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# Pembrokeshire County Council Employment Land Survey 2009

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## **Pembrokeshire County Council Employment Land Survey**

### **Summary of the outcomes from the 2009 survey and comparison of the 2009 data with the outcomes from previous surveys (2000, 2003, 2005 and 2007)**

#### **1 Introduction**

- 1.1 Pembrokeshire County Council has undertaken a number of employment land surveys over the last 10 years, the earliest of which was in 2000 and the latest in 2009. Since 2003 the surveys have been conducted on a biennial basis and the tables that follow present information from the 2003 survey and all subsequent surveys. The current Development Plan, the Joint Unitary Development Plan for Pembrokeshire, was adopted in 2006 and therefore the 2007 survey was the first to recognise the full portfolio of employment sites allocated by that plan.
- 1.2 The survey work records sites that are allocated for employment purposes by the adopted Development Plan, together with sites that have attracted a planning consent since survey work commenced. Employment developments are taken as being those in Use Classes B1, B2 and B8, together with Use Class A2 offices.
- 1.3 The survey has two elements to it:
  - a) A consideration of land on 'new' sites – identifying what areas of land have been developed since the last survey and the residual of land that remains undeveloped; and
  - b) A consideration of land on 'existing' sites – sites that have already been developed, but within which some land may have become disused and is therefore available for future employment use.
- 1.4 The survey does not present a comprehensive list of all available employment land in the Council's area of planning responsibility (the County of Pembrokeshire excepting the areas that are designated as National Park). However, it has and will continue to be populated with new information with each new survey and currently provides information on the majority of employment sites in the Council's planning area.
- 1.5 The information gleaned from the survey work is useful to the County Council as a baseline to inform aspects of Local Development Plan preparation. It can also be a material consideration in the consideration of planning applications, contributing to the decision making process where appropriate. Furthermore, it can be helpful to prospective developers as it identifies sites that have attracted planning permission and / or are allocated for employment purposes.

1.6 This report summarises the findings regarding employment land availability across the Council's planning area and also presents settlement-specific information on the towns defined as 'main settlements' by the Joint Unitary Development Plan for Pembrokeshire (the adopted Development Plan – often known as the JUDP) – these being Haverfordwest, Milford Haven, Neyland, Fishguard and Goodwick, Pembroke and Pembroke Dock. A further section presents the situation in the smaller settlements and on sites in the countryside.

## 2 Overview of what has happened between 2007 and 2009

2.1 At the start of this two year period (July 2007), the economy was buoyant, but since then it has moved into recession with a consequent downturn in activity. More recently there has been an upturn in activity, but there is much uncertainty over whether or not this will be sustained in the longer-term. The period of growth at the start of this period was particularly important in Pembrokeshire, as it coincided with construction work on a number of major projects, including two LNG terminals and the Bluestone visitor centre. Construction phase work continues on further major projects, notably the new Pembroke Power Station, but other areas of the economy have exhibited the effects of the downturn.

2.2 One of the features of the economy in Pembrokeshire is that, with the exception of major energy and port related 'national interest' schemes and a few other big projects and enterprises (such as Bluestone), much of the business activity is smaller scale and involves small and medium sized enterprises. This manifests itself in the survey results in the form of a few large sites (generally related to the Milford Haven Waterway or to Haverfordwest) and elsewhere a greater number of much smaller scale sites (some of which are micro-sites for home-based working) supporting a more modest scale of business activity and aspiration, but one that nonetheless makes a crucial contribution to the economy of the County.

2.3 The information from these surveys provides the County Council with baseline evidence

- to inform preparation of its Local Development Plan.
- to provide context alongside the adopted Development Plan (the JUDP), for evaluating individual planning proposals that are submitted as planning applications.

### 3 Tabular representation of the survey results

- 3.1 The purpose of Tables 1 and 2 is to provide comparative data based on the employment land availability survey results from 2003, 2005, 2007 and 2009. Two types of change can be identified from the tables – those to the total site areas at specific locations and those to the amount of undeveloped land (sometimes including buildings) – in other words the availability of employment land for future development). In a few cases the expiry of planning permissions on unallocated and partially allocated sites has resulted in significant reductions in available land. Site areas are checked on a survey-by-survey basis and often vary between successive surveys.
- 3.2 Following Tables 1 and 2 there are two further tables, providing summarised information on employment land availability and changes to the hectarage of undeveloped land and buildings.

**Table 1****Summary of site areas and undeveloped land / buildings from the 2003, 2005, 2007 and 2009 Employment Land Availability Studies – for sites allocated by the JUDP****Pembroke and Pembroke Dock (including the former Pembroke Power Station site)**

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Former Pembroke Power Station 095/00001	195.10	195.10 (0.00 developed)	195.10	195.10 (0.00 developed)	195.10	195.10 (0.00 developed)	195.10	0.00 (whole site u/c)	No change	No change	-195.10
Pembroke-shire Science and Technology Park, Pembroke Dock 096/00001	22.42	22.42 (0.00 developed)	22.42	18.23 (4.19 developed)	22.42	18.23 (4.19 developed)	22.38	18.19 (4.19 developed)	-4.19	No change	-0.04
Royal Dockyard, Pembroke Dock 096/00002	21.27	2.85 (18.42 developed)	21.27	2.85 (18.42 developed)	21.27	1.81 (19.46 developed)	21.27	1.81 (19.46 developed)	No change	-1.04	No change
West Llanion, Pembroke Dock 096/00003	7.05	0.32 (6.73 developed)	7.05	0.32 (6.73 developed)	7.37	1.26 (6.11 developed)	7.37	1.26 (6.11 developed)	No change	+0.94	No change
Ferry Lane, Pembroke Dock 096/00004	3.59	0.20 (3.39 developed)	3.59	0.20 (3.39 developed)	3.59	0.28 (3.31 developed)	3.59	0.28 (3.31 developed)	No change	+0.08	No change
Kingswood, Pembroke Dock 096/00005	6.81	1.03 (5.78 developed)	7.04	1.26 (5.78 developed)	8.29	1.69 (6.6 developed)	8.39	1.79 (6.6 developed)	+0.23	+0.66	+0.10
Waterloo Industrial Estate and London Road Business Park, Pembroke Dock 096/00006	19.65	1.88 (17.77 developed)	19.65	1.88 (17.77 developed)	19.65	2.21 (17.44 developed)	19.67	2.23 (17.44 developed)	No change	+0.33	+0.02

*Summary of findings – JUDP sites in Pembroke and Pembroke Dock (including the former Pembroke Power Station site)*

There is one large site within this group of sites – at the former Pembroke Power Station, which is slightly less than 200 hectares. The remaining sites are in a range of sizes from just under 23 hectares to just over 3.5 hectares. The key change between 2007 and 2009 has been at the former Pembroke Power Station site, where a new power station is currently under construction. Aside from this, there has been little change in relation to available land on the JUDP allocation sites, with 25.56 hectares of land available in 2009. If the former Pembroke Power Station site is excluded from the analysis, land availability on these sites was 28.70 ha (2003), 24.74 ha (2005) and 25.48 (2007).

## Haverfordwest, including Merlins Bridge and Withybush

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Withybush Business Park 040/00001	14.49	14.49 (0.00 developed)	14.02	14.02 (0.00 developed)	14.21	14.21 (0.00 developed)	14.03	14.03 (0.00 developed)	-0.47	+ 0.19	-0.18
Old Hakin Road Industrial Estate – extension 040/00002	1.29	1.29 (0.00 developed)	1.29	1.29 (0.00 developed)	1.29	1.29 (0.00 developed)	1.31	1.31 (0.00 developed)	No change	No change	+0.02
Merlins Bridge Creamery – extension 040/00003	1.40	1.40 (0.00 developed)	1.40	1.40 (0.00 developed)	1.40	1.40 (0.00 developed)	1.40	1.40 (0.00 developed)	No change	No change	No change
Withybush – east of the business park 040/00004	12.28	9.74 (2.54 developed)	12.28	9.74 (2.54 developed)	12.49	8.19 (4.3 developed)	12.49	7.20 (5.29 developed)	No change	- 1.55	-0.99
Withybush – north of the business park 040/00005	6.09	5.76 (0.33 developed)	6.09	5.76 (0.33 developed)	6.09	5.76 (0.33 developed)	6.09	5.76 (0.33 developed)	No change	No change	No change
Withybush – business park extension 040/00006	1.53	1.53 (0.00 developed)	1.53	1.53 (0.00 developed)	1.53	1.53 (0.00 developed)	1.60	1.60 (0.00 developed)	No change	No change	+0.07
Old Hakin Road Industrial Estate, Merlins Bridge 040/00007	3.89	0.00 (3.89 developed)	3.89	0.00 (3.89 developed)	3.89	0.07 (3.82 developed)	4.03	0.68 (0.68 developed)	No change	+0.07	+0.61
Withybush Industrial Estate, site A 040/00008	1.30	0.66 (0.64 developed)	1.30	0.66 (0.64 developed)	1.30	0.50 (0.80 developed)	1.32	0.00 (1.32 developed)	No change	-0.16	-0.50

**Haverfordwest, including Merlins Bridge and Withybush – continued**

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Withybush Industrial Estate, site B 040/00009	1.50	0.63 (1.9 developed)	1.50	0.63 (0.87 developed)	1.50	0.50 (1.00 developed)	1.51	0.51 (1.00 developed)	No change	-0.13	+0.01
Withybush Industrial Estate, site C 040/00010	0.92	0.00 (0.92 developed)	0.92	0.00 (0.92 developed)	0.92	0.00 (0.92 developed)	0.97	0.00 (0.97 developed)	No change	No change	No change
Withybush Industrial Estate, site D 040/00011	4.85	1.12 (3.73 developed)	4.85	1.12 (3.73 developed)	4.85	0.30 (4.55 developed)	4.87	0.00 (4.87 developed)	No change	-0.82	-0.30
Withybush Industrial Estate, site E 040/00012	4.14	0.00 (4.14 developed)	4.14	0.00 (4.14 developed)	4.14	0.00 (4.14 developed)	4.19	0.00 (4.19 developed)	No change	No change	No change
Haverford-west Station Yard 040/00013	1.46	0.00 (1.46 developed)	1.46	0.00 (1.46 developed)	1.46	0.59 (0.87 developed)	1.46	0.59 (0.87 developed)	No change	+0.59	No change

*Summary of findings – JUDP sites at Haverfordwest including Merlins Bridge and Withybush*

This group of sites, most of which are at Withybush, range in size from just over 14 hectares to just under 1 hectare. Generally, there has been little change in availability of land between 2007 and 2009 with the biggest change being at the site east of Withybush Business Park where slightly less than 1 hectare of land has been developed. In 2009 a total of 33.08 hectares of land remained available on these sites. This compares with 36.62 ha (2003), 36.15 ha (2005) and 34.34 ha (2007).

**Fishguard, Goodwick, Scleddau and Trecwn**

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Maes-gwynne, Fishguard 034/00001	5.77	5.77 (0.00 developed)	5.77	5.77 (0.00 developed)	5.77	5.77 (0.00 developed)	5.79	5.79 (0.00 developed)	No change	No change	+0.02
Feidr Castell Industrial Estate, Fishguard – extension 034/00002	0.55	0.55 (0.00 developed)	0.55	0.55 (0.00 developed)	0.55	0.27 (0.28 developed)	0.56	0.27 (0.29 developed)	No change	-0.28	No change
Goodwick Industrial Estate 034/00003	5.08	0.97 (4.11 developed)	5.08	0.97 (4.11 developed)	5.08	0.19 (4.89 developed)	5.29	0.00 (5.29 developed)	No change	-0.78	-0.19
Feidr Castell Industrial Estate, Fishguard 034/00004	1.88	0.05 (1.83 developed)	1.99	0.16 (1.83 developed)	2.01	0.16 (1.85 developed)	2.01	0.16 (1.85 developed)	+0.11	No change	No change
Goodwick Station Yard 034/00005	0.92	0.92 (0.00 developed)	0.92	0.92 (0.00 developed)	0.92	0.92 (0.00 developed)	1.25	1.25 (0.00 developed)	No change	No change	+0.33
Celtic Link Business Park, near Scleddau 034/00006	13.31	12.00 (1.31 developed)	13.31	12.00 (1.31 developed)	13.47	8.97 (4.5 developed)	13.47	5.83 (7.64 developed)	No change	-3.03	-3.14
Former RNAD, Trecwn 136/00001	21.11	21.11 (0.00 developed)	210.00	210.00 (0.00 developed)	210.00	210.00 (0.00 developed)	21.11 (because pp has expired, leaving only the JUDP allocation)	21.11 (0.00 developed)	+188.89	No change	-188.89

*Summary of findings – JUDP sites at Fishguard, Goodwick, Sceddau and Trecwn*

This group of sites ranges in size from just over 21 hectares (at Trecwn) to just over half a hectare. Significant changes for this area between 2007 and 2009 include:

- Reduction in land availability at Trecwn as a result of the expiry of a planning consent for major development;
- Celtic Link Business Park, with the change achieved through incremental development.

At 2009 a total of 34.41 hectares of land remained available on these sites. This compares with 41.37 ha (2003), 230.37 ha (2005) and 226.28 ha (2007), with the 2005 and 2007 figures being significantly different from the others because of the consenting situation applying at those dates.

**Milford Haven and Waterston (including South Hook LNG terminal)**

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
South Hook LNG Terminal (former Esso Refinery) 000/00007 *	209.30	209.30 (0.00 developed)	209.30	209.30 (0.00 developed)	209.30	0.00 (209.30 developed)	201.00	0.00 (201.00 developed)	No change	-209.30	No change
Liddeston Ridge, Milford Haven 086/00001	3.03	3.03 (0.00 developed)	3.03	3.03 (0.00 developed)	3.03	3.03 (0.00 developed)	3.08	3.08 (0.00 developed)	No change	No change	+0.05
Dale Road, Hubberston, Milford Haven 086/00002	4.64	4.64 (0.00 developed)	No change	No change	No change						
Thornton Industrial Estate 086/00003	22.07	7.91 (14.16 developed)	22.07	7.91 (14.16 developed)	22.07	7.46 (14.61 developed)	22.07	5.46 (16.61 developed)	No change	-0.45	-2.00
Former RNAD, Milford Haven 086/00004	5.96	5.96 (0.00 developed)	No change	No change	No change						
Milford Docks, Milford Haven 086/00005	7.47	0.25 (7.22 developed)	7.47	0.25 (7.22 developed)	7.47	0.00 (7.47 developed)	7.47	0.00 (7.47 developed)	No change	-0.25	No change
Haven Head Business Park, Milford Haven 086/00006	1.54	0.00 (1.54 developed)	No change	No change	No change						
Waterston Industrial Estate 146/00001	9.48	2.66 (6.82 developed)	9.48	2.66 (6.82 developed)	9.48	2.55 (6.93 developed)	9.48	2.55 (6.93 developed)	No change	-0.11	No change

\* Part of this site is within the Pembrokeshire Coast National Park (the residual outside the NP boundary is estimated at 59.70 hectares)

*Summary of findings – JUDP sites at Milford Haven and Waterston, including the South Hook LNG terminal*

This group of sites ranges in size from the South Hook LNG terminal site at just under 210 hectares (part of which is in the National Park) to just over 1.5 hectares. Aside from the South Hook site, the largest site is just over 22 hectares, at Thornton Industrial Estate. The biggest change in availability was between 2005 and 2007, reflecting construction of the LNG terminal at South Hook. Significant change for this area between 2007 and 2009 include:

- the Thornton Industrial Estate, incremental development.

In 2009 a total of 21.69 hectares of land remained available on these sites. This compares with 233.75 ha (2003), 233.75 ha (2005) and 23.64 ha (2007). The big change between 2003 and 2005 in comparison with 2007 and 2009 is largely attributable to development of the LNG terminal at South Hook.

## Neyland and Honeyborough

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
North of Honeyborough Industrial Estate 093/00001	3.18	3.18 (0.00 developed)	8.55	8.55 (0.00 developed)	8.55	8.55 (0.00 developed)	8.55	8.55 (0.00 developed)	+5.37	No change	No change
Brunel Quay and Neyland Marina 093/00002	3.06	0.00 (3.06 developed)	3.06	0.00 (3.06 developed)	3.06	0.00 (3.06 developed)	3.06	0.07 (2.99 developed)	No Change	No change	+0.07
Honeyborough Industrial Estate, Neyland 093/00003	10.93	1.34 (9.59 developed)	10.93	1.34 (9.59 developed)	10.93	1.67 (9.26 developed)	10.95	1.69 (9.26 developed)	No Change	+0.33	+0.02

### Summary of findings – JUDP sites at Neyland and Honeyborough

This small group of sites comprises two sites at Honeyborough and a smaller site at Brunel Quay. There has been minimal change in availability between 2007 and 2009.

In 2009 a total of 10.31 hectares of land remained available on these sites. This compares with 4.52 ha (2003), 9.89 ha (2005) and 10.22 ha (2007).

## Narberth

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
East of Narberth 088/00001	11.56	11.56 (0.00 developed)	9.56	9.56 (0.00 developed)	9.56	9.56 (0.00 developed)	9.40	9.40 (0.00 developed)	-2.00	No change	-0.16

### Summary of findings – JUDP sites at Narberth

There is a single site at Narberth, the size of which has slightly diminished since 2003, most notably between 2003 and 2005 when a portion was re-designated for community use (a new primary school, which is now built). In 2009 9.40 hectares remained available for development.

## Other locations

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Carew Airfield 015/00001	8.27	8.27 (0.00 developed)	8.27	2.75 (5.52 developed)	8.27	4.05 (4.22 developed)	8.94	4.32 (4.62 developed)	-5.52	+1.30 ha	+0.27
Adjacent to Riverlea / opposite Llygad-yr-Haul, Crymych 030/00001	1.86	1.86 (0.00 developed)	7.91	7.91 (0.00 developed)	5.09	5.09 (0.00 developed)	5.20	5.20 (0.00 developed)	+6.05	-2.82 ha	+0.11
Arnold's Yard, Johnston 048/00001	5.45	5.45 (0.00 developed)	5.45	5.45 (0.00 developed)	5.45	5.45 (0.00 developed)	5.47	5.47 (0.00 developed)	No change	No change	+0.02
Brickhurst Park Industrial Estate, Johnston 048/00002	2.55	0.00 (2.55 developed)	2.55	0.00 (2.55 developed)	2.55	0.00 (2.55 developed)	2.55	0.00 (2.55 developed)	No change	No change	No change
Station Industrial Estate, Johnston 048/00003	1.92	0.87 (1.05 developed)	1.98	0.93 (1.05 developed)	1.98	0.38 (1.6 developed)	2.03	0.61 (1.42 developed)	+0.06	-0.55	+0.23
Brawdy Business Park 101/00001	3.07	0.00 (3.07 developed)	3.07	0.00 (3.07 developed)	3.07	0.00 (3.07 developed)	3.09	0.00 (3.09 developed)	No change	No change	No change

### Summary of findings – other JUDP sites

Elsewhere a further 6 sites are allocated by the JUDP for employment, at Carew in the south of the County, Johnston in central Pembrokeshire and at Brawdy and Crymych in the north of the County. The largest site is at Carew, this being just under 9 hectares, with the smallest being at Johnston at just over 2 hectares. The Crymych site is complex, as part is a JUDP allocation (also consented) but a larger area is consented but doesn't have a JUDP allocation.

In 2009 a total of 15.60 hectares of land remained available on these sites. This compares with 16.45 ha (2003), 17.04 ha (2005) and 14.97 ha (2007).

**Table 2**

**Summary of site areas and undeveloped land / buildings from the 2003, 2005, 2007 and 2009 Employment Land Availability Studies – for sites not allocated by the JUDP**

**Pembroke and Pembroke Dock (including the Chevron Oil Refinery)**

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Chevron (formerly Texaco) Oil Refinery, Rhoscrowther 000/00002	195.10	0.00 (195.10 developed)	195.10	0.00 (195.10 developed)	195.10	0.00 (195.10 developed)	215.30	0.00 (215.30 developed)	No change	No change	No change
Forever Art Tattoos, 6, Northgate Street, Pembroke 095/00004	---	---	---	---	---	---	0.01	0.01	---	---	+0.01
38, Main Street, Pembroke 095/00005	---	---	---	---	---	---	0.01	0.00 (0.01 under construction)	---	---	No change
Windmill Hill Farm, Pembroke 095/00006	---	---	---	---	---	---	0.21	0.00 (0.21 developed)	---	---	No change
Cleddau Bridge Customer Centres, Pembroke Dock 096/00007	3.10	3.10 (0.00 developed)	3.10	0.00 (3.10 developed)	3.10	0.00 (3.10 developed)	3.10	0.00 (3.10 developed)	-3.10	No change	No change
Bramble Hall Farm, Ferry Lane, Pembroke Dock 096/00009	---	---	---	---	0.06	0.02 (0.04 developed)	0.06	0.02 (0.04 developed)	---	---	No change

**Pembroke and Pembroke Dock (including Chevron Oil Refinery) - continued**

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Garage at Fern Villa, Owen Street, Pennar, Pembroke Dock 096/00010	---	---	---	---	0.09	0.00 (0.09 developed)	0.10	0.00 (0.10 developed)	---	---	No change
CCW offices, Llanion Park, Pembroke Dock 096/00011	---	---	---	---	0.18	0.00 (0.18 developed)	0.18	0.00 (0.18 developed)	---	---	No change
Flat 3, Paterchurch Court, Front Street, Pembroke Dock 096/00012	---	---	---	---	---	---	0.03	0.03	---	---	+0.03
Alexandra Vaults, 39, Dimond Street, Pembroke Dock 096/00013	---	---	---	---	---	---	0.03	0.00 (0.03 developed)	---	---	No change
Royal Dockyard Building 53, Pembroke Dock 096/00014	---	---	---	---	---	---	0.01	0.00 (0.01 developed)	---	---	No change

*Summary of findings – non-JUDP sites at Pembroke and Pembroke Dock (including the Chevron Refinery)*

This group of sites includes the Chevron Oil Refinery, whose site area is currently estimated at about 215 hectares and is fully in use. The other ten sites are on a much smaller scale, including eight micro-sites of less than 0.2 hectares. The Chevron site has been fully in use throughout the monitored period.

In 2009, only 0.06 hectares of land remained available on these sites. This compares with 3.10 hectares (2003), 0.00 ha (2005) and 0.02 ha (2007).

## Haverfordwest, including Merlins Bridge and Withybush

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Cuckoo Grove Farm, Haven Road, Haverfordwest 000/00005	0.04	0.00 (0.04 developed)	No change	No change	No change						
Merlins Bridge Creamery, Haverfordwest 040/00014	2.50	0.00 (2.50 developed)	No change	No change	No change						
Withybush Industrial Estate, site F 040/00015	1.27	0.41 (0.86 developed)	1.27	0.41 (0.86 developed)	1.27	0.58 (0.69 developed)	1.29	0.60 (0.69 developed)	No change	+0.17	+0.02
Ridgeway, Withybush, Haverfordwest 040/00016	---	---	0.98	0.98 (0.00 developed)	0.98	0.98 (0.00 developed)	0.98	0.98 (0.00 developed)	---	No change	No change
Tangiers Farm, Fishguard Road, Withybush, Haverfordwest 040/00017	---	---	0.16	0.16 (0.00 developed)	0.16	0.00 (0.16 developed)	0.16	0.00 (0.16 developed)	---	-0.16	No change
Keith T Davies, 38 Jury Lane, Haverfordwest 040/00018	---	---	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	No change	No change
Toyota Showroom, Narberth Road, Haverfordwest 040/00019	---	---	1.02	0.42 (0.60 developed)	1.02	0.42 (0.60 developed)	1.03	0.42 (0.61 developed)	---	No change	No change
A40 Garage, Slebech 040/00020	---	---	0.34	0.00 (0.34 developed)	0.34	0.00 (0.34 developed)	0.35	0.00 (0.35 developed)	---	No change	No change

Haverfordwest, including Merlins Bridge and Withybush – continued

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Merlins Autos, Magdalen Street, Merlins Bridge 040/00021	---	---	0.09	0.09 (0.00 developed)	0.09	0.00 (0.09 developed)	0.09	0.00 (0.09 developed)	---	-0.09	No change
Builders' Yard, Lower Dredgmans Hill, Merlins Bridge 040/00022	---	---	0.58	0.00 (0.58 developed)	0.58	0.00 (0.58 developed)	0.58	0.00 (0.58 developed)	---	No change	No change
Avallanau House, Merlins Bridge 040/00023	---	---	---	---	0.56	0.21 (0.35 developed)	0.63	0.28 (0.35 developed)	---	---	+0.07
Haverfordwest Tel / MTW, Hawthorn Rise, Haverfordwest 040/00024	---	---	---	---	1.20	0.00 (1.20 developed)	1.25	0.00 (1.25 developed)	---	---	No change
Rear of frontage garages, 2A, Hill Street, Haverfordwest 040/00025	---	---	---	---	0.04	0.00 (0.04 developed)	0.04	0.00 (0.04 developed)	---	---	No change
CEM Day, Fishguard Road, Withybush 040/00026	---	---	---	---	---	---	1.45	0.00 (1.45 developed)	---	---	No change
Haverfordwest Airport 040/00027	---	---	---	---	---	---	1.54	0.00 (1.54 developed)	---	---	No change

**Haverfordwest, including Merlins Bridge and Withybush – continued**

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Outbuilding, r/o Gloster Arms and Greyhound, 13, Mariners Square, Haverfordwest 040/00028	---	---	---	---	---	---	0.02	0.02	---	---	+0.02
23, Bridge Street, Haverfordwest 040/00029	---	---	---	---	---	---	0.01	0.00 (0.01 developed)	---	---	No change
Shire Hall, High Street, Haverfordwest 040/00030	---	---	---	---	---	---	0.09	0.00 (0.09 developed)	---	---	No change
14, Picton Place, Haverfordwest 040/00031	---	---	---	---	---	---	0.02	0.00 (0.02 developed)	---	---	No change
Show Office, County Show Ground, Withybush 040/00032	---	---	---	---	---	---	0.22	0.22	---	---	+0.22

*Summary of findings – non-JUDP sites at Haverfordwest, including Merlins Bridge and Withybush*

The twenty sites in this group are all of a small scale, with the largest being 2.5 hectares and nine being less than 0.2 hectares.

In 2009, 2.52 hectares of land remained available on these sites. This compares with 0.41 hectares (2003), 2.06 ha (2005) and 2.19 ha (2007).

## Fishguard and Goodwick

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Former Dewhirst Factory and adjacent business units, Goodwick 034/00007	1.87	1.04 (0.83 developed)	1.87	1.04 (0.83 developed)	1.87	0.94 (0.93 developed)	1.82	0.94 (0.88 developed)	No change	-0.10	No change
Ivybridge, Dyffryn, Goodwick 034/00008	---	---	0.01	0.01 (0.00 developed)	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	-0.01	No change
74, High Street, Fishguard 034/00010	---	---	---	---	0.08	0.04 (0.04 developed)	0.08	0.04 (0.04 developed)	---	---	No change
Part of 1, High Street, Fishguard 034/00011	---	---	---	---	---	---	0.01	0.01	---	---	+0.01
11, High Street, Fishguard 034/00012	---	---	---	---	---	---	0.02	0.02	---	---	+0.02
17 to 19, West Street, Fishguard 034/00013	---	---	---	---	---	---	0.06	0.06	---	---	+0.06
Redundant Reservoir, Stop and Call, Goodwick 034/00014	---	---	---	---	---	---	0.11	0.11	---	---	+0.11

### Summary of findings – non-JUDP sites at Fishguard and Goodwick

The seven sites in this group are all of small size, the largest being of just over 1.8 hectares and the remaining six of less than 0.2 hectares.

In 2009 1.18 hectares of land remained available on these sites, mostly on the former Dewhirst Factory site. This compares with 1.04 hectares (2003), 1.05 hectares (2005) and 0.98 hectares (2007).

**Milford Haven and Waterston (including Milford Haven Refinery and Petro Plus / Dragon LNG)**

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Milford Haven Refinery 000/00003	123.70	0.00 (123.70 developed)	123.70	0.00 (123.70 developed)	123.70	0.00 (123.70 developed)	123.70	0.00 (123.70 developed)	No Change	No change	No change
Petro Plus / Dragon LNG, Milford Haven 000/00004	150.80	0.00 (150.80 developed)	195.10	0.00 (195.10 developed)	177.20	0.00 (177.20 developed)	177.20	0.00 (177.20 developed)	+44.30	-17.90	No change
30, Hamilton Terrace, Milford Haven 086/00007	---	---	0.07	0.07 (0.00 developed)	0.07	0.00 (0.07 developed)	0.08	0.00 (0.08 developed)	---	-0.07	No change
SE of Steynton, near Castle Pill Farm, Milford Haven 086/00008	---	---	0.02	0.00 (0.02 developed)	0.02	0.00 (0.02 developed)	0.02	0.00 (0.02 developed)	---	No change	No change
Enterprise Rent-a-Car, Garage adjacent to 61, Great North Road, Milford Haven 086/00010	---	---	---	---	0.08	0.00 (0.08 developed)	0.08	0.00 (0.08 developed)	---	---	No change
BDS Depot, Dale Road, Hakin, Milford Haven 086/00012	---	---	---	---	0.40	0.00 (0.40 developed)	0.45	0.00 (0.45 developed)	---	---	No change

**Milford Haven and Waterston (including Milford Haven Refinery and Petro Plus / Dragon LNG) – continued**

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Adjacent to Talbot Timber Calor Gas Compound, Hubberston, Milford Haven 086/00013	---	---	---	---	---	---	0.11	0.11	---	---	+0.11
Waterston to West Pennar Pipeline 146/000021	---	---	---	---	---	---	41.98	0.00 (41.98 developed)	---	---	No change

*Summary of findings – non-JUDP sites at Milford Haven (including Milford Haven Refinery and Petro Plus / Dragon LNG)*

The eight sites in this group include the Milford Haven Refinery (123.7 hectares), the Petro-Plus / Dragon LNG site (177.2 hectares), a pipeline development site (41.98 hectares, with elements on the north and south shore of the Milford Haven Waterway) and five smaller sites, each of less than 0.5 hectares.

In 2009 only 0.11 hectares of land remained available on these sites. In 2003 and 2007 no land was available, while the 2005 survey recorded 0.07 hectares as available.

<sup>1</sup> This site has a north and south shore element. One element is found in the the Milford Haven and Waterston area, the other close to Pwllcrochan and largely overlapping with the Pembroke Power Station site. The 41.98 hectare site area is split between the two elements.

## Neyland and Honeyborough

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Dale Sailing Co Ltd, Brunel Quay, Neyland 093/00005	---	---	---	---	0.01	0.01 (0.00 developed)	0.01	0.01 (0.00 developed)	---	---	No change
Sinclair Garages (Neyland) Ltd, Haven Bridge Road, Honeyborough, Neyland 093/00006	---	---	---	---	0.86	0.00 (0.86 developed)	0.87	0.00 (0.87 developed)	---	---	No change
Brunel Chandlery Ltd, Brunel Quay, Neyland 093/00007	---	---	---	---	0.03	0.00 (0.03 developed)	0.03	0.00 (0.03 developed)	---	---	No change
109, High Street, Neyland 093/00008	---	---	---	---	---	---	0.03	0.03	---	---	+0.03

### Summary of findings – non-JUDP sites at Neyland and Honeyborough

The four sites in this group are all of small size, the largest being 0.87 hectares and the other three less than 0.2 hectares. In 2009 only 0.04 hectares of land remained available on these sites. In 2003 and 2005 no land was available at these sites, while in 2007, 0.01 hectares was available.

## Narberth

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Rear of Maes-yr-Awel, Redstone Road / Rushacre Lane, Narberth 088/00002	2.36	0.00 (2.36 developed)	2.36	0.00 (2.36 developed)	2.36	0.78 (1.58 developed)	2.43	0.16 (2.27 developed)	No change	No change	-0.62
Narberth Bridge Business Park 088/00003	0.70	0.03 (0.67 developed)	0.70	0.03 (0.67 developed)	0.70	0.00 (0.70 developed)	0.68	0.00 (0.68 developed)	No change	-0.03	No change
East of Redstone Road, Narberth 088/00004	---	---	0.23	0.23 (0.00 developed)	0.23	0.00 (0.23 developed)	0.37	0.00 (0.37 developed)	---	-0.23	No change
Ferndale Garage, Cold Blow Road, Narberth 088/00005	---	---	0.01	0.01 (0.00 developed)	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	-0.01	No change
17, High Street, Narberth 088/00006	---	---	---	---	---	---	0.01	0.01	---	---	+0.01
1st and 2nd Floors, 15a and 15b, High Street, Narberth 088/00007	---	---	---	---	---	---	0.01	0.01	---	---	+0.01
15, Market Square, Narberth 088/00008	---	---	---	---	---	---	0.01	0.01	---	---	+0.01

**Narberth - continued**

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Former CCF Ltd Premises, Spring Gardens, Narberth 088/00009	---	---	---	---	---	---	0.07	0.00 (0.07 developed)	---	---	No change
The Old Station Yard, Station Approach, Narberth 088/00010	---	---	---	---	---	---	0.01	0.00 (0.01 developed)	---	---	No change
The Dingle, Jesse Road, Narberth 088/00011	---	---	---	---	---	---	0.01	0.00 (0.01 developed)	---	---	No change

*Summary of findings – non-JUDP sites at Neyland and Honeyborough*

There are ten sites in this group, with the largest being just under 2.5 hectares.

In 2009 only 0.19 hectares of land in total remained available at these sites. This compares with 0.03 hectares (2003), 0.27 hectares (2005) and 0.78 hectares (2007).

## Other locations

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
South of the former airfield, Templeton 000/00001	3.63	0.00 (3.63 developed)	3.63	0.00 (3.63 developed)	3.63	0.55 (3.08 developed)	1.37	0.00 (1.37 developed)	No change	+0.55	-0.55
Nick Davies – Yamaha Farm Bikes, Llysawel, Eglwysrwr 000/00006	0.21	0.00 (0.21 developed)	0.21	0.00 (0.21 developed)	0.21	0.00 (0.21 developed)	0.03	0.00 (0.03 developed)	No change	No change	No change
Disused quarry, Vaynor Farm, Bethesda 005/00001	---	---	0.39	0.39	0.39	0.39	0.40	0.00 (0.40 developed)	---	No change	-0.39
Sarngwm, Bethesda 005/00002	---	---	---	---	---	---	0.03	0.00 (0.03 developed)	---	---	No change
Derw Glass Ltd, Pant-y-Deri, Blaenffos 006/00001	---	---	0.21	0.06 (0.15 developed)	0.21	0.00 (0.21 developed)	0.21	0.00 (0.21 developed)	---	-0.06	No change
Dylan Thomas (Cenarth Forge), adjacent to the Old Station Yard, Boncath 007/00001	---	---	0.45	0.02 (0.43 developed)	0.45	0.00 (0.45 developed)	0.45	0.00 (0.45 developed)	---	-0.02	No change
Meigan Wells, Boncath 007/00002	---	---	---	---	0.46	0.00 (0.46 developed)	0.45	0.00 (0.45 developed)	---	---	No change
'Ty Sar', Bwlch-y-Groes 013/00001	---	---	---	---	0.05	0.00 (0.05 developed)	0.05	0.00 (0.05 developed)	---	---	No change

Other locations – continued

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Fairlawn, Slade Farm, Wolfsdale 014/00001	---	---	---	---	---	---	0.01	0.01	---	---	+0.01
Carew Airfield Pavilion, Sageston 015/00002	---	---	1.85	0.00 (1.85 developed)	1.85	0.00 (1.85 developed)	1.86	0.00 (1.86 developed)	---	No change	No change
Bartlett Engineering, Birds Lane, Sageston 015/00003	---	---	0.25	0.25	0.25	0.00 (0.25 developed)	0.25	0.00 (0.25 developed)	---	-0.25	No change
Welsh Wildlife Centre – Teifi Marshes Nest Reserve, Cilgerran 020/00001	---	---	---	---	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	---	No change
Willow Wood, Clarbeston Road 022/00001	---	---	---	---	2.16	0.00 (2.16 developed)	2.17	0.00 (2.17 developed)	---	---	No change
Melindawood , Crundale 029/00001	---	---	---	---	0.09	0.00 (0.09 developed)	0.09	0.00 (0.09 developed)	---	---	No change
Midway Motors, Crymych 030/00003	---	---	---	---	0.05	0.00 (0.05 developed)	0.05	0.00 (0.05 developed)	---	---	No change
Cowshed and cornloft at rear of Deerland Farmhouse, Deerland 031/00001	---	---	---	---	0.04	0.00 (0.04 developed)	0.04	0.00 (0.04 developed)	---	---	No change

Other locations – continued

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Central Roofing, 'The Ford', East Williamston 032/00001	---	---	0.06	0.06	0.06	0.00 (0.06 developed)	0.06	0.00 (0.06 developed)	---	-0.06	No change
Chestnut Cottage, Eglwysrwr 033/00001	---	---	---	---	0.08	0.00 (0.08 developed)	0.08	0.00 (0.08 developed)	---	---	No change
Gelli Aur, Glanrhyd 038/00001	---	---	---	---	---	---	0.57	0.00 (0.57 developed)	---	---	No change
Mountain Water, Hayscastle Cross 041/00001	---	---	---	---	---	---	0.09	0.09	---	---	+0.09
The Garage, Hermon Square, Hermon 042/00001	---	---	0.03	0.00 (0.03 developed)	0.03	0.00 (0.03 developed)	0.03	0.00 (0.03 developed)	---	No change	No change
The Forge, St. Peter's Road, Johnston 048/00004	---	---	0.20	0.00 (0.20 developed)	0.20	0.00 (0.20 developed)	0.21	0.00 (0.21 developed)	---	No change	No change
Halfway Motor Spares, Johnston 048/00005	---	---	---	---	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	---	No change
Station Garage, Carmarthen Road, Kilgetty 050/00001	---	---	0.25	0.25	0.25	0.00 (0.25 developed)	0.25	0.00 (0.25 developed)	---	-0.25	No change
Haulwen, Ryelands Lane, Kilgetty 050/00002	---	---	---	---	---	---	0.07	0.07	---	---	+0.07

Other locations – continued

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Adjacent to Avondale Glass, Kilgetty 050/00003	---	---	---	---	---	---	0.16	0.16	---	---	+0.16
East of Letterston 053/00001	1.16	1.16	1.16	1.16	1.16	1.16	1.26	1.26	No change	No change	+0.10
Former Coal Yard, East Llyn, Letterston 053/00002	---	---	0.24	0.24	0.24	0.24	0.24	0.24	---	No change	No change
Gwaun Garage, Letterston 053/00003	---	---	---	---	0.02	0.00 (0.02 developed)	0.02	0.00 (0.02 developed)	---	---	No change
Trelawley / The Bungalow, Llanddewi Velfrey 057/00001	---	---	---	---	---	---	0.07	0.00 (0.07 developed)	---	---	No change
Jays Metals, Wern Glyd, Cilirhedyn, near Llanfyrnach 061/00001	---	---	0.01	0.01	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	-0.01	No change
Henfeddau, Llanfyrnach 061/00002	---	---	---	---	---	---	0.21	0.21	---	---	+0.21
Sea Breeze, Llanteg 067/00001	0.04	0.04	0.04	0.00 (0.04 developed)	0.04	0.00 (0.04 developed)	0.04	0.00 (0.04 developed)	-0.04	No change	No change
Rose Park Farm, Amroth Road, Llanteg 067/00002	---	---	---	---	0.30	0.17 (0.13 developed)	0.30	0.00 (0.30 developed)	---	---	-0.17

Other locations – continued

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Ysgol Hill, Rosebush 081/00001	---	---	---	---	0.42	0.00 (0.42 developed)	0.04	0.00 (0.04 developed)	---	---	No change
West Furston Farm, Maidenwells 082/00001	---	---	---	---	0.03	0.00 (0.03 developed)	0.03	0.00 (0.03 developed)	---	---	No change
Old Mill, Milton 087/00001	---	---	---	---	---	---	0.01	0.00 (0.01 developed)	---	---	No change
Rumbleway Service Station, New Hedges 089/00002	---	---	0.02	0.02	0.02	0.00 (0.02 developed)	0.02	0.00 (0.02 developed)	---	-0.02	No change
Well Park Caravan Site, New Hedges 089/00003	---	---	---	---	---	---	0.60	0.00 (0.60 under construction)	---	---	No change
2, Clayford Cottages, Clayford Road, Moreton 099/00001	---	---	---	---	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	---	No change
Cawdor Barracks, Brawdy, near Penycwm 101/00002	---	---	---	---	---	---	0.06	0.00 (0.06 developed)	---	---	No change
Princes Gate Spring Water, Princes Gate 106/00001	---	---	---	---	1.72	1.03 (0.69 developed)	1.72	0.67 (1.05 developed)	---	---	-0.36
Catershill Farm, Reynalton 110/00001	---	---	0.16	0.16	0.16	0.16	0.17	0.00 (0.17 developed)	---	No change	-0.16

Other locations – continued

Site name	Total site area in 2003 (in hectares)	Undeveloped land /buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/ buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/ buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Gareth J Hughes (Motors) Ltd, 25 Sardis 117/00001	---	---	0.19	0.05 (0.14 developed)	0.19	0.05 (0.14 developed)	0.19	0.05 (0.14 developed)	---	No change	+0.01
Stepaside Coachworks 127/00001	0.28	0.00 (0.28 developed)	0.28	0.00 (0.28 developed)	0.28	0.00 (0.28 developed)	0.03	0.00 (0.03 developed)	No change	No change	No change
Merrixton House Farm, Stepaside 127/00002	0.26	0.00 (0.26 developed)	0.26	0.00 (0.26 developed)	1.21	0.00 (1.21 developed)	1.21	0.00 (1.21 developed)	No change	No change	No change
Cwmrath Farm, Stepaside 127/00003	---	---	---	---	0.01	0.00 (0.01 developed)	0.01	0.00 (0.01 developed)	---	---	No change
Adjacent to Molleston Road, south of the A.4115, Templeton 132/00001	1.57	1.57	1.57	1.57	1.57	1.57	2.88	2.88	No change	No change	+1.31
The Coalyard, Yerboston Road, Templeton 132/00002	---	---	1.04	1.04	1.04	0.39 (0.65 developed)	1.05	0.40 (0.65 developed)	---	-0.65	+0.01
Old Forge, Templeton 132/00003	---	---	0.09	0.09	0.09	0.00 (0.09 developed)	0.09	0.00 (0.09 developed)	---	No change	No change

Other locations – continued

Site name	Total site area in 2003 (in hectares)	Undeveloped land/buildings in 2003 (in hectares)	Total site area in 2005 (in hectares)	Undeveloped land/buildings in 2005 (in hectares)	Total site area in 2007 (in hectares)	Undeveloped land/buildings in 2007 (in hectares)	Total site area in 2009 (in hectares)	Undeveloped land/buildings in 2009 (in hectares)	Change to undeveloped land/ buildings between 2003 & 2005	Change to undeveloped land/ buildings between 2005 & 2007	Change to undeveloped land/ buildings between 2007 & 2009
Templeton Highway Depot, Templeton 132/00004	---	---	---	---	0.89	0.00 (0.89 developed)	0.89	0.00 (0.89 developed)	---	---	No change
Adjacent to Rowlands View, Templeton 132/00005	---	---	---	---	---	---	4.67	0.91 (3.76 developed)	---	---	+0.91
Former MOD Security Compound, Templeton Airfield 132/00006	---	---	---	---	---	---	0.43	0.00 (0.43 developed)	---	---	No change
Course Hill Cottage, Templeton 132/00007	---	---	---	---	---	---	0.06	0.00 (0.06 developed)	---	---	No change
Edwards Brothers Coach and Minibus Centre, Tiers Cross 135/00001	0.46	0.00 (0.46 developed)	0.46	0.00 (0.46 developed)	0.46	0.12 (0.34 developed)	0.46	0.12 (0.34 developed)	No change	+0.12	No change
Welsh Hook Garage, Welsh Hook 147/00001	---	---	0.26	0.26	0.26	0.00 (0.26 developed)	0.26	0.00 (0.26 developed)	---	-0.26	No change

*Summary of findings – non-JUDP sites at other locations*

There are fifty six sites in this group, demonstrating the range of locations across the County at which employment activity takes place and the abundance of small scale employment sites. None of the listed sites exceeds 5 hectares in size and the majority (31) are of 0.2 hectares or less.

In 2009 a total of 7.07 hectares of land remained available at these sites. This compares with 2.77 hectares (2003) and 5.63 hectares (2005) and 5.83 hectares (2007).

## Aggregated summary of findings

### *Employment land availability*

This table aggregates permissions and allocations and presents totals for overall employment land availability for each of the years 2003, 2005, 2007 and 2009. 121 sites have been identified in total, with the most significant changes being attributable to the developments on major sites adjoining the Milford Haven Waterway at South Hook LNG and Pembroke Power Station and the granting and subsequent expiry of planning permission at Trecwn. Other changes in land availability are modest in comparison with these.

<i>Site type and location</i>	<i>Number of sites in group</i>	<i>Land available 2003 (hectares)</i>	<i>Land available 2005 (hectares)</i>	<i>Land available 2007 (hectares)</i>	<i>Land available 2009 (hectares)</i>
JUDP allocations Pembroke and Pembroke Dock (including former Pembroke Power Station site)	7	223.80	219.84	220.58	25.56
Non-JUDP sites Pembroke and Pembroke Dock (including Chevron Refinery)	11	3.10	0.00	0.02	0.06
JUDP allocations Haverfordwest, including Merlins Bridge and Withybush	13	36.62	36.15	34.34	33.08
Non-JUDP sites Haverfordwest, including Merlins Bridge and Withybush	20	0.41	2.06	2.19	2.52
JUDP allocations Fishguard, Goodwick, Scleddau and Trecwn	7	41.37	230.37	226.28	34.41
Non-JUDP sites Fishguard and Goodwick	7	1.04	1.05	0.98	1.18
JUDP allocations Milford Haven and Waterston (including South Hook LNG)	8	233.75*	233.75*	23.64	21.69
Non-JUDP sites Milford Haven (including Milford Haven Refinery and Petro-Plus / Dragon LNG)	8	0.00	0.07	0.00	0.11
JUDP allocations Neyland and Honeyborough	3	4.52	9.89	10.22	10.31
Non-JUDP sites Neyland and Honeyborough	4	0.00	0.00	0.01	0.04
JUDP allocations Narberth	1	11.56	9.56	9.56	9.40
Non-JUDP sites Narberth	10	0.03	0.27	0.78	0.19
JUDP allocations Other Locations	6	16.45	17.04	14.97	15.60
Non-JUDP sites Other Locations	56	2.77	5.63	5.83	7.07
<b>Totals</b>	<b>161</b>	<b>575.42</b>	<b>765.68</b>	<b>549.40</b>	<b>161.22</b>

\*Includes one site that is partially within the Pembrokeshire Coast National Park (in 2009 this site had an area of 201.00 hectares, of which 59.70 hectares was outside the National Park boundary)

Aggregated summary of findings

*Employment land development*

*The table below shows the rate of developed employment land for the years 2003-2005, 2005-2007 and 2007-2009. Most areas have seen a decline in the rate of developed employment land.*

<i>Site type and location</i>	<i>Land developed 2003-2005 (hectares)</i>	<i>Land developed 2005-2007 (hectares)</i>	<i>Land developed 2007-2009 (hectares)</i>	<i>Land Available 2009</i>
JUDP allocations Pembroke and Pembroke Dock (including former Pembroke Power Station site)	4.19	1.86	0	25.56
Non-JUDP sites Pembroke and Pembroke Dock (including Chevron Refinery)	3.10	0.31	20.47	0.06
JUDP allocations Haverfordwest, including Merlins Bridge and Withybush	0	2.87	1.93	33.08
Non-JUDP sites Haverfordwest, including Merlins Bridge and Withybush	1.53	1.84	3.18	2.52
JUDP allocations Fishguard, Goodwick, Scleddau and Trecwn	0	4.27	3.55	34.41
Non-JUDP sites Fishguard and Goodwick	0	0.15	-0.05 <sup>2</sup>	1.18
JUDP allocations Milford Haven and Waterston (including South Hook LNG)	0	210.11	2.00	21.69
Non-JUDP sites Milford Haven (including Milford Haven Refinery and Petro-Plus / Dragon LNG)	44.32	0.55	42.04	0.11
JUDP allocations Neyland and Honeyborough	0	0	0	10.31
Non-JUDP sites Neyland and Honeyborough	0	0.89	0.01	0.04
JUDP allocations Narberth	0	0	0	9.40
Non-JUDP sites Narberth	0	0.27	0.94	0.19
JUDP allocations Other Locations	5.52	0.55	0.42	15.60
Non-JUDP sites Other Locations	3.12	8.18	4.18	7.07
<b>Totals</b>	<b>61.78</b>	<b>231.85</b>	<b>78.67</b>	<b>161.22</b>

<sup>2</sup> Attributable to a downward adjustment to a site area

### *Changes to the hectarage of undeveloped land and buildings*

The table below sets out the changes to undeveloped land and buildings for 2003, 2005, 2007 and 2009. It incorporates changes from the development of land over successive survey periods, together with changes to site areas and site status (for instance due to new or amended allocations and / or new renewed or expired consents). It is therefore not a pure indication of land take-up. As with the table above, the biggest influences on the overall figures are the developments on major sites adjoining the Milford Haven Waterway at South Hook LNG and Pembroke Power Station and the granting and subsequent expiry of planning permission at Trecwn.

<i>Site type and location</i>	<i>Number of sites in group</i>	<i>Changes to undeveloped land and buildings 2003 to 2005 (hectares)</i>	<i>Changes to undeveloped land and buildings 2005 to 2007 (hectares)</i>	<i>Changes to undeveloped land and buildings 2007 to 2009 (hectares)</i>
JUDP allocations Pembroke and Pembroke Dock (including former Pembroke Power Station site)	7	-3.96	+0.97	-195.02
Non-JUDP sites Pembroke and Pembroke Dock (including Chevron Refinery)	11	-3.10	No change	+0.04
JUDP allocations Haverfordwest, including Merlins Bridge and Withybush	13	-0.47	-1.81	-1.26
Non-JUDP sites Haverfordwest, including Merlins Bridge and Withybush	20	No change	-0.08	+0.33
JUDP allocations Fishguard, Goodwick, Sceddau and Trecwn	7	+189.00	-4.09	-191.87
Non-JUDP sites Fishguard and Goodwick	7	No change	-0.11	+0.20
JUDP allocations Milford Haven and Waterston (including South Hook LNG*)	8	No change	-210.11	-1.95
Non-JUDP sites Milford Haven (including Milford Haven Refinery and Petro-Plus / Dragon LNG)	8	+44.30	-17.97	+0.11
JUDP allocations Neyland and Honeyborough	3	+5.37	+0.33	+0.09
Non-JUDP sites Neyland and Honeyborough	4	No change	No change	+0.03
JUDP allocations Narberth	1	-2.00	No change	-0.16
Non-JUDP sites Narberth	10	No change	-0.27	-0.59
JUDP allocations Other Locations	6	+0.59	-2.07	+0.63
Non-JUDP sites Other Locations	56	-0.04	-0.91	+1.25
<b>Totals</b>	<b>161</b>	<b>+229.69</b>	<b>-236.12</b>	<b>-388.17</b>

\* The South Hook LNG site is partially within the Pembrokeshire Coast National Park (at 2009, this site had an area of 201.00 hectares, of which 59.70 hectares was outside the National Park boundary)