,805
Annual Average	0.3	3,769	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1,133.5	0.3	4,902.5
Net Change	11	55,118	0.0	0.0	1.6	11,714	3.7	9,115	0.0	0.0	3	2,017	19.3	77,964

Figure 1: Completions by Use Classes across monitor periods 2021/22 and 2022/23 (m²)

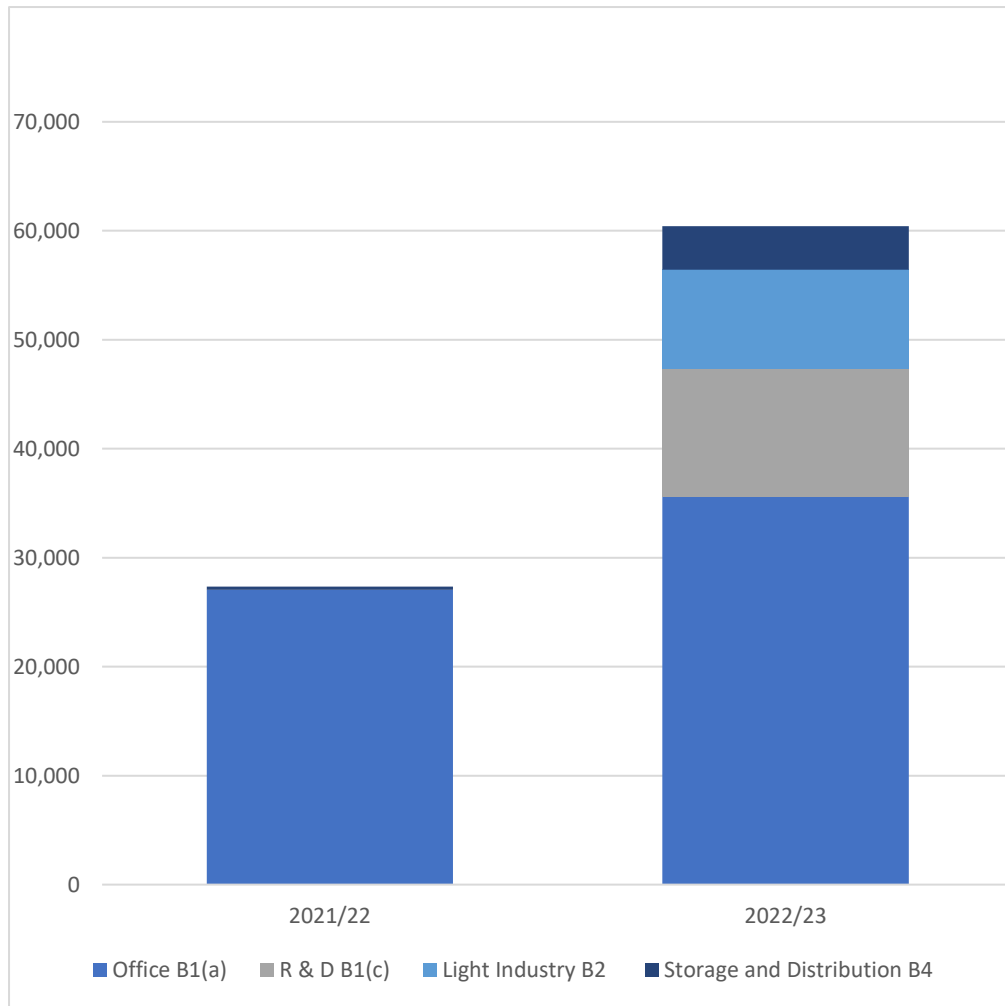


Figure 2: Completions (gains) by location across monitor periods 2021/22 and 2022/23 (%)

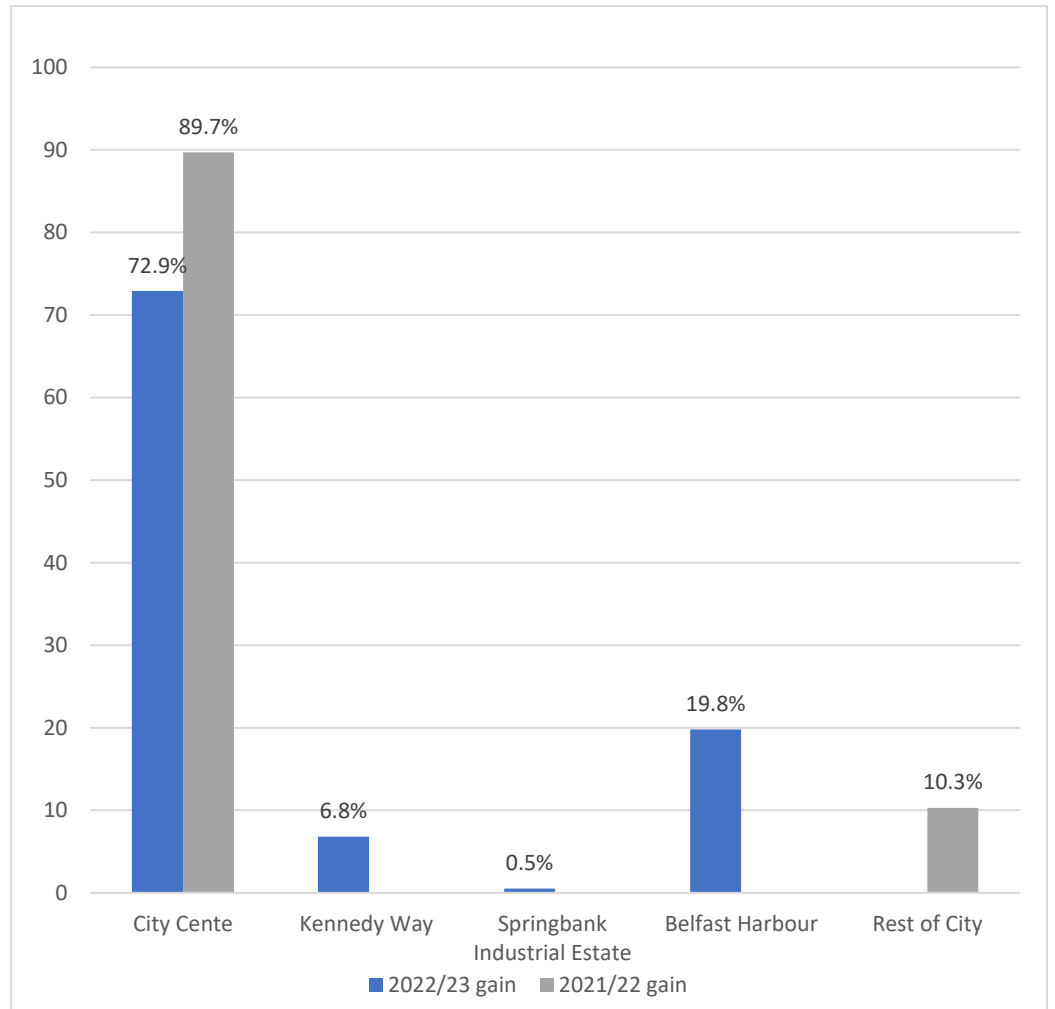


Table 3: Development under construction, extant permission (gain and losses)

	Office (B1A)		Call centres (B1B)		R & D (B1C)		Light industry (B2)		General Industry (B3)		Storage & Distribution (B4)		Vacant employment land		Total	
	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2	Area (Ha)	m2
Development on-going at 31/03/23	5.7	23,289	0.0	0.0	0.0	0.0	1	4,200	0.0	0.0	0.2	1,153	*	*	6.9	28,642
Not started gains - Full & Outline at 31/03/23	75.9	384,272	11.8	1,150	12.7	8,948	51.5	29,841	42.8	32,605	14.1	22,749	*	*	208.8	479,565
Sub-total	81.6	407,561	11.8	1,150	12.7	8,948	52.5	31,445	42.8	32,605	14.3	23,902	*	*	215.7	508,207
Losses not started at 31/03/23	4.8	25,728	0.1	1,868	0.1	381	2.8	10,638	2.4	6,800	10.6	26,964	0.7	2,844	21.5	75,223
Net Total	76.8	381,833	11.7	-718	12.6	8,567	48.7	19,203	40.4	25,805	3.5	-4,215	-0.7	-2,844	203.2	419,018

*For vacant employment land not covered by an existing planning consent please refer to table 4.

Table 4: Completions (gains) and remaining potential gains by location

Ref No	Location	Completions (m ²)		Remaining Capacity (m ²)	
		01-04-2022 to 31-03-2023	01-04-2021 to 31-03-2022	Remaining potential from extant permissions and under construction	Remaining potential from vacant developable land
CC	City Centre	32,741	26,987	319,772	0
ML 08	KILWEE INDUSTRIAL ESTATE, DUNMURRY	0	0	0	811
BT 005/05	HILLVIEW ROAD	0	0	3,543	1,416
BT 005/19	BALLYGOMARTIN INDUSTRIAL ESTATE, BALLYGOMARTIN ROAD	0	0	0	1,488
BT 005/10	GLENBANK BUSINESS PARK, CRUMLIN ROAD	0	0	0	11,988
BT 005/25	NORTH HOWARD LINK	0	0	0	0
BT 005/15	KENNEDY WAY	3,438	68	1,258	0
BT 005/04	CASTLEREAGH ROAD	0	0	0	2,423
MCH 09	PRINCE REGENT ROAD	0	0	4,412	0
ML 07	SPRINGBANK INDUSTRIAL ESTATE	221	0	1,606	35,199
BT 005/13	RAVENHILL BUSINESS PARK	0	0	0	0
BT 005/09	SHORE ROAD/SKEGIONEILL STREET	0	0	0	629
BT 004	LAND AT SPRINGFIELD ROAD (FORMER MACKIE'S SITE)	0	0	0	50,782
BT 005/11	DONEGALL ROAD	0	0	0	0
BT 005/08	DUNCAIRN GARDENS	0	0	1,618	0
BHA 06	BELFAST HARBOUR	9,932	0	47,287	183,727
BT 005/17	WESTLINK ENTERPRISE CENTRE, DISTILLERY STREET	0	0	0	1,281
MCH 10	MONTGOMERY ROAD	0	0	10,919	0
BT 005/20	LANARK WAY	0	0	0	641
BT 005/07	YORK ROAD INCLUDING JENNYMOUNT BUSINESS PARK	0	0	563	0

BT 005/12	STOCKMANS WAY	0	292	44	0
MCH 11	BALLYGOWAN ROAD	0	0	0	0
BT 005/02	ISLAND STREET/BALLYMACARRETT ROAD	0	0	0	331
BT 005/21	ARGYLE BUSINESS PARK, SHANKILL ROAD	0	0	0	0
BT 005/01	NEWTOWNARDS ROAD/TAMAR STEET	0	0	0	0
BT 005/18	SPRINGFIELD ROAD	0	0	4,310	5,107
BT 005/22	AGNES STREET INDUSTRIAL ESTATE	0	0	456	0
BT 005/03	EAST BELFAST ENTERPRISE PARK	0	0	0	0
BT 005/23	LOUDEN STREET/TOWNSEND STREET	0	0	0	0
BT 005/16	WHITEROCK INDUSTRIAL ESTATE, SPRINGFIELD ROAD	0	0	13,177	6,652
BT 005/26	CONWAY STREET	0	0	0	0
BT 005/06	CAMBRAI STREET	0	0	310	0
BT 005/24	ANDREWS MILL, DIVIS STREET	0	0	0	0
BT 005/14	GLEN ROAD	0	0	20	0
ML 05	SEYMOUR INDUSTRIAL ESTATE	0	0	0	3,598
ROC	Rest of City	0	0	17,913	0
BHA 01	TITANIC QUARTER	14,080	0	*	*
ODL	Outside Development Limit	0	0	3,288	0
	Total	60,412	27,347	430,496	306,073
		Total		736,569	

*See Table 6 for remaining capacity at BHA 01 Titanic Quarter.

Table 5: Completions (losses) and remaining potential losses by location

Ref No	Location	Completed losses (m ²)		Remaining potential losses (m ²)
		01-04-2022 to 31-03-2023	01-04-2021 to 31-03-2022	Remaining commitments at 31-03-2023
CC	City Centre	3,320	4,898	27,043
ML 08	KILWEE INDUSTRIAL ESTATE, DUNMURRY	0	0	0
BT 005/05	HILLVIEW ROAD	0	0	5,028
BT 005/19	BALLYGOMARTIN INDUSTRIAL ESTATE, BALLYGOMARTIN ROAD	0	0	0
BT 005/10	GLENBANK BUSINESS PARK, CRUMLIN ROAD	0	0	0
BT 005/25	NORTH HOWARD LINK	0	0	0
BT 005/15	KENNEDY WAY	0	0	0
BT 005/04	CASTLEREAGH ROAD	0	0	0
MCH 09	PRINCE REGENT ROAD	0	0	800
ML 07	SPRINGBANK INDUSTRIAL ESTATE	0	0	0
BT 005/13	RAVENHILL BUSINESS PARK	0	0	93
BT 005/09	SHORE ROAD/SKEGIONEILL STREET	0	0	0
BT 004	LAND AT SPRINGFIELD ROAD (FORMER MACKIE'S SITE)	0	0	0
BT 005/11	DONEGALL ROAD	0	0	0
BT 005/08	DUNCAIRN GARDENS	0	0	381
BHA 06	BELFAST HARBOUR	0	0	5,129
BT 005/17	WESTLINK ENTERPRISE CENTRE, DISTILLERY STREET	0	0	0
MCH 10	MONTGOMERY ROAD	0	0	2,531
BT 005/20	LANARK WAY	0	0	0
BT 005/07	YORK ROAD INCLUDING JENNYMOUNT BUSINESS PARK	0	0	0
BT 005/12	STOCKMANS WAY	0	0	561
MCH 11	BALLYGOWAN ROAD	0	0	0
BT 005/02	ISLAND STREET/BALLYMACARRETT ROAD	0	0	0
BT 005/21	ARGYLE BUSINESS PARK, SHANKILL ROAD	0	0	0
BT 005/01	NEWTOWNARDS ROAD/TAMAR STEET	0	0	956

BT 005/18	SPRINGFIELD ROAD	0	0	3,940
BT 005/22	AGNES STREET INDUSTRIAL ESTATE	0	0	0
BT 005/03	EAST BELFAST ENTERPRISE PARK	0	0	0
BT 005/23	LOUDEN STREET/TOWNSEND STREET	0	0	0
BT 005/16	WHITEROCK INDUSTRIAL ESTATE, SPRINGFIELD ROAD	0	0	271
BT 005/26	CONWAY STREET	0	0	0
BT 005/06	CAMBRAI STREET	0	0	1,672
BT 005/24	ANDREWS MILL, DIVIS STREET	0	0	0
BT 005/14	GLEN ROAD	0	0	0
ML 05	SEYMOUR INDUSTRIAL ESTATE	0	0	0
ROC	Rest of City	506	0	27,723
Total		3,826	4,898	76,128

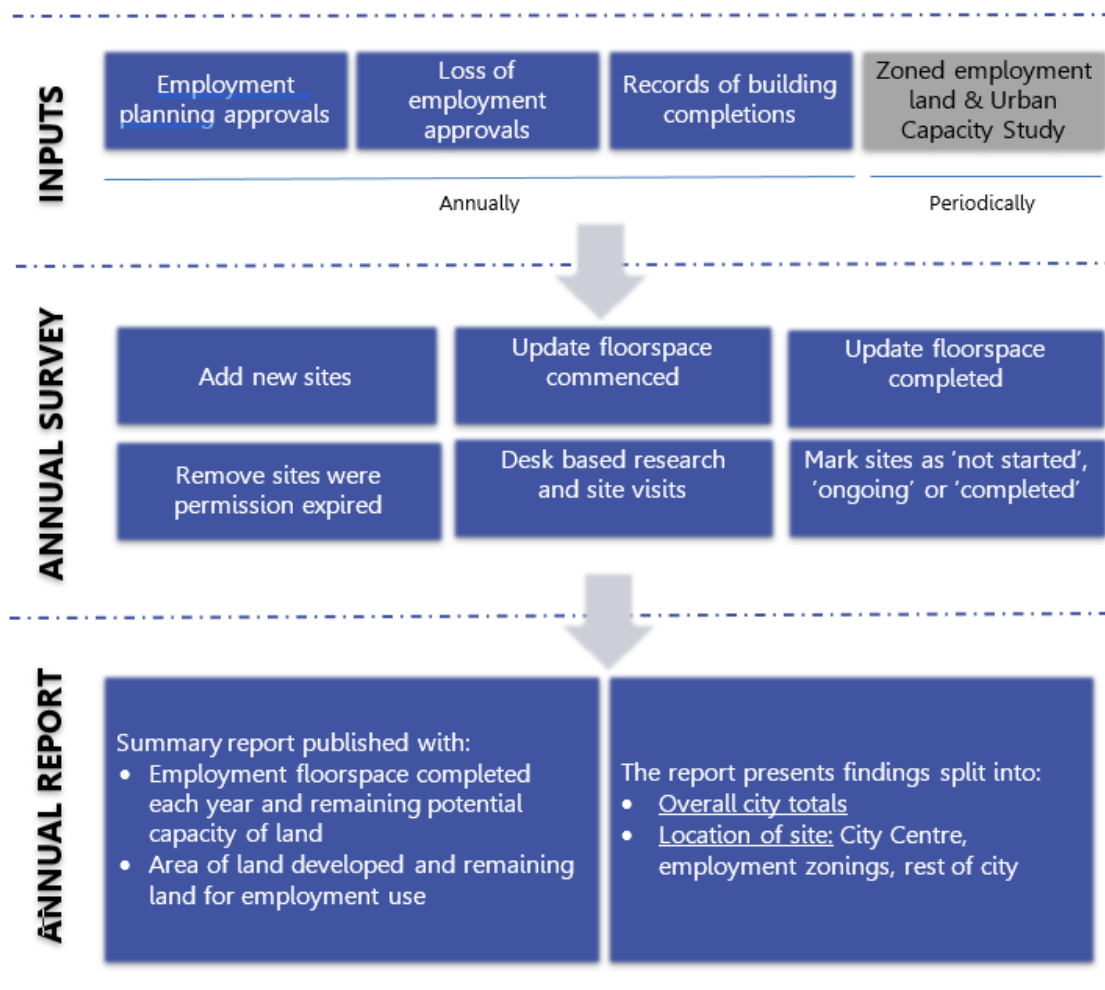
Table 6: Mixed use sites remaining yield/capacity

ZONING REFERENCE	LOCATION	EMPLOYMENT YIELD
BHA 05	NORTH FORESHORE	38,140
BT 003	LAND AT CRUMLIN ROAD INCLUDING GIRDWOOD BARRACKS	20,000
BT 002	LAND AT MONAGH BYPASS / UPPER SPRINGFIELD ROAD	4,030
BHA 01	TITANIC QUARTER	62,989
	TOTAL	125,159

Appendix A: Summary Methodology

The employment land monitor measures net gains and losses in employment floorspace within the Belfast City Council area. It provides a snapshot of the amount of land available for employment as of 1st April each year. The Monitor demonstrates the presence of an adequate and continuous supply of employment land in the city and provides evidence to inform the preparation of the Local Development Plan and to make planning decisions. The Monitor presents a register of potential employment land, based on current planning policy designations and planning permissions, rather than an accurate picture of viable employment land.

An Urban Capacity Study will be undertaken from time to time to assess the suitability, availability and achievability of monitored sites to ensure the land required to facilitate the required jobs growth over the plan period is met. An Urban Capacity Study for Belfast was published in March 2018. (https://www.belfastcity.gov.uk/getmedia/3794156e-b2b5-4437-ab36-2f13f2f4f742/DPS028_Evi-05.pdf)



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