POP 004

Antrim and Newtownabbey
BOROUGH COUNCIL

# Local Development Plan 2030
# Evidence Paper
## Facilitating Economic Development

January 2017

This page is intentionally blank

# Table of Contents

Executive Summary ........................................................................6
1 Introduction........................................................................14
Council Policy Context ........................................................................16
Regional Policy Context ........................................................................16
2 Employment and Industry ........................................................................18
Regional Policy Context ........................................................................18
Existing Development Plans and Operational Planning Policy.......20
Business and Employment Base ........................................................................22
Land for Employment and Industry Development ...........................35
Belfast International Airport & Nutt's Corner .....................................40
Planning for Employment and Industry in the Future .......................42
Key Findings........................................................................42
Next Steps........................................................................44
3 Retail ........................................................................45
Regional Policy Context ........................................................................45
Existing Development Plans and Operational Planning Policy.......49
Other Relevant Strategies/Legislation ................................................50
Retail Profile of the Borough ................................................................51
Retail Trends ........................................................................60
Key Findings........................................................................65
Next Steps........................................................................66
4 Commercial Leisure ........................................................................68
Regional Policy Context ........................................................................68
Existing Development Plans and Operational Planning Policy.......70
Other Relevant Strategies/Legislation ................................................70
Existing Commercial Leisure Provision ................................................71
Future Commercial Leisure Provision ..................................................73
Key Findings........................................................................73
Next Steps........................................................................74
5 Tourism ........................................................................75
Regional Policy Context ........................................................................75

Existing Development Plans and Operational Planning Policy.......77
Other Relevant Strategies/Legislation.......80
Economic Role of Tourism in Northern Ireland.......82
Tourism in Antrim and Newtownabbey.......83
Tourist Accommodation in Antrim and Newtownabbey.......84
Tourist Attractions/Infrastructure in Antrim and Newtownabbey...89
Key Findings.......94
Next Steps.......95

6 Agriculture, Fishing and Forestry.......96
Regional Policy Context.......96
Existing Development Plans and Operational Planning Policy.......98
Other Relevant Strategies/Legislation.......99
Agriculture.......100
Fishing.......107
Forestry.......109
Key Findings.......113
Next Steps.......113

7 Minerals.......114
Regional Policy Context.......115
Existing Development Plans and Operational Planning Policy.....116
Other Relevant Strategies/Legislation.......118
Economic Role of Minerals in Northern Ireland.......119
Superficial & Bedrock Geology.......120
Active and Inactive Quarries and Mineral Sites.......121
Minerals Resource Map of Northern Ireland.......122
Minerals Licensing.......127
Review of Old Mineral Permissions (ROMPs).......128
Key Findings.......130
Next Steps.......131

8 Waste Management.......132
Strategic Policy Context.......132
Existing Development Plans and Operational Planning Policy.....134

Other Relevant Strategies/Legislation ..... 135
Waste Management in Antrim and Newtownabbey ..... 138
Key findings ..... 146
Next Steps ..... 148
9 Energy ..... 149
Regional Policy Context ..... 149
Existing Development Plans and Operational Planning Policy ..... 150
Other Relevant Strategies/Legislation ..... 152
Current Energy Position in Northern Ireland ..... 153
Energy Consumption and Generation ..... 154
Planning Approvals ..... 159
Key Findings ..... 164
Next Steps ..... 165

# Executive Summary

### Industry and Employment

- The SPPS requires that Local Development Plans must take account of the regional strategic objectives for facilitating economic development, which including:
    - The promotion of sustainable economic development in an environmentally sensitive manner;
    - Tackling disadvantage and facilitating job creation by ensuring the provision of a generous supply of land suitable for economic development;
    - Sustaining a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
    - Supporting the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
    - Promoting mixed-use development and improve integration between transport, economic development and other land uses; and
    - Ensuring a high standard of quality and design for new economic development.
- The tertiary (service) sector dominates the local employment market in terms of jobs and the number of VAT/PAYE registered businesses. Within this sector, the Borough possesses Northern Ireland's largest share of employment in health and social care.
- There are apparent relationships, in the context of the labour market, between the Borough and neighbouring council areas – particularly Belfast City, Mid & East Antrim, and Lisburn & Castlereagh City, to where many of our residents commute, and from where many of the Borough's workforce travel.
- Belfast International Airport is one of Northern Ireland's largest transportation and storage hubs, providing approximately 5,000 jobs within the Borough. In addition, BIA is an important regional airfreight centre that addresses the relative isolation of Northern Ireland from Mainland UK and Europe, thus providing critical access for local businesses to domestic and international markets.
- Whilst the Borough's population, economic activity and employment rates continue to increase, and unemployment and claimant count rates fall, the working age population is declining. Based upon current projections, the number of residents at working age will fall by 3.1% between 2014 and 2030; potentially resulting in a decline in the number

of residents in employment at the end of the Plan period should current employment rates remain constant.

- 366 hectares of land within the Borough are identified (in current Development Plans) as areas of existing employment and industry, whilst a further 248.30 hectares are identified as areas for future employment and industry use.
- It is estimated that approximately 155 hectares of land identified for future employment and industry use remain available for development. Of this area, some 91.5% is located within Metropolitan Newtownabbey and Ballyclare, with the residual 8.5% located in Antrim Town and Randalstown. This indicates a potential imbalance with regard to employment and industry lands throughout the Borough, based on existing Development Plan zonings.

**Retail**

- The RDS recognises the role of the Belfast Metropolitan Area, particularly Belfast City Centre, with regard to retail provision alongside that of services, administration, culture and education.
- The RDS identifies Antrim as a main hub due to its excellent healthcare provision and expanding retail offer.
- The SPPS requires the Local Development Plan to:
    - Secure a town centres first approach for the location of future retailing and other main town centre uses;
    - Adopt a sequential approach to the identification of retail and other main town centre uses;
    - Be informed by robust and up-to-date evidence in relation to need and capacity;
    - Protect and enhance diversity in a range of town centre uses appropriate to their role and function , such as leisure, cultural and community facilities, housing and business;
    - Promote high quality design to ensure that town centres provide sustainable, attractive, accessible and safe environments; and
    - Maintain and improve accessibility to and within the town centre.
- Retail provision is distributed throughout the Borough in the current hierarchy of centres comprising:
    - 1 Primary Retail Core (Antrim Town);
    - 4 Town Centres (Antrim Town, Ballyclare, Crumlin & Randalstown);
    - 2 District Centres(Abbey Centre & Northcott); and

  - 1 Local Centre (Glengormley).
- Prominent out-of-centre retail locations include:
  - Junction One; and
  - Numerous retail parks in close proximity to Abbey Centre District Centre.
- The Abbey Centre District Centre and surrounding retail provision may be the largest single concentration of comparison retail offer in Northern Ireland.
- The Borough's most prominent out-of-centre retail locations are sites at Junction One and outside the Abbey Centre District Centre – Valley Retail Park, Shore Road Retail Park, and Mill Road.
- There are a significant number of convenience retailers operating in the Borough, including Asda, Tesco, Marks and Spencer, Lidl and Iceland, including no less than 6 large superstore-format convenience retail outlets across the Borough – all of which are operated by Asda and Tesco
- Vacancy is a prevalent issue in the Borough, particularly in Antrim, Ballyclare and Crumlin Town Centres, and in Glengormley Local Centre.
- Consumer expenditure for convenience shopping has declined for each of the past 9 years – now estimated to be 14% below its 2005 peak. Conversely, comparison retail expenditure has continued to increase year-on-year since 2008.
- As a result of sustained competition within the convenience retail sector, particularly between the larger retailers such as Asda, Sainsburys and Tesco, and discount retailers, it is likely that larger stores may have to adapt their operating format to reflect and meet changing customer needs.
- Consumer habits are changing, especially in the context of convenience retailing, where there has been a move away from the traditional weekly shop in favour of more frequent, smaller quantity purchases. Consequently, local shopping is becoming increasingly important given the potential for competition with major convenience retailers.
- The Global economic downturn has been a major contributing factor in the growth of online retailing – in 2015 the UK accounted for 33.4% of all online sales in Europe.
- The Centre for Retail Research predicts that the number of out-of-centre stores in the UK may increase by 2.7% between 2012 and 2018, whilst town centres stores will have fallen by 19.9%, and neighbourhood retailing will have declined by 26.2%

**Commercial Leisure**

- The SPPS and existing Development Plans underpin the consideration that town centres are the appropriate location for commercial leisure development. Consequently, the SPPS promotes the adoption of a town centres first approach for the location of future commercial leisure provision.
- The Borough can capitalise upon the potential to provide space for commercial leisure development and to tap into the tourism industry centred on Belfast to the benefit of residents and visitors alike. This is particularly the case for Glengormley.
- Commercial leisure provision in the Borough is dominated by the service sector, particularly hospitality, with over 69% of the Borough's commercial leisure provision existing in the form of restaurants, cafes, hot food bars and licensed premises.
- Commercial leisure uses have an important complementary role to the primary shopping function of city and town centres, in addition to the significant contribution that they can make to the local day-time and night-time economies.
- The commercial leisure sector is highly complex and dynamic, as commercial leisure uses are particularly sensitive to changes in economic conditions, population, lifestyle, and fashion trends. As a result, forecasting the growth of this sector and identifying the need for new facilities is highly complicated.

**Tourism**

- Tourism can make an important contribution to the economy, society and environment, both locally and regionally, particularly where tourism facilities and associated infrastructure can be introduced or enhanced.
- The Regional Development Strategy promotes a sustainable approach to the provision of tourism infrastructure in order to deliver economic benefits.
- The SPPS advises that a tourism strategy should form part of the Local Development Plan, and that it should reflect wider regional tourism initiatives, and should address the following issues:
    - How future tourism demand is best accommodated;
    - Safeguarding of key tourism assets;
    - Identification of potential tourism growth areas;
    - Environmental considerations; and

    - Contribution of tourism to economic development, conservation and urban regeneration.

- A new Regional Tourism Strategy for Northern Ireland is being prepared by the Department of the Economy, once published; this should be taken account of in the emerging Local Development Plan.
- Approximately 11% of Northern Ireland's total accommodation room stock is located in the Borough – the third highest of all the LGDs.
- In 2015, the tourism industry was worth £34.2million to the local and regional economy.
- Tourism-related jobs accounted for 7% of the Borough's workforce (4,074 jobs).
- The number of people visiting the Borough has increased substantially over the past number of years, as awareness of attractions, and promotion of locations increases.
- Antrim Castle Gardens and Clotworthy House is the Borough's most visited attraction, with over 357,000 visitors in 2015, an increase of 61% from 2014.

**Agriculture, Fishing and Forestry**

- Our Borough contains a relatively low number of farms compared to other Council districts.
- Farm areas are located primarily on low less favoured lands which are disadvantaged and severely dis-advantaged in terms of farming activity.
- There has been a reduction in the amount of land cropped from 2013 until 2015.
- Eel fishing on Lough Neagh is the predominant commercial fishing type that is supported in our Borough.
- Recreational fishing activities occur along the Borough's four main rivers, Lough Neagh and Toome Canal.
- At present there are two fish farms within our Borough supporting the aquaculture of trout species.
- Need to encourage forest growth within our Borough to provide timber, biodiversity and access opportunities for the public as well as furthering Northern Ireland's forest coverage.
- Need to improve public access to forests and to utilise these areas as places of recreation.

- Improve the sustainable management of the forestry resource in our Borough.
- Provide those owning land with the information and the means to consider afforestation as a realistic alternative land use.

**Minerals**

- Antrim and Newtownabbey's position on top of the 'Antrim Lava Group' gives it stocks of igneous rocks useful for building and road stone.
- The Borough has an excellent resource of aggregate material i.e. sand, gravel & basalt.
- There is an extensive area of Lough Neagh Clay within our district however there are no current resources identified for the usage of the clay.
- There is a significant mineral resource of lignite located to the south-west of Crumlin, representing 250million tonnes with the ability to supply electricity for a 20year period.
- There is a potential shale gas resource at Lough Neagh; however the depths suitable for such are unknown due to the limited number of borehole investigations. Furthermore, Regional Planning Policy advises of a presumption against the unconventional extraction of hydrocarbons.
- The Lough Neagh basin holds prospective for intermediate and deep geothermal energy.
- Although it is not possible to quantify the amount of minerals required over the Plan period up to 2030, there will be a need to ensure that supplies of raw materials are provided in pace with any economic growth that occurs.
- The LDP will need to accommodate any potential expansion of existing quarries as well as the opening of new workings. It is therefore important that the Plan achieves a balance between economic development and safeguarding the most valuable and vulnerable areas of the environment from the detrimental effects of mineral extraction.
- There is also a need to ensure that there is a degree of protection afforded to Antrim natural environment given its contribution to the development of tourism and recreation.
- In line with the policy approach in the SPPS, the Plan's overall approach to mineral development should be to balance the demands of the mining and extractive industry with the need to protect and conserve the environment.

**Waste Management**

- The RDS promotes the adoption of the Waste Hierarchy and the proximity principle in order to manage our waste in a sustainable manner and to minimise the environmental impacts associated with waste management.
- The SPPS sets out the following regional strategic objectives:
    - To promote development of waste management and recycling facilities in appropriate locations'
    - To ensure that detrimental effects on people, the environment, and local amenity associated with waste management facilities are avoided or minimised; and
    - To secure appropriate restoration of proposed waste management sites for agreed after-uses.
- The Council is responsible for the management of municipal waste collection in the Borough, and operates five recycling centres;
- Antrim and Newtownabbey Borough Council is one of six councils in the east of NI which is part of the arc21 waste management group. Arc21 works on behalf of its member councils to guide, support and help them meet their legal requirements (under Article 23 of the Waste and Contaminated Land (NI) Order 1997), and drive forward innovative waste management programmes. Being part of arc21 will ensure the Council operates a co-ordinated approach to waste management with its neighbouring councils;
- The Council believes it has potential access to the necessary waste infrastructure to meet its current legislative targets in 2020, however the recent UK decision to leave the European Union may impact upon the accessibility of infrastructure based in continental Europe;
- The Council must adhere to DAERA's Waste Management Duty of Care Code of Practice, and the LDP must take account of this commitment;
- The Northern Ireland Local Authority Collected Municipal Waste Management Statistics – Annual Report 2014/15 indicates that:
    - The NI landfill rate has significantly decreased from 72.3 of all LAC municipal waste in 2006/07 to 42.7% in 2014/15
- 53.1 % of all municipal waste collected by the legacy Antrim Borough Council, and 44.1% of that relating to the former Newtownabbey Borough Council, was subsequently recycled or composted

**Energy**

- The DETI Strategic Energy Framework (2010) confirms a target of achieving 40% of NIs electricity consumption from renewable energy sources by 2020;
- NI relies heavily on fossil fuels to meet energy needs, with 65% of the Borough's households heating their homes using oil;
- Renewable energy production is becoming more common; with the annual proportion of electricity consumption from renewable sources in NI rising considerably in recent years, from 8.4% in 2010 to 25.4% in 2015;
- Of all renewable electricity generated within NI over the 12 month period January 2015 to December 2015, 91.1% was generated from wind. Such reliance on this source does mean that monthly renewable electricity generation volumes in NI can be prone to large fluctuations, due to changing weather conditions;
- Natural gas mains connection is available in main urban areas, and in 2011 19% of the Borough's households heated their homes using this source;
- The majority of the Borough has significant potential for Grid connection of additional small scale energy generation. However, parts of the northeast could have limited potential, and a substantial section of the northwest appears to have reached saturation point;
- There are five primary substations located within the Borough, three of which have reached their capacity limit and require investment to facilitate further generation on the 11kV system;
- Approved renewable energy development has been drawn to the south of the Borough, around the rural Lough Neagh lowlands. Wind turbines have tended to cluster in exposed upland areas towards the east of the Borough;
- Anaerobic Digestion plants in the Borough are small scale, focusing on processing farm waste rather than a means of creating renewable energy; and
- The infrastructure network for charging electric vehicles has recently been developed within the Borough, although the public's interest and investment in electric vehicles remains low.

# 1 Introduction

1.1 This evidence paper is one of a number being prepared to generate discussion and debate around key planning issues affecting the Borough. These evidence papers have informed the preparation of the Local Development Plan (LDP) Preferred Options Paper (POP).

1.2 This paper aims to present evidence and issues around facilitating economic development, and includes sections that consider some of the evidence that will inform the preparation of the LDP in relation to employment and industry; retail; commercial leisure; tourism; agriculture, fishing and forestry; minerals; waste management; and energy.

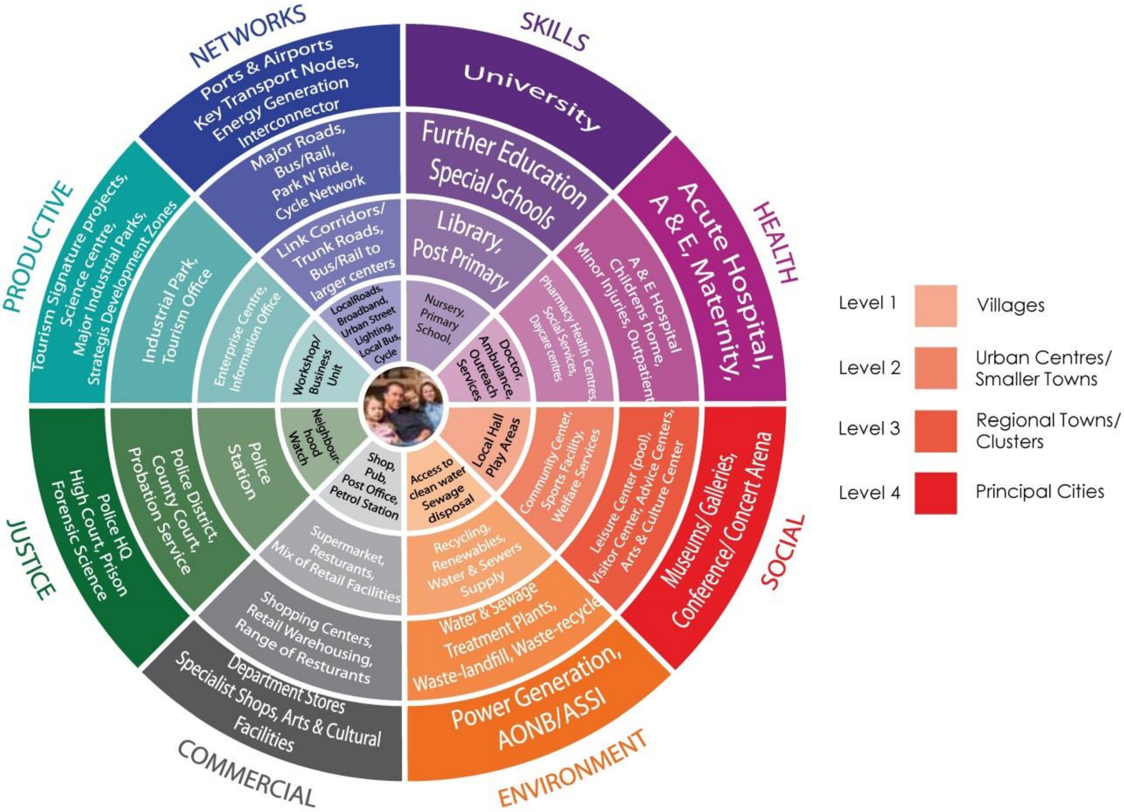
1.3 Further evidence papers in this series will include Meeting the Needs of Society and Shaping Our Environment.

1.4 The data in this paper has been drawn from a number of different sources and relate to varying timescales or points, these are noted accordingly. Information has been updated to the most recent datasets available where possible. Older data may relate to the legacy Antrim Borough Council and Newtownabbey Borough Council areas.

1.5 The Council is not responsible for the delivery of all services within the Borough, it will therefore be important to liaise closely with the various public sector service providers including central government departments and their agencies.

1.6 The location of businesses and other key economic developments is closely related to the size and function of each of our settlements. This is illustrated by the RDS Hierarchy of Settlements and Related Infrastructure Wheel (see Figure 1.1) where larger settlements have a greater range of businesses.

### Figure 1.1: Hierarchy of Settlements and Related Infrastructure Wheel




*Source: RDS, p24 / Strategic Investment Board*

1.7 The existing settlement hierarchy within the Borough is detailed in Table 1.1 below and is discussed in more detail within the Shaping Our Environment evidence paper.

### Table 1.1: Existing Settlement Hierarchy

| Settlement Type | Settlement Name | |
|---|---|---|
| **Metropolitan Urban Area** | Metropolitan Newtownabbey[a] | |
| **Main Hub** | Antrim | |
| **Small / Local Town** | Ballyclare | Randalstown |
| | Crumlin | |
| **Village** | Ballyeaston | Parkgate |
| | Ballynure | Straid |
| | Ballyrobert | Templepatrick |
| | Burnside (Cogry / Kilbride) | Toome |
| | Doagh | |
| **Hamlet / Small Settlement** | Ballycor | Killead |
| | Ballycraigy | Kingsmoss |
| | Bruslee | Lowtown |
| | Craigarogan | Millbank |
| | Creggan- Cranfield | Milltown |
| | Dunadry | Moneyglass |
| | Groggan | Roughfort |
| | Hillhead | Tildarg |

*[a] For the purposes of the new LDP, Metropolitan Newtownabbey includes that part of Greenisland transferred to the Borough of Antrim and Newtownabbey in April 2015.*

**Council Policy Context**

1.8 The Council's **Corporate Plan** 2030 sets out our vision for the Borough and identifies what we need to do between now and 2030 to achieve this. The Vision for the Borough up to 2030 is defined as "a prosperous place inspired by our people driven by ambition". The Corporate plan sets out a number of objectives in relation to place, people and prosperity. Our Local development Plan has a key role to play under the objective of "place" and the corporate plan states that "the preparation of a Local Development Plan will enable us to plan positively for the future of our Borough. We will ensure that lands are appropriately zoned and that our infrastructure is enhanced to develop the Borough for future generations."

1.9 Community planning is a new power for local Councils within Northern Ireland. Each Council is required to publish a **Community Plan**. Working with a wide range of partners, including representatives from the statutory, business, higher education, community and voluntary sectors, the Council will publish a long-term plan to improve the social, economic and environmental wellbeing of the Borough. The LDP will consider any land based spatial planning aspects of the Community Plan once it has been published.

**Regional Policy Context**

1.10 The **Draft Programme for Government Framework (PfG Framework) 2016 -2021** is a new approach which focuses on the major societal outcomes that the Northern Ireland Executive wants to achieve and provides a basis for all sectors to contribute to the development of plans and actions. The draft PfG Framework has 14 strategic outcomes which are supported by 42 indicators. The outcomes show the direction of travel for what the Executive understands are the needs of our society. The indicators show the change that is needed to bring about the outcomes. The delivery of many of the outcomes and indicators will be the responsibility for Central Government; however, the Local Development Plan may have a supporting role in this process. Any specific responsibilities for the LDP will be borne out of discussions with Central Government Departments.

1.11 The **Sustainable Development Strategy** (SDS) is designed to provide a framework that can support and inform decisions and associated actions to progress the sustainability agenda in Northern Ireland. The SDS adopts six Guiding Principles in order to achieve its vision of developing a society in a sustainable way, and recognises that whilst we must continue to respect the limits of our natural resources and ensure a high level of protection improvement, sustainable development should not prevent us from using or capitalising on these resources. The delivery of the Guiding Principles is assisted by six Priority Areas for Action that are outlined in the SDS.

1.12 The **Regional Development Strategy** (RDS) provides the regional planning policy context in relation to local development plans which supports the implementation of the Sustainable Development Strategy. The RDS is the spatial strategy for the Northern Ireland Executive, and has the purpose of delivering the spatial aspects of the Programme for Government. It adopts a balanced sub-regional approach to growth by recognising the importance of key settlements as centres for growth and prosperity. Councils will play a key role in its implementation as it is a statutory requirement within the **Planning Act (Northern Ireland) 2011**, that councils must 'take account of' the RDS in the preparation of a Local Development Plan.

1.13 The **Strategic Planning Policy Statement** (SPPS) provides regional planning policies in order to support the implementation of the RDS and the SDS. When preparing Local Development Plans, these policies must be taken into account. In addition, the policies detailed within the SPPS are material to all decisions with regard to individual planning applications and planning appeals.

# 2 Employment and Industry

2.1 This section relates to the topic of employment and industry, and identifies, collates, and discusses evidence comprising:

- Regional Policy Context;
- Existing Development Plans and Operational Planning Policy;
- Business and Employment Base;
- Land for Employment and Industry Development;
- Belfast International Airport and Nutt's Corner;
- Planning for Employment and Industry in the Future;
- Key Findings; and
- Next Steps.

2.2 Key findings, as a result of the evidence collated, are then outlined as main areas of consideration in the ongoing preparation of the Borough's new Local Development Plan. The paper concludes with a brief overview of the envisaged next steps in the process, with regard to this topic area, particularly with regard to the Preferred Options Paper and Plan Strategy stages.

2.3 Uses associated with employment and industry are generally considered to be those identified in Part B (Industrial and Business Uses) of the Schedule to the Planning (Use Classes) Order (Northern Ireland) 2015 – incorporating Use Classes B1 (Business), B2 (Light Industrial), B3 (General Industrial) and B4 (Storage or Distribution).

2.4 Statistical data relating to employment and industry is subject to regular amendment. The Labour Market Report, which provides an overview of economic activity, employment and unemployment in Northern Ireland, is published on a monthly basis. At the time of writing, the latest available Labour Market Report was that for September 2016. Reports will be updated to reflect the latest available information.

**Regional Policy Context**

**Everyone's Involved - Sustainable Development Strategy**

2.5 One of the six Priority Areas for Action outlined in the SDS relates to 'Building a dynamic, innovative economy that delivers the prosperity required to tackle disadvantage and lift communities out of poverty'. Objectives relate to increasing the number of jobs in the low-carbon economy, increasing energy efficiency, and ensuring that the population possess the necessary skill sets for these jobs. Another Priority Area is associated with 'Driving sustainable, long-term investment in key infrastructure to support economic and social development'. This requires that we ensure all economic development activities (including physical regeneration and investment in infrastructure) are carried out in a sustainable way, and that transport infrastructure is integrated and accessible to all members of society.

**The Regional Development Strategy (RDS) 2035 – Building a Better Future**

2.6 The RDS contains Regional Guidance (RG) and Spatial Framework Guidance (SFG), which seek to ensure an adequate and available supply of accessible land to facilitate economic growth through job creation (RG1), and the promotion of urban economic development at key locations throughout the Belfast Metropolitan Urban Area (BMUA) and ensure that sufficient land is available for jobs (SFG1).

2.7 In order to assist in the identification of strategic and locally important employment sites in the Local Development Plan process, the RDS provides an Employment Land Evaluation Framework. This is a three stage process involving the consideration of existing lands, understanding anticipated future need, and the identification of a range of new sites based upon an established appraisal criteria. Table 2.1 below summarises the Employment Land Evaluation Framework.

**Table 2.1: The Employment Land Evaluation Framework**

| | |
|---|---|
| **Stage 1**<br>Taking Stock of the Existing Situation | An initial assessment of the 'fitness for purpose' including the environmental implications of the existing employment land portfolio. This is principally in order to identify the 'best' employment sites to be retained and protected and identifying sites that should clearly be released for other uses. |
| **Stage 2**<br>Understanding Future Requirements | Quantify the amount of employment land required across the main business sectors during the development plan period. This is achieved by assessing both demand and supply elements and assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites. Account should also be taken of turnover of existing sites due to relocation or closures. Both short/medium term and strategic provision need to be considered in this process. |
| **Stage 3**<br>Identifying a 'New' portfolio of sites | Devise qualitative site appraisal criteria to determine which sites meet the occupier or developer needs. Confirm the existing sites to be retained, replaced or released, and any gaps in the portfolio. In this allocation, consideration should be given to previously used sites, and in the reallocation, the environmental impact of one site relative to others should be included. The results of Stage 2, together with this site-appraisal should provide a robust justification for altering allocations for employment land. |

*Source: Regional Development Strategy 2035, Department for Regional Development (page 32).*

2.8 The RDS advises that lands that are currently zoned for economic development purposes should be afforded protection in Local Development Plans due to their value as a resource which attracts local and external investment.

**Strategic Planning Policy Statement for Northern Ireland (SPPS)**

2.9 The SPPS confirms that the regional strategic objectives for facilitating economic development through the planning system are to:

- promote sustainable economic development in an environmentally sensitive manner;
- tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality;
- sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
- support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
- promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and
- ensure a high standard of quality and design for new economic development.

2.10 Economic development is not restricted to urban areas. The SPPS aims to sustain vibrant rural communities through the provision of support for rural economic development of an appropriate nature and scale.

2.11 Through Regional Strategic Policy, the SPPS promotes the zoning of sites for economic development in larger settlements such as cities and towns. It advises that, within villages and small settlements, land will not normally be zoned, however proposals will be considered in accordance with the normal planning process. In rural areas, proposals will be considered particularly where these are likely to provide benefit to the rural economy and support for rural communities.

**Existing Development Plans and Operational Planning Policy**

2.12 The Antrim Area Plan and the Belfast Metropolitan Area Plan both identify areas of existing employment/industry, and allocate lands for employment/industry use in the future. This information is presented and considered in greater detail later in this evidence paper.

2.13 Whilst the SPPS sets out the strategic direction and core planning principles for economic development for all of Northern Ireland, operational planning policy is currently contained within Planning Policy Statements (PPSs) produced by the Department of the Environment (DOE). The existing PPSs will be superseded when Council adopts a new Plan Strategy for the Borough. The Plan Strategy will contain new detailed operational policies that are tailored to address local circumstances.

2.14 Current Operational Planning Policy with regard to economic development is contained within Planning Policy Statement 4: Planning and Economic Development (PPS 4) and Planning Policy Statement 21: Sustainable Development in the Countryside (PPS 21). Until a new Plan Strategy is adopted by Council, transitionary measures allow for the retention of the policy provisions contained within PPS 4 and PPS 21.

2.15 The key aim of PPS 4 is to facilitate the economic development needs of the Region in ways consistent with protection of the environment and the principles of sustainable development. It sets out planning policies for economic development uses and indicates how associated growth can be accommodate and promoted in development plans.

2.16 Operational planning policies within PPS 4 relate to:

- Economic Development in Settlements (Policy PED 1);
- Economic Development in the Countryside (Policy PED 2);
- Expansion of an Established Economic Development Use in the Countryside (Policy PED 3);
- Redevelopment of an Established Economic Development Use in the Countryside (Policy PED 4);
- Major Industrial Development in the Countryside (Policy PED 5);
- Small Rural Projects (Policy PED 6);
- Retention of Zoned Land and Economic Development Uses (Policy PED 7);
- Development Incompatible with Economic Development Uses (Policy PED 8); and
- General Criteria for Economic Development (Policy PED 9).

2.17 The primary aim of PPS 21 is to manage development in the countryside that is in a manner consistent with the RDS, and which strikes a balance between the need to protect the countryside from unnecessary or inappropriate development, whilst supporting rural communities. It sets out planning policies and main planning considerations in assessing proposals for development in the countryside.

2.18 Relevant operational planning policies contained within PPS 21 relate to:

- Development in the Countryside (Policy CTY 1);
- Development in Dispersed Rural Communities (Policy CTY 2);
- The Conversion and Re-Use of Existing Buildings (Policy CTY 4);
- Ribbon Development (Policy CTY 8);

- Integration and Design of Buildings in the Countryside (Policy CTY 13);
- Rural Character (Policy CTY 14);
- The Setting of Settlements (Policy CTY 15); and
- Development Relying on Non-Mains Sewerage (Policy CTY 16).

2.19 A strategic level review of operational planning policy is examined further in the Policy Review Evidence Paper.

**Business and Employment Base**

2.20 This section provides an overview of the employment and economic base of the Borough within the context of the Northern Ireland economy, and examines employment sectors, unemployment and economic activity rates.

2.21 The **Invest NI North East Regional Briefing for Antrim and Newtownabbey and Mid and East Antrim Borough Councils**, published in January 2016, advises that Antrim and Newtownabbey has (based on the Census of Employment, 2013) a workforce of 55,079. The Borough has Northern Ireland's largest employment share for health and social work (22%) within the service sector, whilst manufacturing is also a major employer with 12% of the workforce. Furthermore, the Borough has the largest transportation and storage hub predominantly based around Belfast International Airport at Aldergrove, providing approximately 5,000 jobs.

**Existing Antrim and Newtownabbey Borough Council Employment Base**

2.22 Employment is generally expressed in terms of three sectors, namely primary, secondary and tertiary. Primary sector relates to agriculture, forestry and fishing and the mining and quarrying of natural resources. The Secondary sector related to manufacturing and the processing of natural resources. The tertiary sector refers to the service sector, and includes retailing, hospitality, transportation and distribution.

2.23 Between 2001 and 2011, there was a significant change in the employment sector pattern both within the Borough and in the context of Northern Ireland. Table 2.2 outlines the changes in employment sector patterns between 2001 and 2011 with regard to both Antrim and Newtownabbey Borough and Northern Ireland.

**Table 2.2: Industry Sector Employment in Antrim & Newtownabbey and Northern Ireland – 2001 & 2011**

| Sector | Antrim and Newtownabbey Borough Council | | Northern Ireland | |
|---|---|---|---|---|
| | 2001 | 2011 | 2001 | 2011 |
| Primary | 5,322 (9.06%) | 831 (1.27%) | 85,045 (12.39%) | 19,794 (2.49%) |
| Secondary | 8,740 (14.88%) | 11,424 (17.42%) | 102,141 (14.88) | 151,431 (19.04%) |
| Tertiary | 44,667 (76.06%) | 53,309 (81.31%) | 499,458 (72.74%) | 624,038 (78.47%) |

*Source: Northern Ireland Census 2001 & 2011*

2.24 Of all the Borough's residents who were in employment in 2001, just over 9% were employed in primary sector industries. However, by 2011, this had reduced considerably to less than 1.5%. With regard to secondary sector industries, the period between 2001 and 2011 observed an increase of just over 2.5%, whereas the tertiary sector experienced an increase in excess of 5%.

2.25 In the context of Northern Ireland, the decline in employment in the primary sector was just under 10%, with secondary and tertiary sector employment increasing by over 4% and almost 6% respectively.

**Business Stock**

2.26 In 2014, 3,655 VAT/PAYE registered businesses were operating in the Borough, representative of 5.4% of the Northern Ireland total.

2.27 Table 2.3 outlines the number of VAT/PAYE registered businesses (by sector) in the Borough. These figures exclude smaller businesses and self-employed that fall below the VAT/PAYE thresholds.

**Table 2.3: VAT/PAYE Registered Businesses in Antrim and Newtownabbey Borough Council in 2014**

| Sector | Antrim and Newtownabbey Borough Council | |
|---|---|---|
| | No. of VAT/PAYE Registered Businesses | % of Total |
| **Primary** | 665 | 18.19% |
| **Secondary** | 775 | 21.20% |
| **Tertiary** | 2,215 | 60.60% |

*Source: Northern Ireland Neighbourhood Information Service (NINIS), NISRA, 2014*

2.28 This information shows that whilst the primary sector employs just over 1% of residents in the Borough, it accounts for over 18% of all VAT/PAYE registered businesses in the area. The manufacturing (secondary) sector accounts for over 21% of registered businesses. By far the largest sector in the Borough is that of the service (tertiary) sector with almost 61%, an indication perhaps of the role of Antrim and Newtownabbey as a hub for storage and distribution, and underlining the importance of the hospitality industry to the Borough.

2.29 When collated in terms of size of the VAT/PAYE registered businesses (based on employee numbers), just over 87% are categorised as 'micro' (with up to nine employees), and almost 11% included within the 'small' category. 'Medium' and 'large' enterprises account for less than 1.5% of businesses in the Borough. Table 2.4 provides details of VAT/PAYE registered businesses in the Borough in the context of size. The predominance of micro businesses in the Borough underlines the importance of small businesses in the local economy.

**Table 2.4: Number of Businesses by Size (2014)**

| Size of Business | Antrim and Newtownabbey Borough Council | |
|---|---|---|
| | No. of Businesses | % of Total |
| **Micro (0-9)** | 3,185 | 87.02% |
| **Small (10-49)** | 390 | 10.66% |
| **Medium (50-249)** | 70 | 1.91% |
| **Large (250+)** | 15 | 0.41% |

*Source: North East Regional Briefing: Antrim & Newtownabbey and Mid & East Antrim, Invest NI, Jan 2016.*

**Businesses in Antrim and Newtownabbey**

2.30 According to the Belfast Telegraph's Top 100 Companies in Northern Ireland (May 2016), in terms of profit earnings of NI registered companies; no less than twelve are based in, or have a major presence in the Borough. These companies are:

- Shrader Electronics (6);
- Bombardier (11);
- John Henderson/Henderson Group (13);
- Randox Holdings (20);
- Retlan Manufacturing Ltd/SDC Trailers (37);
- Brett Martin (52);
- H&A Holdings (57);
- Chain Reaction Cycles (59);
- Multi Packaging (68);
- BI Electrical Services (69);
- Caterpillar NI (72); and
- Ballyvesey Holdings (80).

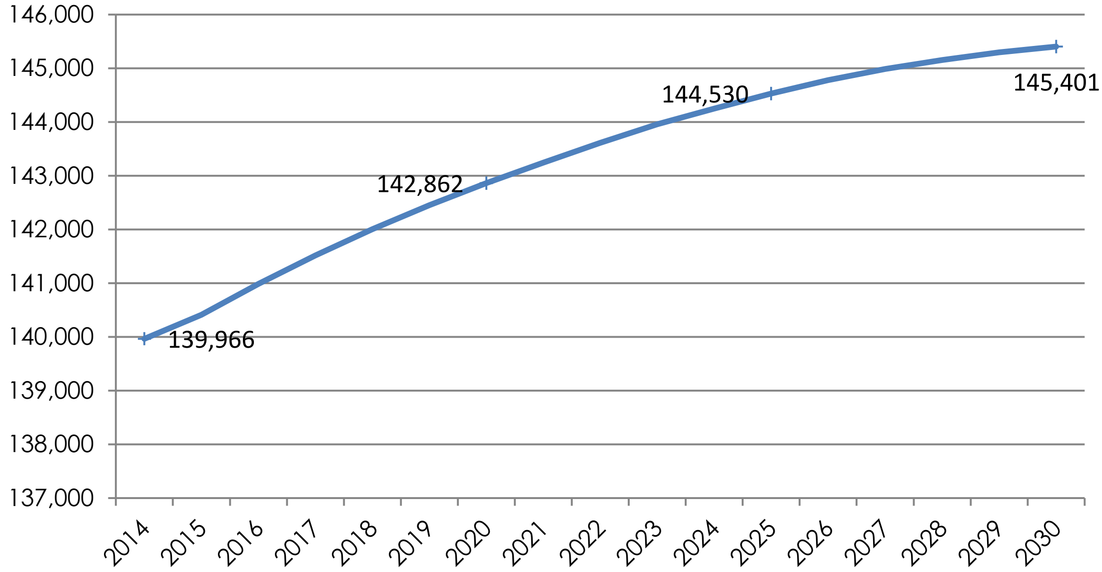
2.31 In the context of the largest commercial employers in Northern Ireland, five of the top 50 companies are based, or have a major presence in the Borough. These are:

- Bombardier (2);
- John Henderson/Henderson Group (10);
- Caterpillar NI (18);
- Shrader Electronics (32); and
- Robinson Services (35).

### Population and Labour Market

2.32 Updated population projections, released by NISRA indicate that the usually resident population of Northern Ireland is expected to increase by 7% to over 1.9million by the end of the Plan period (2030). With regard to the Borough, it is anticipated that the resident population will increase by approximately 3% from 139,966 (2014) to 145,401 (2030). Figure 2.1 shows the 2014-based population projections specific to Antrim and Newtownabbey through to the end of the Plan period.

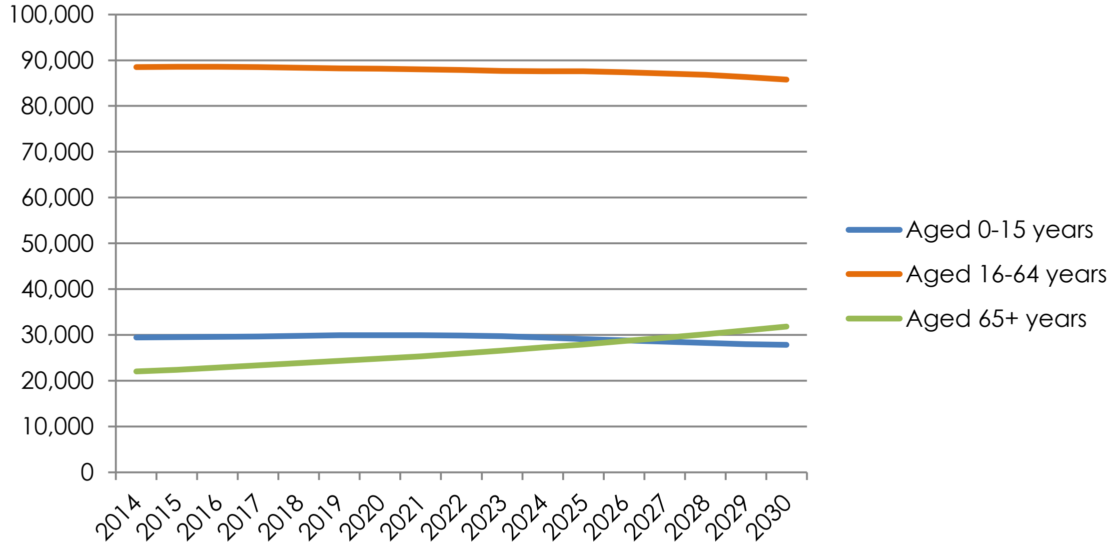
**Figure 2.1: Population Projection for Antrim and Newtownabbey Borough Council (2014-2030)**




*Source: 2014-Based Population Projections for Northern Ireland, NISRA, October 2015*

2.33 Whilst the Borough's population is anticipated to increase through to the end of the Plan period, as with the regional trend, it will continue to age. The population aged 65 years and over is expected to increase by over 44% from 21,994 in 2014 to 31,807 in 2030. Furthermore, given the rate of growth with regard to this age group, by the end of the Plan period, the number of residents aged 65 years and over will exceed that of the 0-15 year age group (Figure 2.2).

**Figure 2.2: Population Projection (By Age Group) for Antrim and Newtownabbey Borough Council**



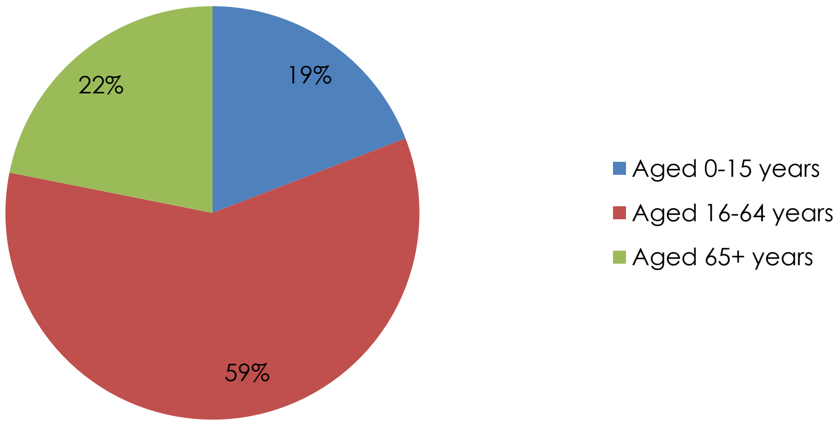

*Source: 2014-Based Population Projections for Northern Ireland, NISRA, October 2015*

2.34 As a consequence of the aging population, it is estimated that the working age population (16-64 years) will decline by approximately 3.1% from 88,527 in 2014 to 85,780 in 2030.

2.35 This trend of a declining working age population has been forecast across most LGDs in Northern Ireland with only four Councils experiencing an increase – namely Mid Ulster District, Armagh City, Banbridge and Craigavon Borough, Newry, Mourne and Down District, and Lisburn and Castlereagh City Councils.

2.36 At the end of the Plan period, residents in the Borough aged 0-15 years will account for 19% of the population, with those aged 65 and over accounting for 22%. Residents of working age will represent 59% of the population – a decrease from 63% in 2014. Figure 2.3 outlines the breakdown of the Borough's population at the end of the Plan period.

**Figure 2.3: Population of Antrim and Newtownabbey Borough Council by Age Sector (2030)**



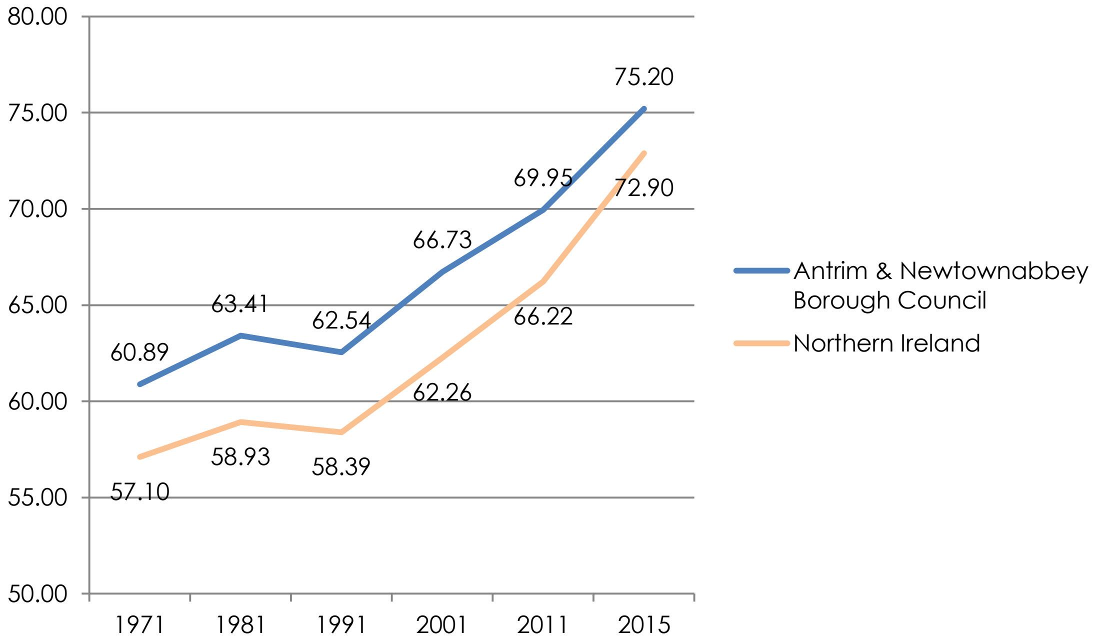

*Source: 2014-Based Population Projections for Northern Ireland, NISRA, October 2015*

2.37 A decreasing working age population, together with an increase in those aged 65 and over, will influence figures relating to economic activity, employment and unemployment throughout the Plan period. These effects are outlined later in this paper.

2.38 **Economic activity** relates to the proportion of the resident population who are of working age and are either employed or unemployed, and includes those who are currently participating in Government training schemes.

2.39 Overall, the economic activity rate in the Borough has increased between 1971 through to 2011 and most recent figures relating to 2015. Through the combination of data relating to the legacy councils, the rate of economic activity in the Borough has consistently remained above 60%, and exceeds that of the Northern Ireland average (Figure 2.4). By 2015, economic activity in the Borough had increased to just over 75%, with the Northern Ireland average at just less than 73%.

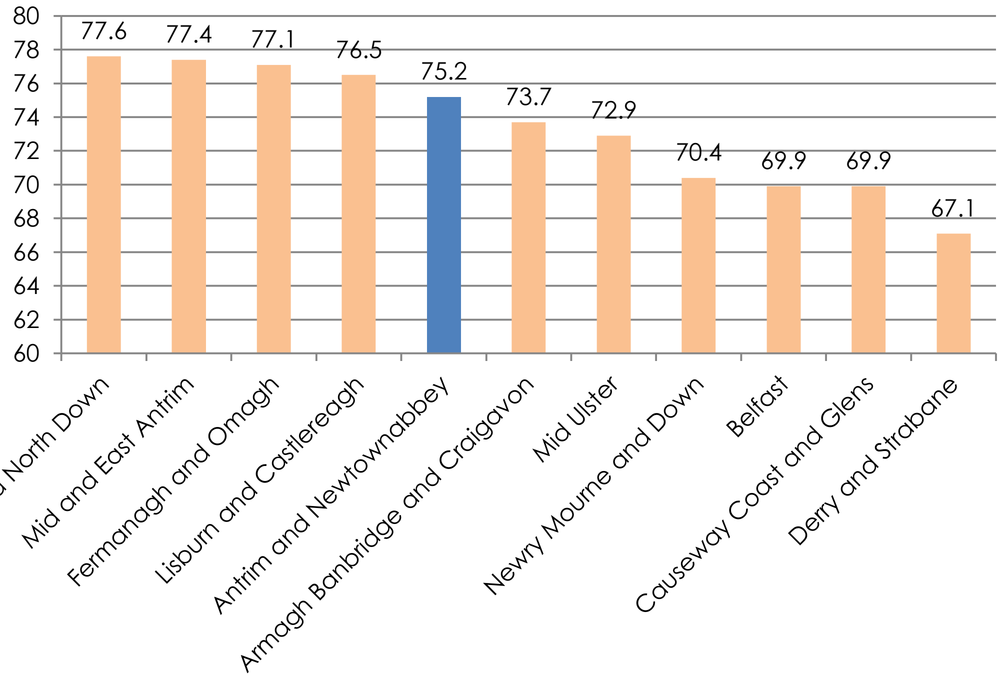
**Figure 2.4: Economic Activity Rates in Antrim and Newtownabbey Borough Council and NI between 1971 & 2015**




*Source: Northern Ireland Census 1971 – 2011*
Labour Force Survey Local Area Database 2015, NISRA, June 2016

2.40 With an economic activity rate of 75.2%, the Borough currently ranks fifth when compared with other Local Government Districts in Northern Ireland (Figure 2.5). This identifies an improvement on the previous year, where the Borough ranked in sixth place with an economic activity rate of 74%.

**Figure 2.5: Economic Activity Rates of NI Local Government Districts (2015)**

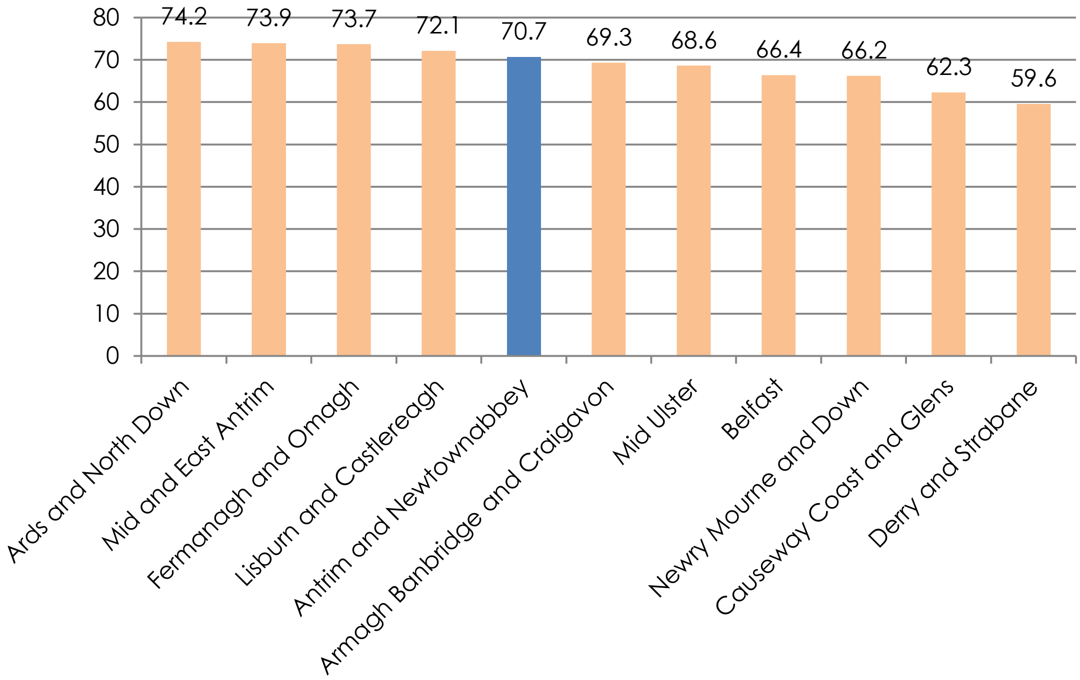



*Source: Labour Force Survey Local Area Database 2015, NISRA, June 2016*

2.41 According to the Labour Force Survey Local Area Database 2015 (LAD 2015), published by NISRA in June 2016, the rate of **employment** in the Borough (for those aged 16 – 64) was 70.7%, with an estimated 62,602 residents in either full or part time employment.

2.42 As Figure 2.6 shows, the Borough ranks fifth when compared with other Local Government District in Northern Ireland. This represents a decrease of 0.8% in the Borough's employment rate compared with the previous year (71.5%), and has resulted in the Antrim and Newtownabbey slipping from third place overall.

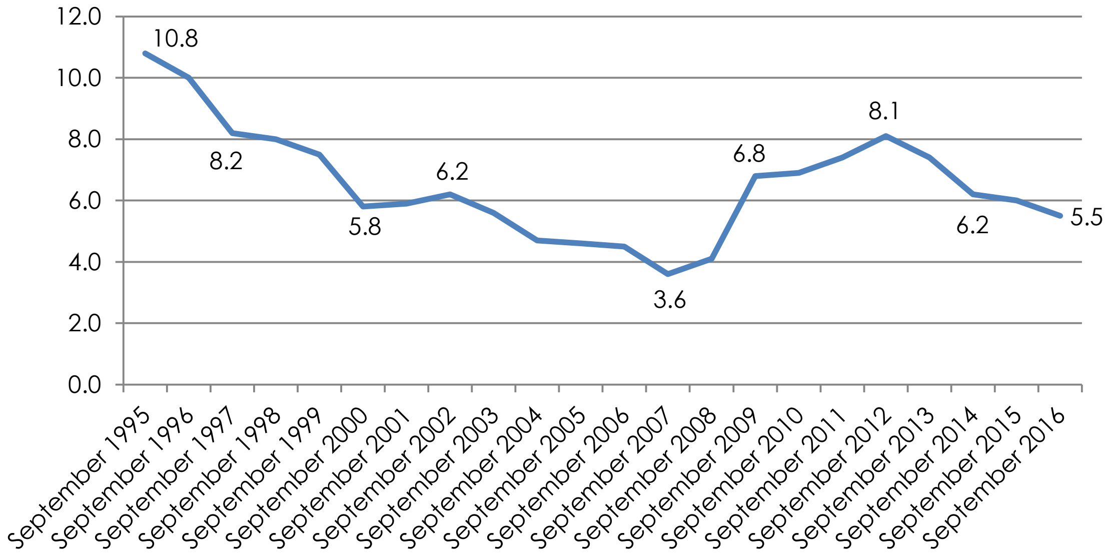
**Figure 2.6: Employment Rates of NI Local Government Districts (2015)**




*Source: Labour Force Survey Local Area Database 2015, NISRA, June 2016*

2.43 Between 1995 and 2007, there was a marked decline in the **unemployment** rate in Northern Ireland from 10.8% to 3.6%. However, with the onset of the global economic downturn in 2008, the unemployment rate increased sharply from 4.1% in 2008 to 6.8% in 2010, reaching a high of 8.1% in 2012. Since 2012, the unemployment rate has steadily decreased to its current level of 5.5% (Jun-Aug 2016). Figure 2.7 illustrates the historical trend with regard to the unemployment rate in Northern Ireland.

**Figure 2.7: Unemployment Rate in Northern Ireland (Jun-Aug 1995 to Jun-Aug 2016)**

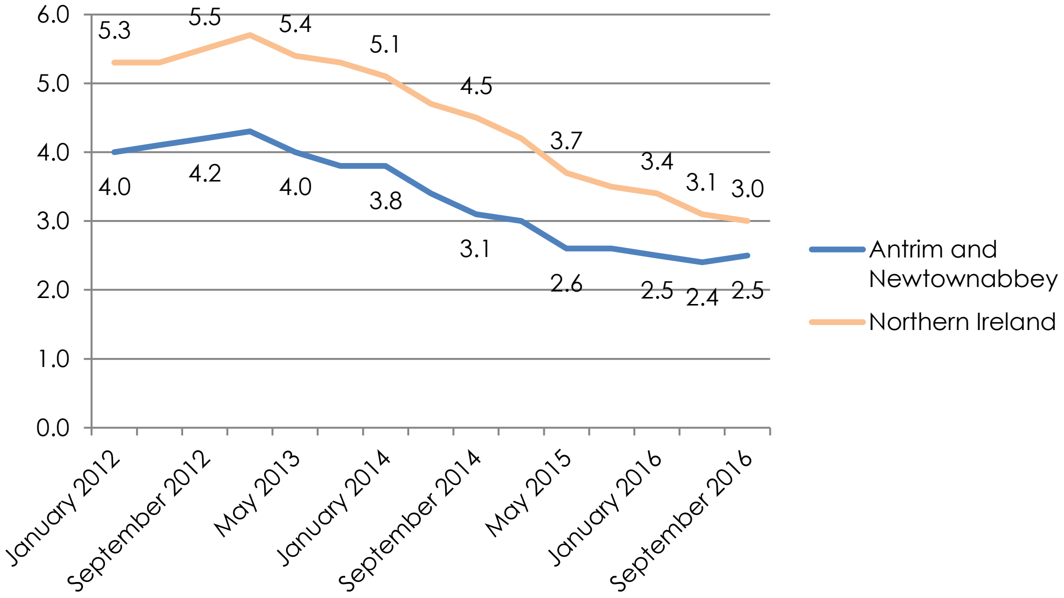



*Source: Labour Force Historical Data, Department for the Economy/NISRA, October 2016*

2.44 Information relating to the unemployment rate is not available at LGD level. However, the **claimant count** (the number of people claiming employment related benefits) can be used as a guide.

2.45 Following the onset of the global economic downturn in 2008, the claimant count in the Borough rapidly increased from 1.5% in May 2008 to 4.1% in May 2009, and 4.7% in May 2010. By January 2013, whilst the rate of increase had eased, the claimant rate reached a peak of 4.3% of the working age population resident in the Borough. Since 2013, the claimant count for Antrim and Newtownabbey has continued to fall to pre-2009 levels, currently sitting at 2.5% (September 2016). Figure 2.8 illustrates the local and regional trends with regard to claimant count between September 2011 and September 2016.

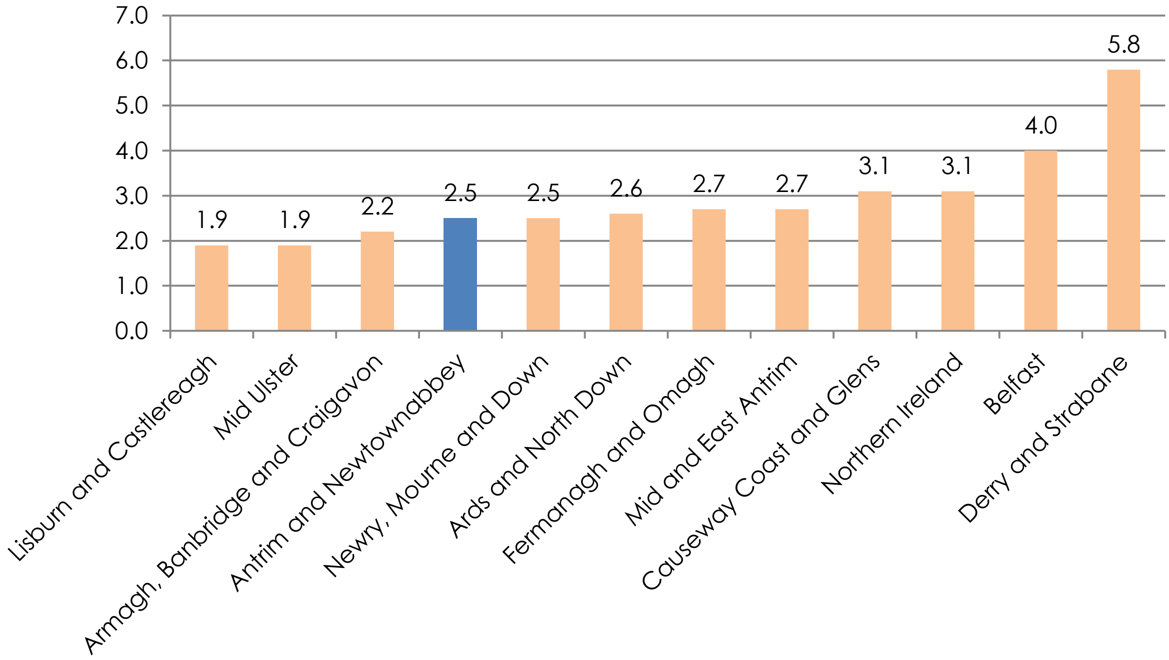
**Figure 2.8: Claimant Count in Antrim and Newtownabbey Borough Council and NI between January 2012 and September 2016**




*Source: Department for the Economy/NISRA*

2.46 With a claimant count of 2.5% of the resident working age population, the Borough currently ranks in joint third place (with Newry, Mourne & Down) in terms of the lowest claimant count rates across all LGDs in Northern Ireland (Figure 2.9).

**Figure 2.9: Claimant Count Rates in Northern Ireland Local Government Districts (September 2016)**




*Source: Northern Ireland Labour Market Report June 2016, Department for the Economy/NISRA*

2.47 Both the Northern Ireland unemployment rate and the claimant count for Antrim and Newtownabbey signifies that employment prospects for residents are improving as both rates are in general decline – fewer people out of work and fewer people claiming unemployment related benefits.

**Labour Market throughout the Plan Period**

2.48 Having considered the recently updated information with regard to economic activity and employment rates within the Borough, together with unemployment rates for Northern Ireland, it is possible to provide an overview of the Labour Market both locally and regionally. Table 2.5 provides an outline of the labour market in 2015 and 2030 with regard to the Borough and Northern Ireland.

**Table 2.5: Overview of Labour Market in Antrim and Newtownabbey Borough Council & NI in 2015 and 2030**

| | Population | | Economic Activity | | Employment | |
|---|---|---|---|---|---|---|
| | Usually Resident | Working Age (16-64) | Active | Inactive | Employed | Not Employed |
| **Antrim and Newtownabbey Borough Council** | | | | | | |
| 2015 | 140,410 | 88,546 | 66,587 | 21,959 | 62,602 | 3,995 |
| 2030 | 145,401 | 85,780 | 64,507 | 21,273 | 60,646 | 3,870 |
| Change | + 4,991 | -2,766 | -2,080 | -686 | -1,956 | -125 |
| % Change | +3.6% | -3.1% | -3.1% | -3.1% | -3.1% | -3.1% |
| | | | | | | |
| **Northern Ireland** | | | | | | |
| 2015 | 1,851,228 | 1,174,605 | 856,287 | 318,318 | 803,430 | 51,377 |
| 2030 | 1,980,017 | 1,170,790 | 853,506 | 317,284 | 800,820 | 51,210 |
| Change | +128,789 | -3,815 | -2,871 | -1,034 | -2,610 | -167 |
| % Change | +7.0% | -0.3% | -0.3% | -0.3% | -0.3% | -0.3% |

*Source: 2014-Based Population Projections for Northern Ireland, NISRA, October 2015.*
*Labour Force Survey Local Area Database 2015, NISRA, June 2016.*

*Assumes: Economic Activity Rates will remain constant at 75.2% (Antrim and Newtownabbey Borough Council) and 72.9% (NI) as per LAD 2015.*
*Employment Rate will remain constant at 70.7% (Antrim and Newtownabbey Borough Council) and 68.4% (NI) as per LAD 2015.*
*Unemployment Rate will remain constant at 6.0% (NI) as per LAD 2015.*
*Note: Unemployment Rate for NI applied to Antrim and Newtownabbey Borough Council in absence of specific data.*

2.49 This information highlights that the Borough's population will increase throughout the Plan period, however, there will be approximately 2,000 fewer residents in employment by 2030. This does not signify fewer employment opportunities, but is instead related to the declining working age population as referred to earlier in this report. It is clear that this decline has transferred directly to estimates relating to economic activity and employment.

### Employee Jobs in the Borough

2.50 The Northern Ireland Business Register and Employment Survey (BRES) 2015, published by the Department for the Economy (DfE) in September 2016, advised that, in September 2015, the total number of employee jobs in the Borough amounted to 55,937. This represented an increase of 255 (0.5%) over the preceding year, and 1,550 (2.8%) since September 2011. Table 2.6 provides a summary with regard to employee jobs in the Borough between 2011 and 2015.

**Table 2.6: Employee Jobs in Antrim and Newtownabbey Borough Council**

| Year | Male | | | Female | | | Total[1] |
|---|---|---|---|---|---|---|---|
| | Full-Time | Part-Time | Total | Full-Time | Part-Time | Total | |
| 2011 | 22,452 | 4,472 | 26,924 | 12,415 | 15,048 | 27,463 | 54,387 |
| 2012 | 21,983 | 4,637 | 26,619 | 12,155 | 15,803 | 27,958 | 54,577 |
| 2013 | 22,392 | 4,748 | 27,141 | 12,447 | 15,492 | 27,939 | 55,079 |
| 2014 | 23,332 | 4,661 | 27,992 | 12,972 | 14,719 | 27,960 | 55,682 |
| 2015 | 23,301 | 4,870 | 28,171 | 12,875 | 14,891 | 27,766 | 55,937 |

*Source: Northern Ireland Business Register and Employment Survey (BRES), DFP, February 2016*
*[1] May not cast due to rounding*

2.51 Of the employee jobs held in the Borough in September 2015, 65% were full-time positions. The majority of part-time posts (75%) were held by females, whereas 64% of full-time posts were filled by males. Overall, employee jobs in the Borough were equally distributed between males and females.

2.52 Between 2011 and 2015, the number of males who were in employment increased by 4.6% from 26,924 to 28,171. The number of males employed on a full-time basis increased by 3.8%, and those in part-time employment increased by 8.9%. During the same period, the number of females in employment increased by 1.1% from 27,463 to 27,766. The number of females employed in full-time posts increased by 3.7%, whilst part-time posts fell by 1%.

2.53 In terms of the split between public and private sector employment, between 2011 and 2015, the number of people employed in the public sector fell from 16,220 to 14,356 – a decline of 11.5%. As a result, the public sector now accounts for 26% of all employee jobs in the Borough, compared with 30% in 2011. The number of private sector jobs has grown from 38,167 in 2011 to 41,581 in 2015 – an increase of 8.9%.

2.54 The Northern Ireland Business Register and Employment Survey 2015 also provides details of employee jobs in the Borough broken down into sectors of employment. Table 2.7 outlines the changes in these sectors between September 2011 and 2015.

**Table 2.7: Employee Jobs in Antrim and Newtownabbey Borough Council by Employment Sector 2011 – 2015**

| Employment Sector | Employee Jobs | | | | |
|---|---|---|---|---|---|
| | **2011** | **2012** | **2013** | **2014** | **2015** |
| **Construction** | 2,963 | 2,717 | 2,562 | 2,355 | 2,587 |
| **Manufacturing** | 6,120 | 5,853 | 6,407 | 6,304 | 7,370 |
| **Other** | 828 | 995 | 923 | 932 | 894 |
| **Services** | 44,476 | 45,014 | 45,187 | 46,090 | 45,086 |
| ***Total*** | *54,387* | *54,577* | *55,079* | *55,682* | *55,937* |

*Source: Northern Ireland Business Register and Employment Survey 2015, DFP, September 2016*

2.55 Between September 2011 and September 2015, the number of employee jobs increased by 2.8% from 54,387 to 55,937. Whilst all other employment sectors experienced an increase in the number of jobs, the construction sector observed a reduction in excess of 12% throughout the period.

2.56 Throughout the period, the service sector was by far the largest in terms of employee jobs, accounting for almost 81% of all jobs in the Borough in 2015. Over 13% of employee jobs were attributed to the manufacturing sector, with a further 4.6% associated with construction.

2.57 Whilst the split between full and part-time positions has been outlined above, this information indicates that the majority of part-time employee jobs (97.2%)

were in the service sector. Of all jobs in the service sector, approximately 43% were part-time positions.

2.58 The Northern Ireland Census 2011 indicates that, on Census day, approximately 52,000 residents of the Borough advised that they were currently in employment. Of these residents, over 45% were employed within the Borough, with the remainder commuting to other areas for work purposes. Of these, almost 37% (19,001) worked in Belfast, 7.9% (4,100) in Mid and East Antrim, and 4.7% (2,420) in Lisburn and Castlereagh.

2.59 Furthermore, in the region of 49,060 people across Northern Ireland advised that they were in employment in the Antrim and Newtownabbey Borough Council area. Whilst 48.5% (24,000) were already resident in the Borough, 17.2% commuted from Mid and East Antrim, 12.1% from Belfast, and 7% from Lisburn and Castlereagh.

**Table 2.8: Travel to Work Figures (Antrim & Newtownabbey Borough Council) 2001**

| To/From | From Antrim & Newtownabbey | To Antrim & Newtownabbey | Net Difference |
|---|---|---|---|
| **Antrim & Newtownabbey** | 23,787 | 23,787 | 0 |
| **Ards & North Down** | 783 | 1,812 | +1,029 |
| **Armagh, Banbridge & Craigavon** | 472 | 1,493 | +1,021 |
| **Belfast** | 19,001 | 5,920 | -13,081 |
| **Causeway Coast & Glens** | 288 | 1,231 | +943 |
| **Derry & Strabane** | 94 | 197 | +103 |
| **Fermanagh & Omagh** | 35 | 187 | +152 |
| **Lisburn & Castlereagh** | 2,428 | 3,430 | +1,002 |
| **Mid & East Antrim** | 4,100 | 8,420 | +4,320 |
| **Mid Ulster** | 642 | 1,717 | +1,075 |
| **Newry, Mourne & Down** | 370 | 866 | +496 |

*Source: Northern Ireland Census 2011, NISRA*

2.60 Table 2.8 summarises, in the context of Antrim and Newtownabbey Borough Council, the usual place of residence of those who work in the Borough. The interrelationship between the Borough and the adjacent Belfast City, Mid & East Antrim Borough and Lisburn & Castlereagh City Councils is self-evident as the majority of employed residents of the Borough commute to these LGDs for work purposes. With the exception of Belfast City, Antrim and Newtownabbey Borough manages to attract more commuters from each Council area than it respectively loses.

**Land for Employment and Industry Development**

**Current Employment and Industry Lands**

2.61 The Antrim Area Plan and the Belfast Metropolitan Area Plan collectively identify approximately 614 hectares of land for employment/industry purposes in the Borough. Existing employment and industry lands account for 366 hectares, whilst designations for 'future industry/employment use' amount to 248.3 hectares.

2.62 With specific regard to existing employment and industry lands within the Borough, 86 hectares of land are identified in Antrim Town – at historic industrial locations including Steeple, New Park, Springfarm, Rathenraw, and at the former Enkalon site. A further 280 hectares are detailed in Metropolitan Newtownabbey and Ballyclare. Details of these sites are provided in Table 2.9.

**Table 2.9: Existing Employment/Industry Lands in Antrim and Newtownabbey Borough Council**

| Area Plan | Reference | Location | Site Area (ha) |
|---|---|---|---|
| Antrim Area Plan 1984 – 2001 | **Antrim Town** | | |
| | | Kilbegs Road, Antrim | ≈ 15.00 |
| | | Enkalon | ≈ 25.00 |
| | | Springfarm | ≈ 8.00 |
| | | Steeple (West) | ≈ 2.00 |
| | | Steeple (East) | ≈ 13.00 |
| | | Rathenraw | ≈ 5.00 |
| | | Newpark | ≈ 18.00 |
| | *Sub-Total* | | *≈ 86.00* |
| Belfast Metropolitan Area Plan 2015 | **Metropolitan Newtownabbey** | | |
| | Zoning MNY 08 | Abbey Business Park | 1.63 |
| | Zoning MNY 09 | Quay Road | 4.68 |
| | Zoning MNY 10 | Church Road | 18.09 |
| | Zoning MNY 11 | Doagh Road/Cloughfern Avenue | 22.09 |
| | Zoning MNY 12 | Glenville Road | 1.79 |
| | Zoning MNY 13 | FG Wilson, Doagh Road | 7.20 |
| | Zoning MNY 14 | Glenwell Road | 1.88 |
| | Zoning MNY 15 | Mallusk Industrial Estate, South of Antrim Road | 189.83 |
| | Zoning MNY 16 | Mallusk Industrial Estate, North of Antrim Road | 11.46 |
| | Zoning MNY 17 | Sealstown Road, Cottonmount | 2.10 |
| | *Metropolitan Newtownabbey Sub-Total* | | *260.75* |
| | **Ballyclare** | | |
| | Zoning BE 06 | Avondale Drive, Ballyclare | 11.49 |
| | Zoning BE 07 | Mill Road, Ballyclare | 2.63 |
| | Zoning BE 08 | Templepatrick Road, Ballyclare | 5.24 |
| | Zoning BE 09 | Ballynure Road, Ballyclare | 0.31 |
| | *Ballyclare Sub-Total* | | *19.67* |
| | *Sub-Total* | | *280.42* |
| ***Total*** | | | **366.42** |

*Source: Antrim Area Plan 1984 – 2001*
*Belfast Metropolitan Area Plan 2015*

2.63 Over 248 hectares of land has been identified for future employment use throughout the Borough with 83 hectares located in Antrim and Randalstown, and a further 165 hectares in Metropolitan Newtownabbey and Ballyclare. This includes 91 hectares at Global Point, a designated 'major employment location', 53 hectares at two 'key local employment sites' located to the north and south of the Antrim Road, Mallusk.

2.64 With regard to Ballyclare, the Belfast Metropolitan Area Plan allocates 5 hectares of land at Hillhead Road as an employment site. Zonings BE 10 and BE 11 (sites to the east and west of the Hillhead Road) are identified for mixed use, where a minimum of 30% of each site should be developed for Class B2 (light industrial) use. Table 2.10 details sites zoned for future employment/industry use in the Borough.

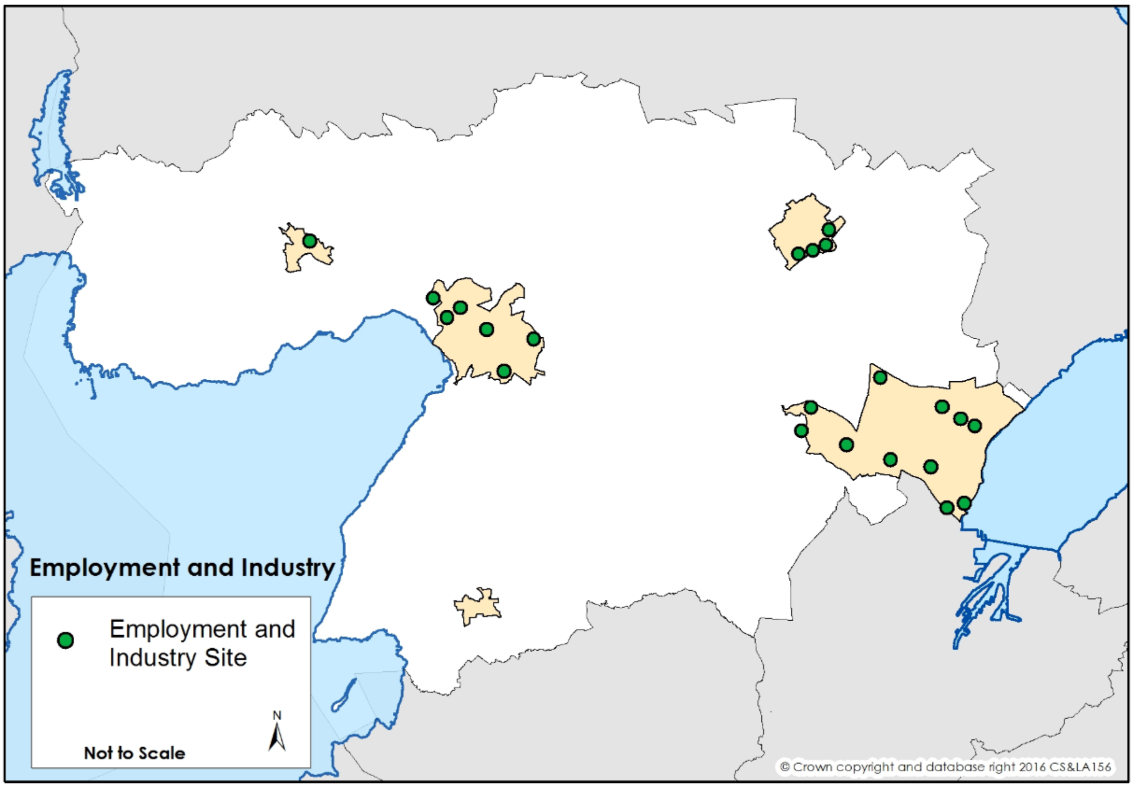
**Table 2.10: Lands Zoned for Future Employment/Industry Use in Antrim and Newtownabbey Borough Council**

<table>
<tr><th>Area Plan</th><th>Reference</th><th>Location</th><th>Site Area (ha)</th></tr>
<tr><td rowspan="15">Antrim Area Plan 1984 – 2001 & Alteration No. 3 (Industry – Antrim Town)</td><td colspan="3">Antrim Town</td></tr>
<tr><td>Zoning 16.5/1</td><td>Newpark Industrial Estate</td><td rowspan="8">69.00</td></tr>
<tr><td>Zoning 16.5/2</td><td>Steeple Bridge Industrial Estate (North)</td></tr>
<tr><td>Zoning 16.5/3</td><td>Steeple Bridge Industrial Estate (South)</td></tr>
<tr><td>Zoning 16.5/4</td><td>Steeple Bridge Industrial Estate (West)</td></tr>
<tr><td>Zoning 16.5/5</td><td>New Lodge Road (Newpark)</td></tr>
<tr><td>Zoning 16.5/6</td><td>Rathenraw Industrial Estate</td></tr>
<tr><td>Zoning 16.5/7</td><td>Muckamore (Antrim Technology Park)</td></tr>
<tr><td>Zoning 16.5/8</td><td>Springfarm Industrial Estate</td></tr>
<tr><td>Designation 4.0 (Alt. No. 3)</td><td>South of Kilbegs Road and east of Plaskets Burn</td><td>13.50</td></tr>
<tr><td>Sub-Total</td><td></td><td>82.50</td></tr>
<tr><td colspan="3">Randalstown</td></tr>
<tr><td>Zoning 17.6/1</td><td>Magheralane Road, Randalstown</td><td>0.80</td></tr>
<tr><td>Sub-Total</td><td></td><td>0.80</td></tr>
<tr><td colspan="3"></td></tr>
<tr><td rowspan="11">Belfast Metropolitan Area Plan 2015</td><td colspan="3">Metropolitan Newtownabbey</td></tr>
<tr><td>Zoning MNY 05</td><td>Global Point/Ballyhenry (Major Employment Location)</td><td>91.00</td></tr>
<tr><td>Zoning MNY 06</td><td>North of Antrim Road, Mallusk (Key Local Employment Site)</td><td>20.00</td></tr>
<tr><td>Zoning MNY 07</td><td>South of Antrim Road, Mallusk (Key Local Employment Site)</td><td>33.00</td></tr>
<tr><td>Sub-Total</td><td></td><td>144.00</td></tr>
<tr><td colspan="3">Ballyclare</td></tr>
<tr><td>Zoning BE 05</td><td>Hillhead Road, Ballyclare (Employment Site)</td><td>5.00</td></tr>
<tr><td>Zoning BE 10</td><td>East of Hillhead Road, Ballyclare (Mixed Use Site)†</td><td>12.00</td></tr>
<tr><td>Zoning BE 11</td><td>West of Hillhead Road, Ballyclare (Mixed Use Site)†</td><td>4.00</td></tr>
<tr><td>Sub-Total</td><td></td><td>21.00</td></tr>
<tr><td colspan="3"></td></tr>
<tr><td colspan="3">Total</td><td>248.30</td></tr>
</table>

*† Site is subject to a requirement for a minimum of 30% light industrial use*
*Source: Antrim Area Plan 1984 – 2001& Alteration No. 3 (Industry – Antrim Town)*
*Belfast Metropolitan Area Plan 2015*

2.65 The Antrim Area Plan and Belfast Metropolitan Area Plan identify existing lands for employment/industry use and for future employment/industry use throughout the Borough. Figure 2.10 outlines these areas, however, it is acknowledged that there are significant areas of land that have been established for employment and industry uses through the development management process. In preparing the new Local Development Plan for the Borough, consideration will be given to any additional employment/industry lands identified throughout the consultation process.

**Figure 2.10: Employment & Industry Lands in Antrim & Newtownabbey**




Source: Antrim Area Plan 1984-2001
Belfast Metropolitan Area Plan 2015

**Remaining Employment/Industry Lands**

2.66 In preparing a new Local Development Plan for the Borough, it will be necessary to consider the quantum of zoned land which remains undeveloped in the context of employment and industry zonings. Table 2.11 provides an estimate for this purpose.

**Table 2.11: Remaining Employment/Industry Lands in ANBC**

| Area Plan | Reference | Location | Zoned Area (ha) | Area Developed (ha) | Area Remaining (ha) |
|---|---|---|---|---|---|
| Antrim Area Plan 1984 – 2001 & Alteration No. 3 (Industry – Antrim Town) | **Antrim Town** | | | | |
| | Zoning 16.5/1 | Newpark Industrial Estate | 69.00 | 59.94 | 0.30 |
| | Zoning 16.5/2 | Steeple Bridge Industrial Estate (North) | | | 0.00 |
| | Zoning 16.5/3 | Steeple Bridge Industrial Estate (South) | | | 0.00 |
| | Zoning 16.5/4 | Steeple Bridge Industrial Estate (West) | | | 0.00 |
| | Zoning 16.5/5 | New Lodge Road (Newpark) | | | 2.00 |
| | Zoning 16.5/6 | Rathenraw Industrial Estate | | | 3.00 |
| | Zoning 16.5/7 | Muckamore (Antrim Technology Park) | | | 3.76 |
| | Zoning 16.5/8 | Springfarm Industrial Estate | | | 0.00 |
| | Designation 4.0 (Alt. No. 3) | South of Kilbegs Road and east of Plaskets Burn | 13.50 | 10.00 | 3.50 |
| | *Sub-Total* | | *82.50* | *69.64* | *12.56* |
| | **Randalstown** | | | | |
| | Zoning 17.6/1 | Magheralane Road, Randalstown | 0.80 | 0.10 | 0.70 |
| | *Sub-Total* | | *0.80* | *0.10* | *0.70* |
| Belfast Metropolitan Area Plan 2015 | **Metropolitan Newtownabbey** | | | | |
| | Zoning MNY 05 | Global Point/Ballyhenry (Major Employment Location) | 91.00 | 4.00 | 87.00 |
| | Zoning MNY 06 | North of Antrim Road, Mallusk (Key Local Employment Site) | 20.00 | 3.00 | 17.00 |
| | Zoning MNY 07 | South of Antrim Road, Mallusk (Key Local Employment Site) | 33.00 | 12.00 | 21.00 |
| | *Sub-Total* | | *144.00* | *19.00* | *125.00* |
| | **Ballyclare** | | | | |
| | Zoning BE 05 | Hillhead Road, Ballyclare (Employment Site) | 5.00 | 0.00 | 5.00 |
| | Zoning BE 10 | East of Hillhead Road, Ballyclare (Mixed Use Site)† | 12.00 | 0.00 | 12.00 |
| | Zoning BE 11 | West of Hillhead Road, Ballyclare (Mixed Use Site) | 4.00 | 4.00 | 0.00 |
| | *Sub-Total* | | *21.00* | *4.00* | *17.00* |
| ***Total*** | | | ***248.30*** | ***93.04*** | ***155.26*** |

*† Unimplemented approval on site for mixed-use development comprising 70% Residential and 30% Employment/Industry*

*Source: Planning Section Research*

2.67 Initial research carried out by the Planning Section has identified that, of the 248 hectares of land zoned in the current Local Development Plans, some 61% (155 hectares) remains undeveloped. The majority of this remaining land is zoned within the Belfast Metropolitan Area Plan, and is therefore concentrated in Metropolitan Newtownabbey and Ballyclare.

2.68 Of the 83 hectares of land zoned for employment and industry use in Antrim and Randalstown, approximately 84% has been developed, with only 12.6 hectares remaining for future development. It is acknowledged however that these remaining lands exist in relatively small parcels of undeveloped land throughout Antrim and Randalstown.

2.69 In Metropolitan Newtownabbey, 144 hectares of land were zoned for employment and industry uses. It is currently estimated that approximately 125 hectares have yet to be developed, suggesting that over 86% remains available for future development.

2.70 With regard to Ballyclare, just less than 21 hectares of land was zoned for employment and industry purposes. This includes the two mixed-use sites adjacent to the Hillhead Road (BE 10 & BE 11). Almost 81% of zoned employment and industry lands are still undeveloped; however, whilst one of these mixed-use sites has been developed, the remaining zoning is currently subject to an extant planning approval which would, if implemented, reduce the available lands to 5 hectares (24% of the total zoned lands in Ballyclare).

**Unzoned Land**

2.71 The Antrim Area Plan and the Belfast Metropolitan Area Plan acknowledge that development proposals for employment and industry at locations within settlement development limits, which are not zoned for any particular use, will be considered in accordance with prevailing regional planning policy and with regard to other material planning considerations.

**Belfast International Airport & Nutt's Corner**

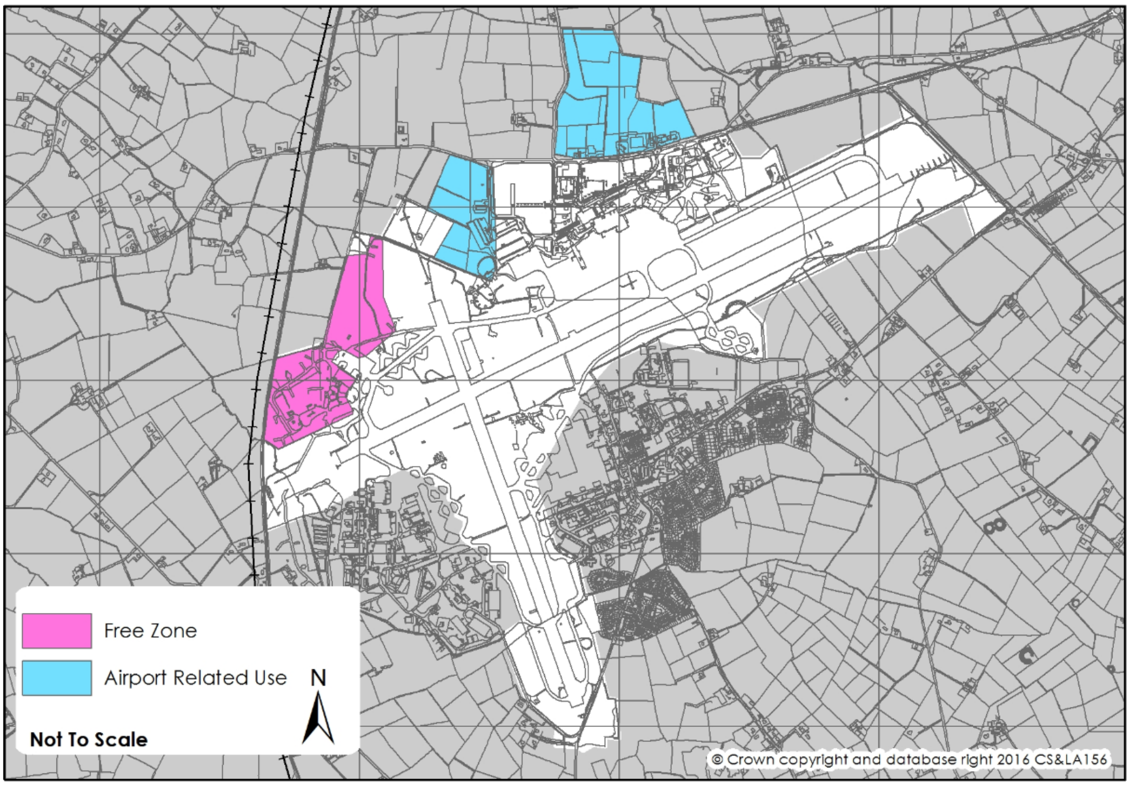
2.72 Northern Ireland's largest transportation and storage hub is based around Belfast International Airport and the surrounding area. BIA is one of the most important regional airfreight centres in the United Kingdom – due to the relative isolation of Northern Ireland from mainland UK and Europe. The provision of superior airfreight services is critical in order to ensure that local businesses can access domestic and international markets. Belfast International Airport advises that 40,000 tonnes of air cargo were handled at the airport in 2013. More recently, the Civil Aviation Authority confirms that in March 2016, almost 3,900 tonnes of cargo were processed at Belfast International Airport – comprising 2,665 tonnes of airfreight and 1,233 tonnes of mail freight.

2.73 The Antrim Area Plan identifies 29 hectares of land to the west and north of the main runway at BIA for development as a Free Zone – an enclosed area attached to an airport (or seaport), treated for customs duty purposes as if it was outside the territory of its host country, thus waiving the requirement for payment of customs duty, VAT, or other importation tariffs. Warehousing and industry uses were envisaged in the Plan for this area, and it appears that no development has, as yet, taken place. Whilst the concept of a free zone may no longer be considered relevant in today's economic climate, the Development Plan zoning may still bear relevance with regard to future employment and industry uses – particularly those associated with airport related uses.

2.74 In addition, approximately 33 hectares of land are zoned for airport related uses. These comprise of 20 hectares to the north and west of the existing vehicular access to the airport, and a further 13 hectares zoned to the south of British Road and west of the existing airport perimeter. Development has since occurred at these locations, with car hire and car parking (permanent and seasonal) facilities based to the north of the airport terminal, and cargo and airport service buildings having been erected to the south of British Road. Of the 33 hectares zoned for airport related uses, approximately 7.8 hectares (23.6%) have been developed permanently whilst a further 2.6 hectares are currently used by BIA for their seasonal 'Park and Fly' facility.

2.75 Figure 2.11 outlines current Development Plan zonings with regard to Belfast International Airport, including lands zoned for 'airport related uses' and the 'free zone'.

**Figure 2.11: Belfast International Airport Land Use Zonings**




*Source: Antrim Area Plan 1984-2001*

2.76 Whilst not zoned for any particular use, land at Nutt's Corner has also been developed for employment and industry use. A Regional Headquarters and Distribution Centre has been constructed by the retailer Lidl at a site adjacent to Nutt's Corner and the Dundrod Road – a development which in itself highlights the strategic location of the Borough. In addition, CLAAS/Erwin Agri-Care now operates a 2,000 square metre agricultural showroom and service workshop on the Nutt's Corner Road. Other operations currently ongoing in the vicinity of Nutt's Corner include those by Solmatix Renewables and Conveyortek.

**Planning for Employment and Industry in the Future**

2.77 The Council, together with Antrim Enterprise Agency and Mallusk Enterprise Park, has appointed Public and Corporate Economic Consultants (PACEC) to carry out market research and an economic appraisal for additional workspace accommodation throughout the Borough.

2.78 As part of this project, it is envisaged that an overview of the Borough's economy will be provided allowing the identification of future economic trends through comparison with other Northern Ireland and UK regions. Furthermore, whilst the research specifically relates to the identification of workspace accommodation throughout the Borough, it will outline a detailed understanding of the current land/accommodation available within Antrim and Newtownabbey and assess suitability with regard to the needs of local businesses. The findings from this research will therefore provide evidence for the Local Development Plan with regard to economic development and therein the issue of employment and industry.

2.79 The previous section has clearly outlined that whilst over 61% of the Borough's zoned employment and industry lands remain available for development, there is an imbalance in favour of Metropolitan Newtownabbey – predominantly due to the more recent adoption of the Belfast Metropolitan Area Plan. Whilst the identification of specific sites will not be considered until the Local Policies Plan stage, the Local Development Plan will be required to consider the need for additional sites for employment and industry uses throughout the Borough, particularly at easily accessible locations, and where there is a defined need.

2.80 In order to Plan for the future development of employment and industry in the Borough, it will be necessary to assess the Borough's existing zonings and remaining availability alongside economic trends, the requirements of potential investors and how sites can be connected to existing transportation infrastructure in order to improve sustainability and accessibility. This process will be carried out in accordance with the Regional Development Strategy's Employment Land Evaluation Framework as outlined earlier in this paper.

**Key Findings**

2.81 The evidence presented in this section has led to the identification of the following key findings:

- The SPPS requires that Local Development Plans must take account of the regional strategic objectives for facilitating economic development, which including:
    - o The promotion of sustainable economic development in an environmentally sensitive manner;
    - o Tackling disadvantageand facilitating job creation by ensuring the provision of a generous supply of land suitable for economic development;
    - o Sustaining a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
    - o Supporting the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
    - o Promoting mixed-use development and improve integration between transport, economic development and other land uses; and
    - o Ensuring a high standard of quality and design for new economic development.
- The tertiary (service) sector dominates the local employment market in terms of jobs and the number of VAT/PAYE registered businesses. Within this sector, the Borough possesses Northern Ireland's largest share of employment in health and social care.
- There are apparent relationships, in the context of the labour market, between the Borough and neighbouring council areas – particularly Belfast City, Mid & East Antrim, and Lisburn & Castlereagh City, to where many of our residents commute, and from where many of the Borough's workforce travel.
- Belfast International Airport is one of Northern Ireland's largest transportation and storage hubs, providing approximately 5,000 jobs within the Borough. In addition, BIA is an important regional airfreight centre that addresses the relative isolation of Northern Ireland from Mainland UK and Europe, thus providing critical access for local businesses to domestic and international markets.
- Whilst the Borough's population, economic activity and employment rates continue to increase, and unemployment and claimant count rates fall, the working age population is declining. Based upon current projections, the number of residents at working age will fall by 3.1% between 2014 and 2030; potentially resulting in a decline in the number of residents in employment at the end of the Plan period should current employment rates remain constant.

- 366 hectares of land within the Borough are identified (in current Development Plans) as areas of existing employment and industry, whilst a further 248.30 hectares are identified as areas for future employment and industry use.
- It is estimated that approximately 155 hectares of land identified for future employment and industry use remain available for development. Of this area, some 91.5% is located within Metropolitan Newtownabbey and Ballyclare, with the residual 8.5% located in Antrim Town and Randalstown. This indicates a potential imbalance with regard to employment and industry lands throughout the Borough, based on existing Development Plan zonings.

**Next Steps**

2.82 In order to plan for the future of economic development in the Borough, with particular regard to formal areas of employment and industry, the Local Development Plan is required to consider the suitability of remaining lands identified for employment and industry use, but also to identify potential new sites throughout the Borough, and to carry out an assessment in accordance with the Regional Development Strategy and the Strategic Planning Policy.

2.83 There will also be a requirement to continue the collection, collation and assessment of relevant evidence to inform this aspect of the new Local Development Plan for the Borough.

# 3 Retail

3.1 This section relates to the topic of retail, and identifies, collates, and discusses evidence comprising:

- Regional Policy Context;
- Existing Development Plans and Operational Planning Policy;
- Other relevant Strategies/Legislation;
- Retail Profile of the Borough;
- Retail Trends;
- Key Findings; and
- Next Steps.

3.2 In general terms, retailing encompasses those land uses relating to purposes outlined in Class A1: Shops within Part A of the Schedule to the Planning (Use Classes) Order (Northern Ireland) 2015. It relates primarily to the sale and display of goods (other than hot food) to visiting members of the public.

3.3 Retail can be broken down into two distinct areas, namely convenience and comparison. Convenience retail relates to the sale of food, drinks, tobacco, newspapers, magazines, cleaning products and toiletries. Comparison retailing involves the sale of clothes, shoes, electrical goods, furniture, carpets, etc. However, comparison retailing is further subdivided into bulky and non-bulky categories. Bulky comparison relates to electrical goods, DIY goods, furniture and carpet, whereas non-bulky includes clothes and shoes.

**Regional Policy Context**

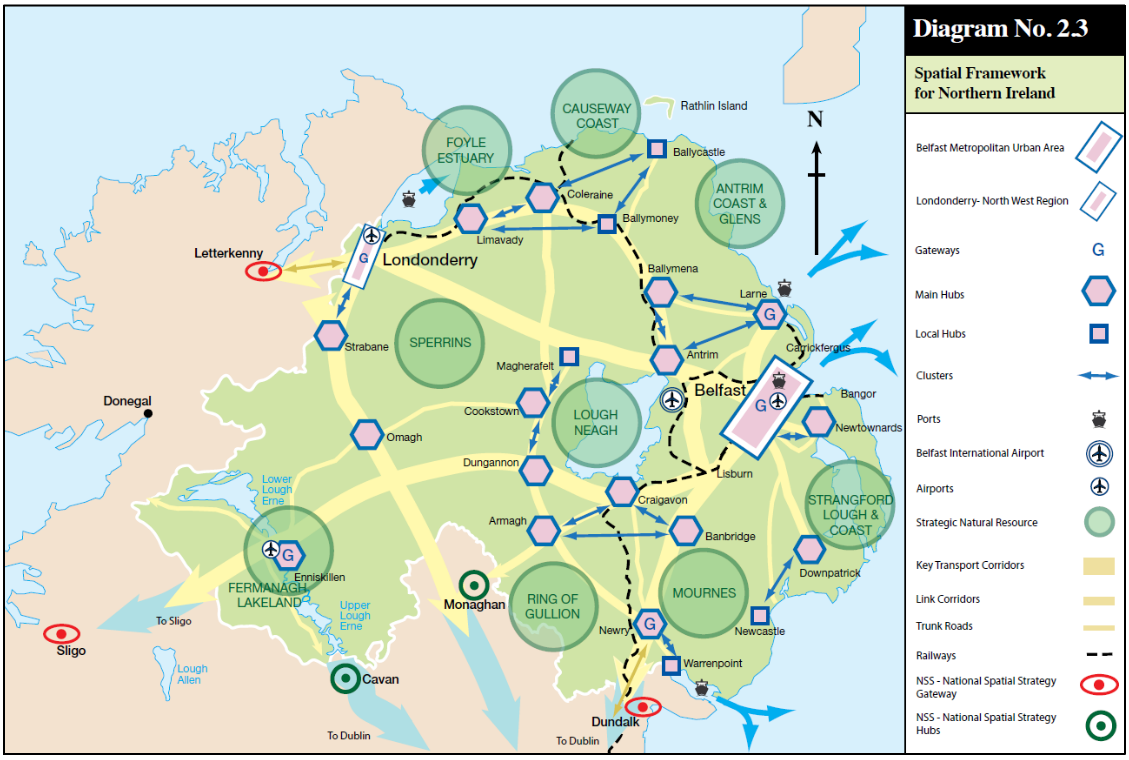
**Everyone's Involved - Sustainable Development Strategy**

3.4 Whilst none of the six Priority Areas for Action outlined in the SDS relate specifically to this topic, it is clear that retail has a role to play in the building of a dynamic economy, and the strengthening of society – particularly with regard to creating a positive perception of communities through vibrancy and vitality.

**The Regional Development Strategy (RDS) 2035 – Building a Better Future**

3.5 The RDS defines the Spatial Framework for Northern Ireland (Figure 3.1), which identifies the Belfast Metropolitan Area, hubs and clusters of hubs, air and sea ports, and the Key Transport Corridors and other networks which provide a connection between them.

**Figure 3.1: Spatial Framework for Northern Ireland**




*Source: Regional Development Strategy 2035, Department for Regional Development, 2010*

3.6 The RDS recognises the role of the Belfast Metropolitan Urban Area (BMUA), particularly Belfast City Centre, with regard to retail provision, alongside that of services, administration, culture and education. It also acknowledges the potential for growth in the retail sector in Lisburn, Bangor and Carrickfergus. Outside the BMUA, the RDS identifies Antrim as a 'main hub' due to its excellent healthcare provision and expanding retail offer. The town's linkage to the transportation network reinforces the strength of Antrim in providing easy access to and from all parts of the Province.

3.7 Whilst there are no Regional Guidance (RG) or Spatial Framework Guidance (SFG) policies within the RDS that relate specifically to retailing, Policy RG7 does recognise the importance of accessible, vibrant city and town centres that offer more local choice for shopping, social activity and recreation.

### Strategic Planning Policy Statement for Northern Ireland (SPPS)

3.8 The SPPS acknowledges the importance of planning in supporting the role of town[1] centres and contributing to their success. It seeks to encourage development at an appropriate scale in order to enhance the attractiveness of town centres and helping to reduce the need to travel.

[1] Includes both city and town centres.

3.9 The aim of the SPPS is to support and sustain vibrant town centres across Northern Ireland through the promotion of established town centres as the appropriate first choice location for retailing and other complementary functions, consistent with the Regional Development Strategy.

3.10 The six regional strategic objectives for town centres and retailing are to:

- secure a town centres first approach for the location of future retailing and other main town centre uses[2];
- adopt a sequential approach to the identification of retail and main town centre uses in Local Development Plans and when decision-taking;
- ensure LDPs and decisions are informed by robust and up-to-date evidence in relation to need and capacity;
- protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community facilities, housing and business;
- promote high quality design to ensure that town centres provide sustainable, attractive, accessible and safe environments; and
- maintain and improve accessibility to and within the town centre.

3.11 In preparing Local Development Plans, an assessment must be undertaken by councils with regard to the need or capacity for retailing across respective Plan areas. Of vital importance to this assessment is the completion (and regular review) of town centre health checks. These will assist in the development of an evidence base for the LDP, and will contain information on a variety of indicators, including:

- existing town centre uses, including resident population;
- vacancy rates;
- physical structure and environmental quality;
- footfall;
- retailer representation;
- attitudes and perceptions;
- prime rental values; and
- commercial yields.

3.12 The SPPS advises that existing district and local centres should be retained and consolidated and ensure that the role of these centres is complementary to that of town centre in the Plan area. Furthermore, LDPs should define a hierarchy of centres (town, district, local centres, etc.), and that the role and function of rural centres is acknowledged.

3.13 A strategic level review of operational planning policy is examined further in the Policy Review Evidence Paper.

[2] Includes cultural and community facilities, retail, leisure, entertainment and businesses.

**Town Centres and Retailing Research Project (GL Hearn Report)**

3.14 In order to inform the then forthcoming SPPS, a report was compiled by GL Hearn on behalf of the Department of the Environment, with the main objective of researching issues relevant to town centres and retailing. Published in January 2014, the report incorporated health checks for existing city and town centres, together with an assessment of town centre and retail trends.

3.15 Whilst these assessments were based upon town centre boundaries as designated in adopted Area Plans, with specific regard to the Borough, only Antrim was identified as a town centre. The report does not advise rationale for the omission of both Crumlin and Randalstown from the research despite their designation as town centres in the Antrim Area Plan.

3.16 According to this research, Antrim is considered to have one of the smallest town centres in Northern Ireland with a gross floorspace of 32,680 square metres. Together with many other town centres, Antrim falls far short of the Northern Ireland average of 80,170sqm. The research suggests that many of the smaller centres are traditional high street-style market town centres that have not experienced modern major redevelopment to provide purpose built, high quality shopping centres.

3.17 In general, the diversity of uses in Northern Ireland's town centres is considered to be similar with the rest of the United Kingdom. Town centre uses are dominated by retailing and the provision of services. Approximately 42% of floorspace within town centres are utilised for retailing, with 35% dedicated to the sale of comparison goods, and 7% to convenience sales. Convenience retail offer throughout town centres in NI is contained within a small number of larger units – indicative of the wider UK trend confirming the dominance of larger supermarkets in meeting convenience shopping needs. With regard to other town centre uses (including transport services, employment and commercial activities, religious buildings, and wholesale trade), the report notes that the proportion in Northern Ireland is generally higher than in the rest of the UK. This is considered to be an encouraging quality, as this endorses the performance of town centres as hubs for a range of activities that attract people into town centres and contribute to vitality and viability.

3.18 The research advises that at the time of publication, Antrim had vacancy rates of 15% (based upon unit numbers) and 17% (based on floorspace). In both cases, Antrim's vacancy rates were considerably higher than the then UK National Averages of 12% and 10% respectively.

3.19 The study summarises that many of our towns are characterised by edge-of-centre and out-of-town centre food stores and retail parks. This observation is of particular relevance in the context of Tesco and Junction One in Antrim, Lidl in Ballyclare, and various local convenience retailers throughout the

Newtownabbey area. Whilst designated as District Centres, the Abbey Centre (and surrounding retail parks) and Northcott Shopping Centre could be considered as out-of-town centre retailing. However, the Newtownabbey area is unique in that it has no defined town centre. The quality and amount of out-of-centre retail provision throughout Northern Ireland, together with accessibility and free car parking ensures that they remain attractive to consumers.

3.20 With particular regard to out-of-town centre retailing in the Borough, the GL Hearn report comments that:

- Abbey Centre plays a dominant role over the traditional town centre, including service functions, and is augmented by an agglomeration of other bulky goods retail units;
- Junction One comprises an outlet centre with a range of national multiple 'outlet' and 'factory' format stores together with an Asda superstore, retail warehousing and leisure including a multiplex cinema.

3.21 A number of town centre specific issues are highlighted in the GL Hearn report. These are summarised in Table 3.1. These issues suggest that it would be appropriate to have a stronger policy stance on protecting and enhancing town centres – a stance which is now embraced by the SPPS.

**Table 3.1: Town Centre Issues**

| Strengths/Opportunities | Weaknesses/Threats |
|---|---|
| • Diversity of existing town centres.<br>• Strong local independent retail offer.<br>• Good quality physical environment<br>• Town centre parking, particularly short stay 'on street' parking<br>• Town centre parking, particularly short stay 'on street' parking<br>• Employment uses within town centres<br>• Good accessibility and public transport hubs | • Vacancies and potential obsolescence of some floorspace.<br>• Low and falling retail rents.<br>• Amount and profile of out of centre retailing.<br>• Limited private sector town centre development/investment.<br>• Heavy traffic flows and congestion leads to conflict with shoppers. |

*Source: Town Centres and Retailing Research Project, Department of the Environment*

### Existing Development Plans and Operational Planning Policy

3.22 The Antrim Area Plan and the Belfast Metropolitan Area Plan provide details of a settlement hierarchy and a hierarchy of settlements with relevance to the Borough and in the context of retailing. This includes the identification of town centres and central areas, town cores and primary retail cores, local centres and district centres. This information is presented and considered in greater detail later in this evidence paper.

3.23 Until the publication of the Strategic Planning Policy Statement in September 2015, Planning Policy Statement 5: Retailing and Town Centres constituted operational planning policy with regard to retail provision throughout Northern

Ireland. The SPPS now provides subject policies with regard to town centres and retailing. These policies must be taken into account throughout the preparation of new Local Development Plans, and are also material to all decisions with regard to individual planning applications and planning appeals. The provisions and requirements of the SPPS were considered earlier in this paper.

**Other Relevant Strategies/Legislation**

3.24 This Antrim Town Centre Masterplan and Delivery Strategy, prepared by GVA Grimley on behalf of the Department for Social Development (DSD) in May 2010, addresses issues and opportunities facing Antrim Town Centre and seeks to identify a range of potential options and a preferred approach to meet the regeneration objectives for the town centre.

3.25 The primary aim of the Masterplan was to guide the delivery of an appropriately scaled, high quality retail led scheme to raise the profile of Antrim and to significantly improve upon its retail offer. Together with its Delivery Strategy, the Masterplan intended to act as a catalyst for the regeneration of Antrim Town Centre.

3.26 The Study draws out some interesting points with regard to patterns of retail in Antrim. With regard to convenience retail, the report suggests that the town retains 83% of its main food expenditure, of which 82% was claimed by Tesco in Antrim. It highlights that trade is drawn from Glenavy and Ballyclare. However, this landscape may have changed since the Masterplans publication as Asda has since commenced trading at Junction One, and in Ballyclare, whilst Tesco has now opened a store in Crumlin.

3.27 Antrim performs poorly with regard to comparison retailing – retaining only 21% of non-bulky comparison expenditure and less than 16% of bulky comparison expenditure within the catchment. It is likely that the comparison retail offer at Junction One may have a contributing factor; however, the significant amount and quality of comparison offer in Ballymena, together with its proximity to and accessibility from Antrim are likely to have a greater role.

3.28 The Masterplan presents 2 potential opportunity sites within Antrim Town Centre for retail-led development. These are:

- Land to the rear of Castle Mall (Central Car Park);
- Land at Church Street/Railway Street (Ulster Bar Corner); and

3.29 The opportunity site at Castleway (Railway Street Car Park) that was initially identified in the report was earmarked for retention as car parking provision.

### Retail Profile of the Borough
### Retail Hierarchy

3.30 Retail provision in the Borough is distributed throughout the current hierarchy of centres in the form of primary retail cores, town, district and local centres. Furthermore, retailing is also located at edge of centre sites, and out of centre locations. In the context of retailing, the SPPS defines edge of centre as a location within 300 metres from a city or town centre boundary. Out of centre sites are those that are located in excess of 300 metres of a city or town centre boundary.

3.31 Current Development Plans provide designations with regard to primary retail cores, and town, district and local centres. The Borough's retail hierarchy currently consists of:

- 1 Primary Retail Core;
- 4 Town Centres;
- 2 District Centres; and
- 1 Local Centre.

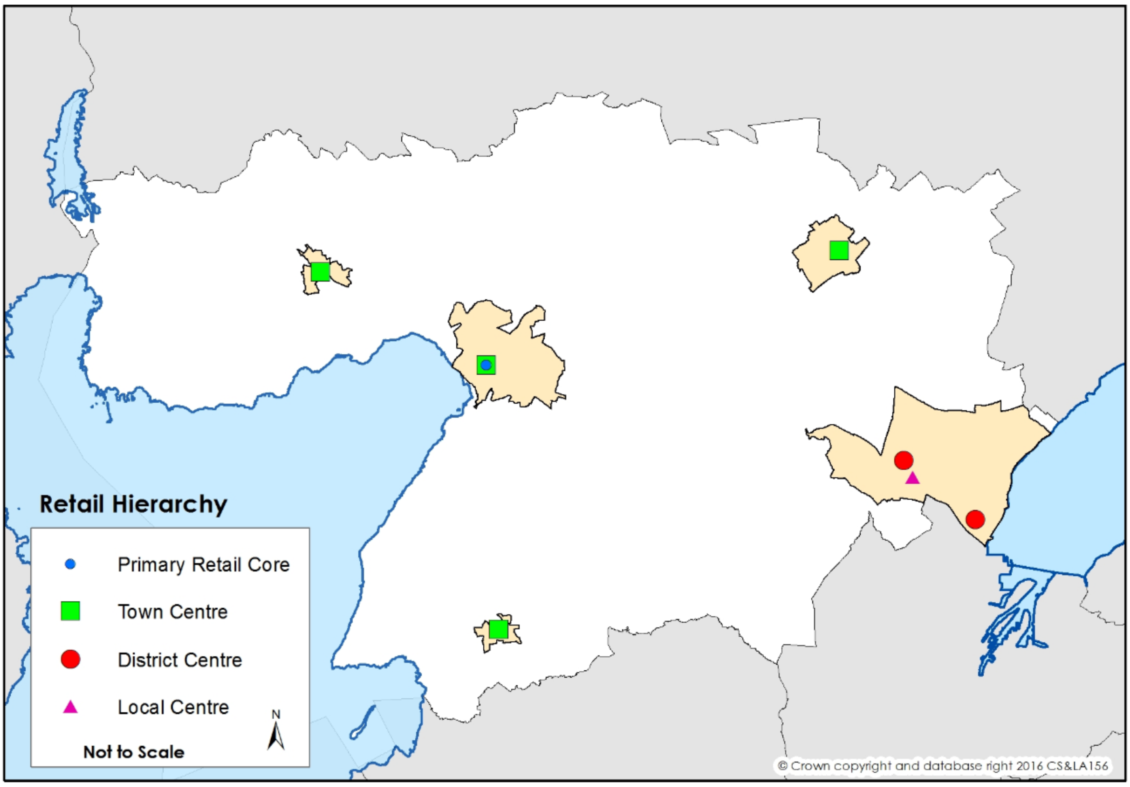
**Table 3.2: Existing Retail Hierarchy in Antrim & Newtownabbey**

| **Antrim Area Plan 1984 – 2001** | |
|---|---|
| **Reference** | **Description** |
| 16.10 | Antrim Central Area (Town Centre) |
| 16.11 | Antrim Town Core (Primary Retail Core) |
| 18.7 | Crumlin Town Centre |
| 17.9 | Randalstown Town Centre |
| | |
| **Belfast Metropolitan Area Plan 2015** | |
| **Reference** | **Description** |
| BE 19 | Ballyclare Town Centre |
| MNY 20/01 | Abbey Centre District Centre |
| MNY 20/02 | Northcott District Centre |
| MNY 21 | Glengormley Local Centre |

Source: Antrim Area Plan 1984 – 2001
Belfast Metropolitan Area Plan 2015

3.32 Figure 3.2 illustrates the Borough's current retail hierarchy as identified in the existing Development Plans.

**Figure 3.2: Existing Retail Hierarchy in Antrim and Newtownabbey**




Source: Antrim Area Plan 1984 – 2001
Belfast Metropolitan Area Plan 2015

3.33 The SPPS defines edge of centre, in terms of retailing, as a location within 300 metres from a town centre boundary. Out of centre sites are those located beyond a distance of 300 metres from a town centre boundary.

3.34 The Borough's most prominent out-of-centre retail locations are those sited at Abbey Centre and Junction One, both of which provide a wide range of retail offer, leisure, and restaurant units. Anecdotal evidence suggests that, in the form of the Abbey Centre District Centre and surrounding retail offer, the Borough, possesses the largest concentration of comparison retail offer in Northern Ireland.

### Retail Provision in Antrim and Newtownabbey

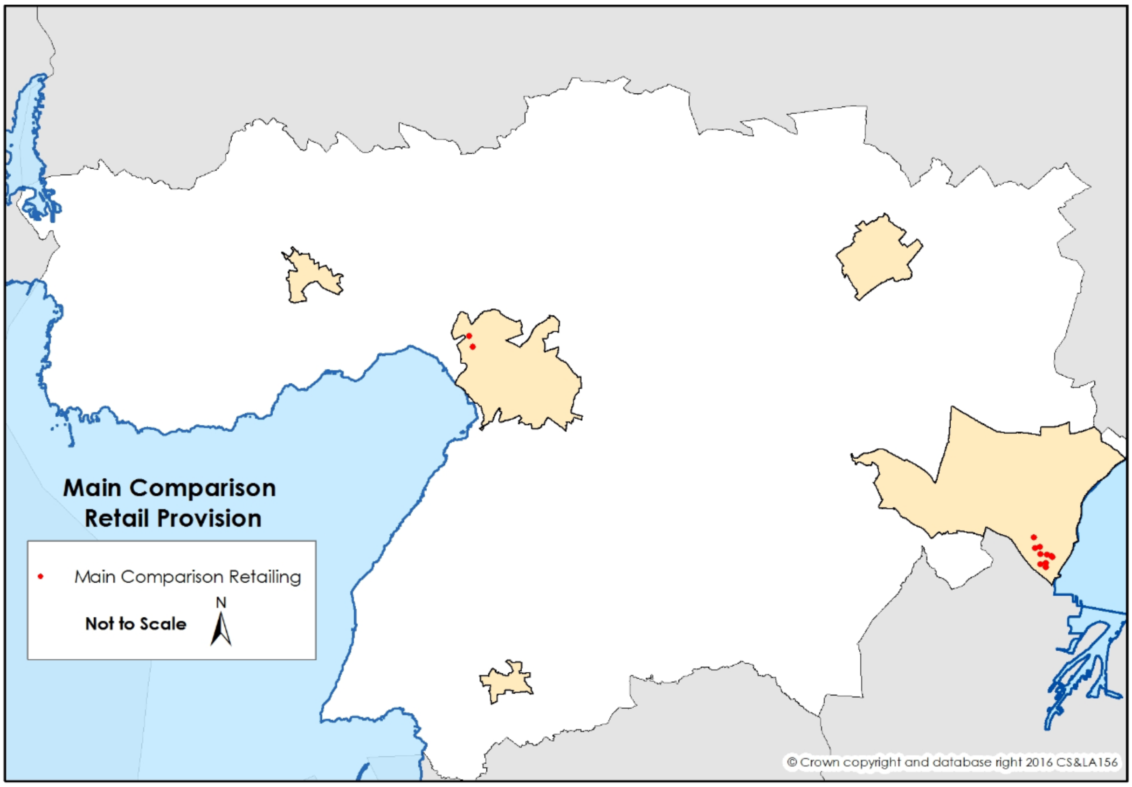
3.35 The Borough offers a wide and varied range of retail provision in terms of convenience and comparison shopping. However, comparison shopping dominates retailing throughout Antrim and Newtownabbey, which is primarily focussed on Abbey Centre District Centre and Junction One. Small scale independent style comparison retailing is generally a feature of our town and local centres, which complements the convenience retail provision, retail services, and other town centre uses.

3.36 Table 3.3 outlines the location of main comparison retail provision and retail warehouse parks throughout the Borough, alongside clarification with regard to where each location sits within the current retail hierarchy. Figure 3.3 offers a spatial presentation of this information in the context of the Borough as a whole.

**Table 3.3: Main Comparison Retail Provision in ANBC**

| Location | Retail Hierarchy |
|---|---|
| Abbey Centre Shopping Centre, Newtownabbey | District Centre |
| Abbey Retail Park, Church Road, Newtownabbey | District Centre |
| Abbey Trading Centre, Longwood Road, Newtownabbey | District Centre |
| Glenmount Road, Newtownabbey | District Centre |
| Junction One Outlet, Antrim | Out of Centre |
| Junction One Retail Park, Antrim | Out of Centre |
| Longwood Road Other, Newtownabbey | District Centre |
| Longwood Road Retail Park, Newtownabbey | District Centre |
| Mill Road, Newtownabbey | Edge of Centre |
| Starplan Retail Park, Longwood Road, Newtownabbey | District Centre |
| Shore Road Retail Park, Shore Road, Newtownabbey | Edge of Centre |
| Valley Retail Park, Church Road, Newtownabbey | Edge of Centre |

**Figure 3.3: Main Comparison Retailing in Antrim & Newtownabbey**



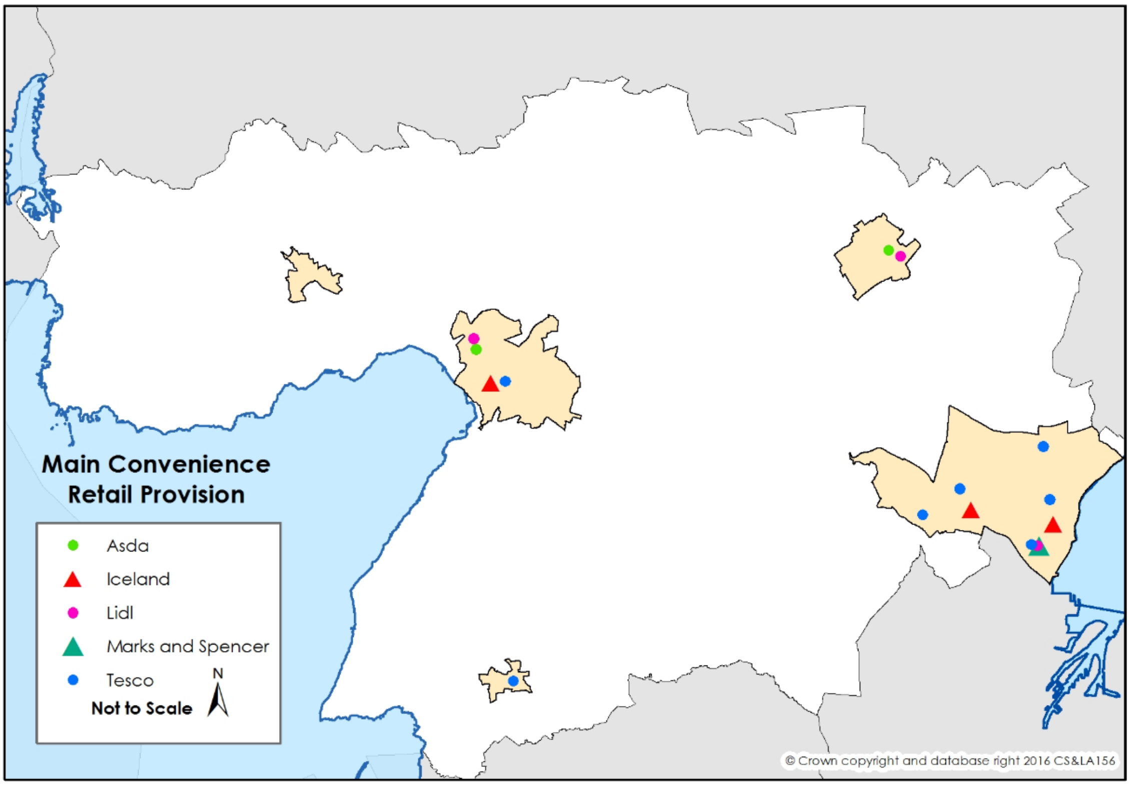

3.37 The Borough's town and local centres are often the location for day-to-day convenience retailing incorporating butchers, greengrocers, bakeries, newsagents, and smaller supermarkets, whilst larger standalone supermarkets and superstores are often sited outside these areas owing to the requirement to provide a significant amount of car parking.

3.38 The Borough's convenience retail market is dominated by two of the largest food retailers in the UK, namely Asda and Tesco. There are currently two Asda stores in the Borough – Ballyclare and Antrim (Junction One). Tesco operates from 7 locations in the Borough in a variety of formats – from largescale 'Extra' and 'Superstore' outlets which cater for the wider population, to 'Express' stores which generally provide a local neighbourhood convenience offer. Other prominent convenience retailers in the Borough include Iceland, Lidl, and Marks and Spencer. Including Asda and Tesco, these retailers account for 16 food stores at various locations in Metropolitan Newtownabbey, Antrim, Crumlin and Ballyclare. Table 3.4 provides details of the main convenience retailers, whilst Figure 3.4 locates these operators in the context of the Borough.

**Table 3.4: Main Convenience Retail Provision in ANBC**

| Operator | Location | Retail Hierarchy |
|---|---|---|
| Asda | Junction One, Antrim | Out of Centre |
| | Park Street, Ballyclare | Town Centre |
| Iceland | Doagh Road, Newtownabbey | Out of Centre |
| | Market Square, Antrim | Primary Retail Core & Town Centre |
| | Tramways Shopping Centre, Glengormley | Local Centre |
| Lidl | Junction One Retail Park, Antrim | Out of Centre |
| | Ballynure Road, Ballyclare | Edge of Centre |
| | Old Glenmount Road, Newtownabbey | District Centre |
| Marks & Spencer | Old Glenmount Road, Newtownabbey | District Centre |
| Tesco | Abbey Retail Park, Newtownabbey (Superstore) | District Centre |
| | Castle Way, Antrim (Extra) | Edge of Centre |
| | Doagh Road, Newtownabbey (Express Store) | Out of Centre |
| | Main Street, Crumlin(Superstore) | Edge of Centre |
| | Mayfield High Street, Glengormley (Express Store) | Out of Centre |
| | Monkstown Village Centre, Monkstown (Express Store) | Out of Centre |
| | Northcott Shopping Centre, Glengormley (Extra) | District Centre |

**Figure 3.4: Main Convenience Retailing in Antrim & Newtownabbey**




3.39 Whilst the convenience retail sector in the Borough is dominated by Asda and Tesco, a strong independent sector still remains. Smaller convenience retailers including Co-Op Food and other brand such as Spar/Eurospar, Centra, and Mace from the Henderson and Musgrave Groups provide a vital service to the community. These operators, in addition to independent retailers, are of particular importance in rural areas.

3.40 Summaries of the Borough's town, district and local centres (with regard to retail provision) are provided in the following paragraphs. An overview of the retail provision at out-of-centre locations is also detailed.

**Town, District and Local Centres**
**Antrim Town Centre**

3.41 Antrim is unique in terms settlement hierarchy in the Borough in that the town has a designated Primary Retail Core (Town Core) in addition to a town centre (Central Area). The Primary Retail Core (PRC) was designated in the Antrim Area Plan to act as a catalyst for the redevelopment and regeneration of that particular area.

3.42 Retail provision within Antrim Town Centre is focussed on the PRC which encompasses Market Square, High Street, Church Street, and Railway Street, and includes Castle Mall shopping centre. Castle Way forms a boundary to the north and east, whilst Dublin Road forms the western edge of the PRC.

3.43 With regard to convenience retailing within the town centre, existing offer consists of mainly small supermarkets and newsagents, bakeries and butcher's shops, off-licences and chemists/pharmacies. Iceland would be the most dominant convenience retailing located within the town centre. However, the Tesco store, located on the outside edge of the town centre is likely to dominate local convenience retailing in the Antrim, together with the ASDA store at Junction One.

3.44 Comparison shopping in the town centre consists primarily of small scale retailing shops, offering furniture, electrical goods, clothes, gifts, and jewellery.

3.45 Castle Mall offers primarily comparison retail provision through retailers such as New Look, Hurrells Electrical. However, it does offer convenience retailing through Holland and Barrett and Gordons Chemist, but also through the discount retailers Poundland and Poundstretcher.

3.46 Recent surveys of Antrim Town Centre, carried out by Council officials in July 2016, estimate the vacancy rate is approximately 19.9%. Castle Mall accounts for the majority of vacancies with 23 out of its 38 units being vacant – resulting in a vacancy rate of 60.5%. Between January 2016 and July 2016, the overall vacancy rate of the town centre declined from 21.5% to 19.9%. However, with regard to Castle Mall, the vacancy rate has increased from 57.9% to 60.5%

3.47 The next stage of Plan preparation will continue to monitor vacancy rates within Antrim Town Centre.

**Ballyclare Town Centre**

3.48 Retail provision in the town centre is focussed primarily on Main Street, The Square, North End, and the southern ends of the Rashee and Ballyeaston Roads.

3.49 With regard to convenience goods, there is a wide range of provision including butcher shops, greengrocers, newsagents, and chemist/pharmacies. In addition, a small supermarket is located on The Square, and a discount retailer sited on Main Street, both offering convenience goods. Convenience retail provision in the town centre is dominated by the ASDA superstore, which is located within the town centre boundary to the north of The Square, and accessible from the junction of North End and the Rashee and Ballyeaston Roads. Comparison provision is offered in a variety of clothes and footwear shops, electrical goods retailers, homewares and hardware, and florists shops. It is likely that with regard to clothes retailing in particular, Asda may have a dominant effect.

3.50 Unit vacancies appear to be more common towards the northern and southern ends of the town – in Main Street and the junction of North End and the Rashee/Ballyeaston Roads. There are numerous vacant or derelict sites within the town centre particularly at the lower end of Main Street from the former Asda store towards Ballynure Road.

3.51 Definitive figures in relation to vacancy rates are not currently available for Ballyclare Town Centre, however, these will be collected during the next stage of Plan preparation.

**Crumlin Town Centre**

3.52 Retail provision in Crumlin is focussed primarily along Main Street. Convenience provision exists in the form of small-scale local shops including convenience stores, newsagents, butchers, bakeries, chemists/pharmacies, and off-licences. It is apparent that the largest convenience stores within the town centre are Russells in Main Street and Eurospar (petrol filling station) on Mill Road. Comparison retailing within the town centre is limited, and consists mainly of gift shops, florists and charity shops.

3.53 The Tesco Superstore, which straddles the town centre boundary, and therefore considered to occupy an edge-of-centre location, is likely to capture the majority of trade from Crumlin and the surrounding area – with regard to both convenience and comparison retailing.

3.54 The level of retail vacancy within the town centre appears to be quite high, although definitive figures are not yet available. These details will be clarified in the next stage of Plan preparation.

**Randalstown Town Centre**

3.55 Retail provision in Randalstown is centred on Main Street and New Street. The town centre offers a significant amount of convenience retail consisting of local supermarkets, greengrocers, butchers, bakeries, and chemist shops/pharmacies. The largest convenience outlets in the town centre are Spar (Drummaul) and Mace on New Street, and Costcutter on Main Street. Comparison retailing is more limited, but the town does offer an electrical goods store, a hardware store, gift shops, and florists.

3.56 Randalstown town centre generally experiences low rates of vacancy. However, accurate figures are not currently available. This information will be collected during the next stage of Plan preparation.

**Abbey Centre District Centre**

3.57 The Abbey Centre District Centre encompasses the Abbey Centre Shopping Centre, nearby retail provision at Old Glenmount Road, and adjacent retail parks including Abbey Retail Park, Longwood Road Retail Park, Starplan Retail Park and Abbey Trading Centre.

3.58 The District Centre comprises an estimated 88,000 square metres of retail floorspace, of which approximately 30,000 square metres is contained within the Shopping Centre. The retail offer at this location is primarily comparison in nature; however, convenience retail provision does arise in the form of Tesco, Marks and Spencer, Lidl, and other discount retailers in Longwood Road Retail Park.

3.59 The vacant lands to the south east of Abbey Retail Park, to the north of Church Road (previously occupied by Budget DIY and Pet World) are subject to a planning approval which offers the potential for a comparison retail development providing approximately 8,900sqm of comparison retail floorspace within the District Centre. A second extant planning approval on the site located to the south east of the existing B&Q store (part of which is currently occupied by Karkraft) could also increase the comparison retail floorspace within the District Centre by a further 8,900sqm.

3.60 In general terms, vacant floorspace is limited to the row of retail warehouses adjacent to the Longwood Road, which were previously occupied by Laser, Poundstretcher and Gilpins. Abbey Centre recently announced that the shopping centre was fully let; however, the recent closure of BHS will have impacted upon this. However, detailed vacancy rates throughout the District Centre are not currently available. This information will be collected during the next stage of Plan preparation.

**Northcott District Centre**

3.61 The District Centre at Northcott is located less than half a mile to the north of Glengormley Local Centre. The District Centre currently consists of a Tesco Extra and associated café, Burger King food outlet, pharmacy/chemist, and a greetings card/gift shop. The associated petrol filling station is located outside the District Centre boundary.

3.62 The current centre provides an estimated 6,000 square metres of retail floorspace, however, the extant approval with regard to this location allows for a total floorspace in the region of 19,000 square metres. Therefore, a second phase of development, consisting primarily of comparison retail provision, may be implemented in the future.

**Glengormley Local Centre**

3.63 The Local Centre designation is focussed upon the Antrim Road in Glengormley and incorporates its junctions with the Carnmoney, Hightown and Ballyclare Roads. Primary convenience provision is located to the south of the Local Centre in the form of Iceland and the large Spar unit at Glenwell Filling Station. It is likely that main food shopping is catered for by Tesco at Northcott District Centre or Abbey Centre District Centre, and potentially even the ASDA store in Ballyclare Town Centre. With regard to comparison retailing, the offer within the Local Centre is somewhat limited.

3.64 Retail provision in Glengormley has reduced significantly in the past 30 years, being replaced by a variety of office uses, professional and financial services (insurance brokers, estate agents, etc.), and commercial leisure provision.

3.65 The level of vacancy within Glengormley Local Centre appears to be high for a centre of its size; however up-to-date rates are not currently available. This information will be collected during the next stage of Plan preparation.

**Retail Provision outside Designated Centres**
**Junction One Retail Outlet and Leisure Park, Antrim**

3.66 The Outlet at Junction One comprises almost 23,000 square metres of retail floorspace within a range of retail units and retail warehouses. It forms part of the wider retail and leisure park which incorporates a food superstore, additional retail outlets, DIY centre, cinema, hotel and a range of restaurants. The wider retail and leisure park offers in the region of 60,000 square metres of floorspace for a variety of uses.

3.67 The Outlet, with its significant range with regard to its convenience and comparison retail offer, has been recognised as having a detrimental effect upon Antrim Town Centre, as it draws vital trade away from the town centre.

**Valley Retail Park, Newtownabbey**

3.68 Located a short distance to the north west of Abbey Centre District Centre, Valley Retail Park offers approximately 10,500sqm of retail floorspace. The retail park consists of 5 retail warehouses which are occupied by Harveys/Bensons for Beds, Smyths Toys, Halfords, Harry Corry and Go Outdoors. Following recent leases to Smyths Toys and Go Outdoors, no vacant units remain within the retail park.

**Shore Road Retail Park, Newtownabbey**

3.69 Located on the outer edge to the west of the Abbey Centre District Centre, and consisting of approximately 3,800sqm of retail floorspace, Shore Road Retail Park is fully let and is currently occupied by PureGym (health and fitness) and Dunelm (homewares). An additional unit is presently under construction to the east of the existing retail park, and depending upon the approval being implemented, the retail floorspace at this location is likely to increase by between 490sqm and 929sqm.

**Mill Road, Newtownabbey**

3.70 Whilst not a retail park per sei, the retail provision at Mill Road consists of a single retail warehouse (approximately 2,500sqm) occupied by Toys R Us. The retail provision is located on the eastern edge of the Abbey Centre District Centre.

### Retail Trends

### Vacancy Rates

3.71 The National Retail Barometer, published by Colliers International, tracks rental movements and vacancies throughout the UK. The latest release (Autumn 2015) has identified a UK-wide trend whereby there has been a small and significant increase in rental values, but vacancy rates remaining high with an average rate of 14.7% (April 2015), and increase from 13% in April 2014. This trend is attributed to retailers opting to relocate into prime shopping areas at the expense of secondary retail frontages – a decision which has ensured stable or increasing rental values alongside increasing rates of vacancy. Despite highlighting vacancy rates as a major issue, the Barometer advises that as economic growth gains momentum, retail sales should follow suit and continue to increase. In addition, with regard to the increase in online retailing, Colliers observes that some online-only retailers are beginning to show an interest in acquiring physical outlets to provide 'click-and-collect' style services. Whilst this may benefit larger settlements, those lower in the hierarchy may experience a decline in demand for physical floorspace.

3.72 At a local level, the Northern Ireland Retail Update 2015, published by Lisney, advises that there has been an overall reduction in retail vacancy rates throughout the Province. However, vacancies in out-of-centre and prime town centre locations have experienced a reduction from 17.1% in 2014 to 14.6% in 2015. In terms of secondary retailing locations, the average vacancy rate has increased from 18.8% in 2014 to 22.67% in 2015. This is attributed to the recent rates revaluation which resulted in prime retail locations becoming more affordable to new and existing retailers. The report expects the retail sector to continue to improve throughout 2016.

3.73 Lisney's conclusions are echoed by CBRE Northern Ireland who, in their Outlook 2016, reported that the retail sector experienced a healthy 2015 with overall growth gaining momentum. It is predicted that retail sale will continue to grow throughout 2016, particularly as several operators plan expansion, an increased focus upon refurbishment and extension to existing premises rather than new-build, and a strong appetite for investment in retail opportunities. Whilst CBRE expects vacancies to continue to fall, this is likely to be restricted to prime retail locations; therefore rental growth is unlikely to occur outside these areas.

### Retail Expenditure

3.74 The Retail Expenditure Guide 2015/16, published by Pitney Bowes, advises that, between 2013 and 2014, the convenience spend decreased by 1.7% - continuing a 9 year trend whereby expenditure directed towards convenience goods has fallen. Per capita spending on convenience goods is estimated to be 14% below its 2005 peak. Comparison expenditure on the other hand has fared much better – experiencing an increase of 5.7% during the period 2013-

14. As the UK economy showed its first signs of contraction in 2009, per capita spending on comparison goods fell by 1.6%. Since then, it has recovered strongly, and by 2014, comparison spending was 14% above the 2008 level. The trends with regard to convenience and comparison expenditure reflect the global economic downturn and a period of stagnant income growth. This period also saw the price of convenience goods increase, whilst those relating to comparison remained stable. As a result, households decided to cut back on convenience goods and increase spending on comparison goods.

3.75 Historically, comparison goods have accounted for an increasing share of household spending with an average growth rate between 1964 and 2014 of 4.6% per year. By way of contrast, convenience goods expenditure growth has been much slower than that relating to comparison. Between 1964 and 2014, spending on convenience goods increased by 0.2% per annum. As of 2014, comparison goods represented approximately 63% of all retail goods expenditure in the UK.

3.76 Table 3.5 details the estimated per capita expenditure with regard to convenience and comparison goods in 2014 as presented in the Retail Expenditure Guide 2015-16. However, these figures relate to UK average expenditure, therefore values specific to Northern Ireland are likely to be lower in the context of lower average income and available expenditure. This information will be ascertained in the next stage of Plan preparation.

**Table 3.5: Average UK Retail per Capita Expenditure in 2014 (2011 Prices)**

| Retail Sector | Spend per Capita | Proportion of Total Retail Spend per Capita |
|---|---|---|
| Convenience Goods | £1,876 | 35.5% |
| Comparison Goods | £3,410 | 64.5% |
| All | £5,285 | |

*Source: Retail Expenditure Guide 2015/16, Pitney Bowes/Oxford Economics, 2015*

### Convenience Retailing

3.77 The major convenience retailers such as Asda, Sainsburys and Tesco follow a multi-channel approach to retail provision. Retail offer is provided in the traditional store-based format, but through technological advances, operators are increasing their online presence, affording the opportunity to purchase goods online, and having them delivered direct to consumers, or facilitating collection at a chosen store.

3.78 Discount retailers such as Lidl and Aldi are placing the larger convenience operators under increasing pressure as they become more competitive and consumers become less loyal to major stores and brands. These retailers traditionally provide a limited range of convenience goods at low prices, and have thus far been successful in diverting a significant amount of trade from the larger offer. As a consequence, in recent years, the combined market share of Aldi and Lidl has increased whilst the revenues of larger retailers, particularly Tesco, have fallen (0.3% between the 2014 and 2015 financial years).

3.79 Competition in the convenience retail market is expected to continue in the future, with income growth slowing down and food prices stabilising. It is therefore evident that the competitive nature of the market will impact upon the means by which the convenience retailers such as Asda, Sainsburys and Tesco operate in the future.

3.80 Shopping habits have evolved somewhat with consumers now electing to purchase smaller quantities of groceries on a more frequent basis, rather than via a traditional, 'weekly shop'. It is acknowledged by the larger retailers that they will have to adapt in order to reflect and meet changing customer needs, and that this will require them to offer greater flexibility in how consumers shop and ensure products can be purchased whenever and wherever desired, whilst also maintaining continued value for customers. Continued pressure in the food retail sector has caused many of the major convenience retailers to announce the curtailment of plans for significant capital investment and expansion. Sainsburys in particular has observed that smaller local stores are a key component to success due to the changing shopping patterns outlined above. However, this does not mean that the days of the large food superstore and supermarkets are numbered.

3.81 Due to the aforementioned changes in consumer shopping patterns, local shopping provision is becoming increasingly more important. The strength of local shops, particularly the small supermarkets, owned/operated by distributors such as Hendersons and Musgrave, is that they have a significant presence across relatively small areas through various store brands. Such retail provision can therefore compete with the larger stores, albeit to a lesser extent than the discount retailers. However, this means that, the impact of proposed new superstores will be felt more directly by these smaller stores, therefore placing them in greater risk to closure.

3.82 'Retail Futures 2018', a research document published by the Centre for Retail Research in 2013, estimates that the number of shops in the UK will fall by approximately 22% between 2012 and 2018. The CRR report suggests that the convenience sector will experience the least impact with regard to store closures with a projected reduction of approximately 17.2%. Despite this trend, supermarkets and superstores are actually anticipated to experience growth (10%), whereas other convenience/food specialists such as bakeries, greengrocers, and butcher shops are forecast to experience a major decline of approximately 60%.

### Comparison Retailing

3.83 Retail trends with regard to comparison retailing are less apparent given the diverse nature of this aspect of the retail sector. However, given competition in the marketplace, guaranteed success in the comparison retail sector is unstable – highlighted with the recent closure of BHS stores throughout the UK, and the continuing financial struggle being experienced in the Republic of Ireland by Debenhams Retail (Ireland) Ltd.

3.84 During the global economic downturn, many retailers, particularly in the comparison sector, sought to amend lease agreements particularly with regard to the costs of rent. This trend has continued, with many operators declining to agree lease extensions or new leases unless rental costs are reduced significantly in order to guarantee the sustainability of their respective businesses.

3.85 The Centre for Retail Research suggests that the number of comparison stores in the UK will experience a significant reduction between 2012 and 2018 – particularly those relating to electricals, durables and DIY (29.1%). Observations over the past few years provide a degree of anecdotal evidence to this forecast whereby brand reconciliation with regard to Currys and Dixons, whilst PC World outlets closed and reopened within Currys stores. Additionally, in an effort to rationalise their business model, Kingfisher announced the closure of 65 B&Q stores throughout the UK.

### Special Forms of Trading

3.86 The proportion of available retail expenditure that does not flow through traditional retail outlets (i.e. not attributed to retail floorspace) is commonly referred to as 'Special Forms of Trading' (SFT). Perhaps the most notable component of SFT is online retailing (e-tailing), but it also includes markets and market stalls, door-to-door sales, telephone sales and mail order. It is widely accepted that consumer preference for online retailing has continued to increase since its inception. The popularity (i.e. market share) of online retailing is often described as following a classic S-curve, whereby there is slow growth at the outset, followed by rapid increase in uptake, and an eventual plateau (where sales level off).

3.87 The Centre for Retail Research (CRR) recently published updated research with regard to online retailing. The CRR identifies that online retailing is the main driver for growth in the retail sector throughout Europe, with annual growth rates of 18.4% in 2014, 18.6% in 2015 and an estimated 16.7% for 2016. In contrast, the annual growth rates for conventional retailing range between 1.5% and 3.5%.

3.88 A major contributor to the growth in online sales has been the global economic downturn, which has persuaded consumers to purchase online rather than from traditional shops. The increasing use and availability of mobile technology, and the realisation that the internet search is an easy way of researching, comparing and purchasing products has made online retailing attractive and convenient. The European online retail market is dominated by the UK which, in 2015, accounted for 33.4% of all online sales in Europe. The CRR estimates that online sales in the UK in 2015 amounted to £52.25bn, a 16.2% increase from the previous year. With an estimated £60.04bn of online sales in 2016, e-tailing is expected to grow by a further 14.9%.

3.89 The CRR estimates that in 2010, online retailing accounted for 9.4% of all retail sales, however, by 2014, the market share had increased to 13.5%. As of 2015, the online share in the UK was considered to be 15.2%, with an estimated increase to 16.8% forecast for 2016.

3.90 It is widely acknowledged that the growth of online retailing will impact upon conventional retail formats. The CRR considers that, as a result of rapid expansion of online retailers, combined with a fairly stagnant retail market, the level of sales via traditional shops will diminish. The CRR estimates that store based sales have decreased by 1.1% (2014) and 2.0% (2015), with a projected fall of 3.4% in 2016. The likely impact of this increasing growth in online retailing, and declining reliance upon the traditional shop will be a fewer number of stores and a reduced level of employment in the retail sector.

**Location of Future Retailing**

3.91 As referred to above, 'Retail Futures 2018', is a research document published by the Centre for Retail Research in 2013, which predicts a significant reduction in the number of stores in the UK between 2012 and 2018.

3.92 In terms of the impact of this reduction based on location, the CRR predicts that the number of town centre stores could fall by 19.9%, whilst out of town centres may experience a 2.7% net increase in the number of stores.

3.93 The greatest impact however, may be observed by neighbourhood retailing, with a predicted fall estimated to be in the region of 26.2%. This is primarily due to declining profitability of the retail format, and the unwillingness of retailers to operate in these locations instead of town centres, retail parks, and even internet shopping, all of which are perceived to offer lower overhead costs and better availability of stores.

**Future Retail Need**

3.94 The requirement for additional retail floorspace in the Borough will be borne out of research primarily in the form of town centre health checks and the assessment of need and capacity with regard to future retail development.

3.95 The identification and understanding of retail trends, and their consideration in the context of the Borough's existing retail offer will be central to the assessment of future retail need. Whilst this range of data is not currently available, this will form part of the next stage in Plan preparation.

**Key Findings**

3.96 The evidence presented in this section has led to the identification of the following key findings:

- The RDS recognises the role of the Belfast Metropolitan Area, particularly Belfast City Centre, with regard to retail provision alongside that of services, administration, culture and education.
- The RDS identifies Antrim as a main hub due to its excellent healthcare provision and expanding retail offer.
- The SPPS requires the Local Development Plan to:
    - Secure a town centres first approach for the location of future retailing and other main town centre uses;
    - Adopt a sequential approach to the identification of retail and other main town centre uses;
    - Be informed by robust and up-to-date evidence in relation to need and capacity;
    - Protect and enhance diversity in a range of town centre uses appropriate to their role and function , such as leisure, cultural and community facilities, housing and business;
    - Promote high quality design to ensure that town centres provide sustainable, attractive, accessible and safe environments; and
    - Maintain and improve accessibility to and within the town centre.
- Retail provision is distributed throughout the Borough in the current hierarchy of centres comprising:
    - 1 Primary Retail Core (Antrim Town);
    - 4 Town Centres (Antrim Town, Ballyclare, Crumlin & Randalstown);
    - 2 District Centres(Abbey Centre & Northcott); and
    - 1 Local Centre (Glengormley).
- Prominent out-of-centre retail locations include:
    - Junction One; and
    - Numerous retail parks in close proximity to Abbey Centre District Centre.

- The Abbey Centre District Centre and surrounding retail provision may be the largest single concentration of comparison retail offer in Northern Ireland.
- The Borough's most prominent out-of-centre retail locations are sites at Junction One and outside the Abbey Centre District Centre – Valley Retail Park, Shore Road Retail Park, and Mill Road.
- There are a significant number of convenience retailers operating in the Borough, including Asda, Tesco, Marks and Spencer, Lidl and Iceland, including no less than 6 large superstore-format convenience retail outlets across the Borough – all of which are operated by Asda and Tesco
- Vacancy is a prevalent issue in the Borough, particularly in Antrim, Ballyclare and Crumlin Town Centres, and in Glengormley Local Centre.
- Consumer expenditure for convenience shopping has declined for each of the past 9 years – now estimated to be 14% below its 2005 peak. Conversely, comparison retail expenditure has continued to increase year-on-year since 2008.
- As a result of sustained competition within the convenience retail sector, particularly between the larger retailers such as Asda, Sainsburys and Tesco, and discount retailers, it is likely that larger stores may have to adapt their operating format to reflect and meet changing customer needs.
- Consumer habits are changing, especially in the context of convenience retailing, where there has been a move away from the traditional weekly shop in favour of more frequent, smaller quantity purchases. Consequently, local shopping is becoming increasingly important given the potential for competition with major convenience retailers.
- The Global economic downturn has been a major contributing factor in the growth of online retailing – in 2015 the UK accounted for 33.4% of all online sales in Europe.
- The Centre for Retail Research predicts that the number of out-of-centre stores in the UK will have increase by 2.7% between 2012 and 2018, whilst town centres stores will have fallen by 19.9%, and neighbourhood retailing will have declined by 26.2%

**Next Steps**

3.97 Further research will be required to establish a comprehensive analysis of retail provision in the Borough to facilitate the assessment of retail need and capacity. A critical part of this research will include town centre health checks incorporating quantitative information based upon land use and vacancy surveys, in addition to qualitative data relating to the physical structure and environmental quality of centres, and public attitudes and perceptions. Land use surveys are likely to form a critical part of this research, particularly within the Borough's towns, villages, and district and local centres, as these will facilitate the identification of the current makeup of these locations; and will assist in the provision of a baseline relating to the extent of retail provision and vacancy in the Borough. Town centre health checks In addition, identification

3.98 The identification and understanding of retail trends local, national and regional relevance will also be incorporated into this research. This will include the consideration of vacancy trends, retail expenditure (consumer spending) patterns, the growth and associated effects of special forms of retailing such as online retailing, and recent developments in the retail sector such as the variation of retail formats.

# 4 Commercial Leisure

4.1 This section relates to the topic of commercial leisure , and identifies, collates, and discusses evidence comprising:

- Regional Policy Context;
- Existing Development Plans and Operational Planning Policy;
- Other Relevant Strategies/Legislation;
- Existing Commercial Leisure Provision;
- Future Commercial Leisure Provision;
- Key Findings; and
- Next Steps.

4.2 Commercial leisure relates to recreation and leisure facilities that are indoor or covered. This includes all uses identified within Class D2 (Assembly and Leisure) of the **Planning (Use Classes) Order (Northern Ireland) 2015** and specific sui generis uses including:

- Bingo halls, cinemas, concert halls, dance halls and theatres;
- Amusement arcades, betting offices, public houses and nightclubs;
- Restaurants, cafes, and hot food bars; and
- Swimming baths, skating rinks, gymnasiums, and other indoor or covered areas for sport or recreation.

4.3 Outdoor recreation including hill walking, cycling, angling, golf, horse riding and sailing are not considered to be commercial leisure. This is also the case with regard to open space provision for children and teenagers (outdoor play areas, skateboard parks, etc.), parks and gardens, and amenity green space.

**Regional Policy Context**
**Everyone's Involved – Sustainable Development Strategy**

4.4 Whilst none of the Priority Areas for Action outlined in the SDS relate specifically to this topic, it is clear that commercial leisure provision has a role to play in the building of a dynamic economy, and the strengthening of society, and the promotion and improvement in the health and wellbeing of citizens.

**The Regional Development Strategy (RDS) 2035 – Building a Better Future**

4.5 The RDS does not provide specific Regional Guidance (RG) or Spatial Framework Guidance (SFG) policies with regard to commercial leisure, however, it does acknowledge that the enhancement of existing, or creation of new commercial leisure facilities will improve its potential to benefit from tourism. Furthermore, the Strategy recognises that the provision of certain types of development, including commercial leisure, provides an opportunity to bring communities together (*RG6*). Where the availability of space limited, the provision of new facilities may require an element of proactive regeneration to enhance accessibility, vibrancy and choice (*RG7*). This regeneration may also act as a catalyst for further investment in centres leading to revitalisation and increased sustainability.

4.6 The RDS identifies Antrim as a "main hub" due to its excellent healthcare provision and expanding retail offer. The town's linkage to the transportation network reinforces the strength of Antrim in providing easy access to all parts of the Province.

**Strategic Planning Policy Statement for Northern Ireland (SPPS)**

4.7 Whilst there is no specific subject policy within the SPPS with regard to commercial leisure provision, it is clear that the topic falls for consideration in a similar context to that of town centres and retailing. In that regard, the SPPS establishes several strategic objectives for town centres and retailing including commercial leisure services. These objectives seek to:

- secure a town centres first approach for the location of future retailing and other main town centre uses (including cultural and community facilities, retail, leisure, entertainment and businesses);
- adopt a sequential approach to the identification of retail and other main town centre uses in Local Development Plans (LDPs) and when decision-taking;
- ensure LDPs and decisions are informed by robust and up-to-date evidence in relation to need and capacity;
- protect and enhance diversity in the range of town centre uses appropriate to their role and function, such as leisure, cultural and community facilities, housing and business;
- promote high quality design in order to ensure that town centres provide sustainable, attractive, accessible and safe environments; and
- maintain and improve accessibility to and within the town centre.

4.8 In preparing Local Development Plans, the SPPS requires that councils undertake an assessment of the need or capacity for retailing and other main town centre uses across the Plan area. This is likely to involve town centre health checks, which may, if considered appropriate, be extended to other locations throughout the Borough.

4.9 In the same context as retailing, for the purposes of commercial leisure provision, the SPPS advises that LDPs should:

- define a network and hierarchy of centres – town, district and local centres, acknowledging the role and function of rural centres.

- define the spatial extent of town centres and the primary retail core;
- set out appropriate policies that make clear which uses will be permitted in the hierarchy of centres and other locations, and the factors that will be taken into account for decision taking;
- provide for a diverse offer and mix of uses, which reflect local circumstances; and
- allocate a range of suitable sites to meet the scale and form of retail, and other town centre uses.

**Existing Development Plans and Operational Planning Policy**

4.10 The specific topic of commercial leisure is a recent addition in the context of spatial planning. As a consequence, neither the Antrim Area Plan nor the Belfast Metropolitan Area Plan, make reference to commercial leisure. However, the Antrim Area Plan does recognise, in broad terms, that the town centres of Antrim, Crumlin and Randalstown should be seen as the entertainment and social centres, alongside the primary uses for shopping and office accommodation, and in tandem with residential and other commercial development uses.

4.11 Whilst specifically referring to retailing, the Belfast Metropolitan Area Plan advises that leisure uses will be expected to locate within designated city and town centre boundaries. However, the Plan does recognise the complementary role of commercial leisure uses, such as bars, cafes, and restaurants, to the primary shopping function of city and town centres, and the valuable contribution made to the evening or night-time economy.

4.12 Operational planning policy with regard to commercial leisure provision was introduced following the publication of the Strategic Planning Policy Statement. Details of this policy, akin to that of retailing, have been outlined earlier in this section.

**Other Relevant Strategies/Legislation**
**Newtownabbey Regeneration Strategy**

4.13 The Newtownabbey Regeneration Strategy provides guidance as to the location and form of development opportunities in Ballyclare and Glengormley over a twenty year period from 2011. It assists the decision making process with regard to the promotion, implementation and timing of urban regeneration initiatives in these areas. The purpose of the Strategy is to direct public and private sector investment to those areas that will most benefit local people, support local businesses and contribute to the long-term vitality and viability of Ballyclare and Glengormley. The Strategy specifically recognises that Glengormley has a distinct advantage whereby it can capitalise on the potential to provide space for commercial leisure provision in the centre, and to make it a regional attraction.

### Glenwell Concept Plan

4.14 The Glenwell Concept Plan builds upon the recommendation within the Newtownabbey Regeneration Strategy that Glengormley should be the focus of new commercial leisure provision in the Borough (referring to the legacy Newtownabbey Borough), and benefit from the tourism industry that is primarily centred on Belfast. The Concept Plan further develops the potential of Glengormley as a unique commercial leisure hub tjat will appeal to residents and tourists alike, and provides the basis for more detailed investigation with regard to the regeneration of this area.

### Antrim Town Centre Masterplan and Implementation Strategy

4.15 This Masterplan identifies a range of potential redevelopment/regeneration sites in Antrim Town Centre. Of particular relevance is the existing car park at Railway Street, which is considered in the Masterplan as an ideal location for mixed-use re-development, which would include leisure uses.

### Existing Commercial Leisure Provision

4.16 Given the range of uses included in the commercial leisure sector, more accurate information will only become available through the completion of detailed land use surveys and use of other available sources of information. Initial research has facilitated the identification of commercial leisure establishments throughout the Borough, a summary of which is presented in Table 4.1.

**Table 4.1: Current Commercial Leisure Provision in Antrim & Newtownabbey Borough Council**

| Commercial Leisure | Antrim & Newtownabbey Borough Council | |
|---|---|---|
| | No. | % |
| Bingo Halls, Amusement Arcades/Centres, Betting Offices | 21 | 15% |
| Restaurants, cafes, hot food bars, including licensed premises | 100 | 69% |
| Cinemas | 2 | 1% |
| Concert halls, Dance halls and Theatres | 3 | 2% |
| Indoor Sport or Recreation Facilities | 19 | 13% |

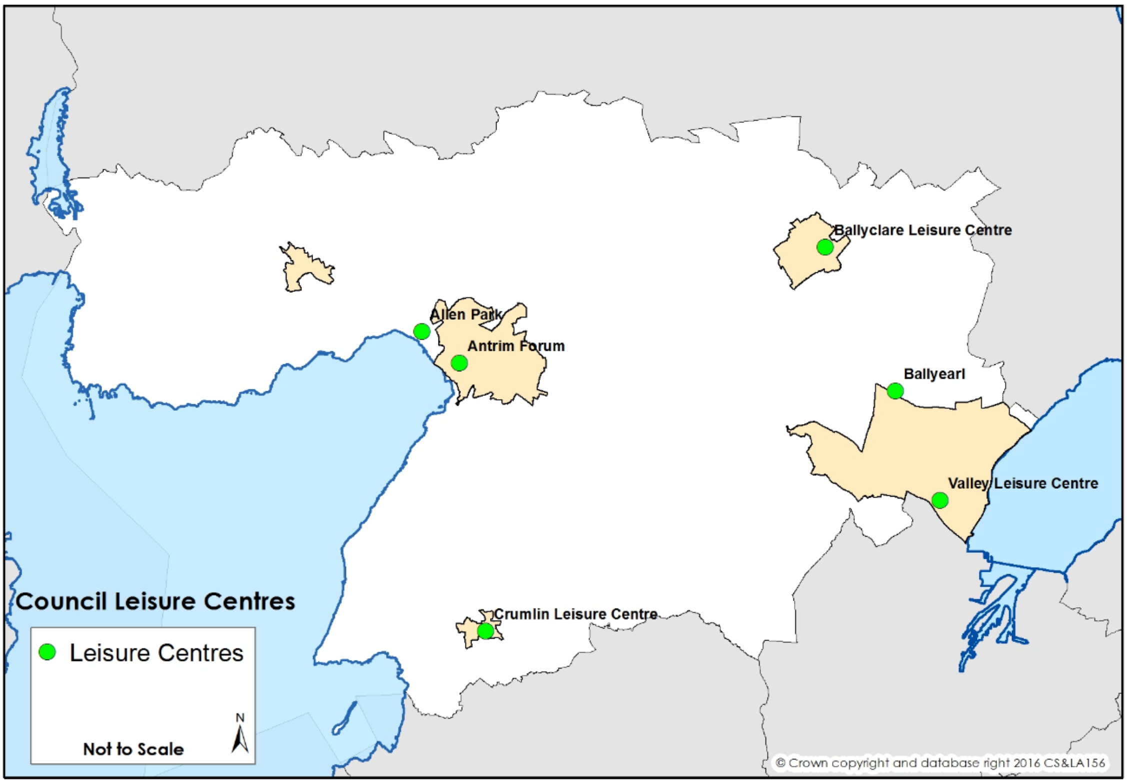
*Source: Land & Property Services – Property Data Product, December 2015*

*(Note: Figures exclude community centres, private gymnasiums/fitness suites, and sports clubs)*

4.17 The data presented in the above table underlines the dominance of the service sector in the Borough's commercial leisure provision, including restaurants, cafes, and licensed premises i.e. public houses and hotels.

4.18 Indoor Sport or Recreation Facilities includes the Borough's six existing leisure facilities at Valley Leisure Centre, Sixmile Leisure Centre, Ballyearl Arts and Leisure, Antrim Forum, Crumlin Leisure Centre, and Allen Park. Figure 4.1 details the distribution of leisure facilities throughout the Borough that are owned/managed by the Council.

**Figure 4.1: Council Leisure Facilities**




*Source: Antrim and Newtownabbey Borough Council*

4.19 Venues for entertainment, such as cinemas, concert halls and theatres accounts for just over 3% of all existing provision with five establishments located throughout the Borough. Antrim (Junction One) and Glengormley provide the Borough's only offer in terms of cinema, with two theatres being located in Metropolitan Newtownabbey, and a third sited in Antrim Town Centre.

4.20 The overlap between commercial leisure, tourism and recreation facilities is clearly evident. Tourism, incorporating tourist facilities and accommodation is considered later in this evidence paper. Open Space, Sport and Outdoor Recreation is outlined in the separate Evidence Paper: Meeting the Needs of Society.

4.21 Information relating to commercial leisure provision throughout the Borough will be provided in greater detail as preparation of the Borough's new Local Development Plan progresses.

**Future Commercial Leisure Provision**

4.22 Future commercial leisure provision in the Borough has been outlined in the Newtownabbey Regeneration Strategy, Glenwell Concept Plan and Antrim Town Centre Masterplan and Implementation Strategy, as described earlier in this section.

4.23 The provision of commercial leisure facilities is subject to demand and market conditions, particularly those relating to indoor recreation and entertainment. The purpose of the Local Development Plan is not to deliver these facilities, but to ensure that they can be accommodated in appropriate locations where they provide maximum benefit to society, the environment, and to the economy.

**Key Findings**

4.24 The evidence presented in this section has led to the identification of the following key findings:

- The SPPS and existing Development Plans underpin the consideration that town centres are the appropriate location for commercial leisure development. Consequently, the SPPS promotes the adoption of a town centres first approach for the location of future commercial leisure provision.
- The Borough can capitise upon the potential to provide space for commercial leisure development and to tap into the tourism industry centred on Belfast to the benefit of residents and visitors alike. This is particularly the case for Glengormley.
- Commercial leisure provision in the Borough is dominated by the service sector, particularly hospitality, with over 69% of the Borough's commercial leisure provision existing in the form of restaurants, cafes, hot food bars and licensed premises.
- Commercial leisure uses have an important complimentary role to the primary shopping function of city and town centres, in addition to the significant contribution that they can make to the local day-time and night-time economies.
- The commercial leisure sector is highly complex and dynamic, as commercial leisure uses are particularly sensitive to changes in economic conditions, population, lifestyle, and fashion trends. As a

result, forecasting the growth of this sector and identifying the need for new facilities is highly complicated.

**Next Steps**

4.25 Further research will be required to establish a detailed overview of commercial leisure provision in the Borough. This research is likely to comprise land use surveys, as a component of town centre health checks, in order to establish a detailed schedule of all commercial leisure provision in the Borough, which can then be maintained as appropriate. This will provide a baseline for the assessment of need and capacity relating to commercial leisure provision as required by the SPPS. Given the significant overlap, in strategic policy terms, with retailing and town centres, there may be some value in amalgamating research strands.

# 5 Tourism

5.1 This section relates to the topic of tourism, and identifies, collates, and discusses evidence comprising:

- Regional Policy Context;
- Existing Development Plans and Operational Planning Policy;
- Other Relevant Strategies/Legislation;
- Economic Role of Tourism in Northern Ireland;
- Tourism in Antrim and Newtownabbey;
- Tourist Accommodation in Antrim and Newtownabbey;
- Tourist Attractions/Infrastructure in Antrim and Newtownabbey;
- Key Findings; and
- Next Steps.

5.2 The tourism sector makes an essential contribution to the economy and to our quality of life, providing an increasing flow of income through spending by visitors; it also contributes to increasing levels of private investment and a sense of community pride. Tourism is also a substantial provider of employment both directly and indirectly, particularly in rural areas. Whilst tourism provides an opportunity for communities in the Borough to develop, plans must recognise the need for a sustainable approach and not diminish the assets that bring visitors to the area.

5.3 Whilst tourism development and the service sector jobs that support it are an important part of the economic make up of Northern Ireland, the development and exploitation of those assets that tourism is built upon, such as heritage and natural environment attractions, can have significant environmental impacts if not managed sustainably. Whist some sites and locations of the Borough can be further exploited to secure tourism growth others have limited capacity and by their nature, scale, location must be protected.

5.4 If tourism development is planned and managed sustainably it will contribute to the creation of job opportunities, a more skilled employment base, successful communities and a more attractive offer to visitors.

5.5 It is important to remember that many tourism facilities are also heritage sites and therefore have a limited capacity for development, additionally many tourism assets are activity-based and are predominantly rural in their location; transportation between to and from these sites is often the most significant issue to address in any development.

**Regional Policy Context**

**Everyone's Involved – Sustainable Development Strategy**

5.6 Whilst none of the Priority Areas for Action outlined in the SDS relate specifically to this topic, it is clear that tourism has a role to play in the building of a dynamic economy, and the strengthening of society, particularly with regard to job creation and the improvement of quality of life through experiencing, participating in, and accessing cultural and sporting pursuits.

**The Regional Development Strategy (RDS) 2035 – Building a Better Future**

5.7 The RDS acknowledges the potential contribution that tourism can make to the economy, society and the environment of Northern Ireland. This is particularly the case when tourism facilities and associated infrastructure can be introduced or enhanced. The Strategy also recognises that the tourism industry has a role to plan in creating employment opportunities in rural areas, particularly where they are integrated in a sustainable and environmentally sensitive manner.

5.8 Antrim is specifically identified by the RDS as a town where tourism provision can be enhanced. The location of the town, and proximity to Lough Neagh and its tributary rivers provides the potential for tourism facilities such as water-based activities, scenic walks, and angling. The strong hospitality sector in the Antrim area is likely to function as a lure to draw additional visitors to the town.

5.9 The RDS contains Regional Guidance (RG) and Spatial Framework Guidance (SFG) policies. The RDS promotes a sustainable approach to the provision of tourism infrastructure in order to deliver economic benefits (RG4). Also related of relevance to tourism are policies RG2 and RG11, which promote a balanced approach to transport infrastructure, and the conservation, protection and enhancement of built heritage and the natural environment.

**Strategic Planning Policy Statement for Northern Ireland (SPPS)**

5.10 The SPPS recognises the important contribution that tourism makes to the Northern Ireland economy in terms of revenues, employment, and the overall potential for economic growth. The Northern Ireland Executive has identified tourism as a major component in creating and supporting a sustainable economy and investing in the future. So vital is the contribution of tourism to the local economy, that the Executive contains key strategic targets for tourism which ultimately aspire to develop tourism into a £1billion industry in Northern Ireland by 2020.

5.11 The SPPS advises that sustainable tourism development is delivered through balancing the needs of tourists and the tourism industry with conserving the tourism asset. Through the application of planning policies which identify appropriate development opportunities whilst safeguarding tourism assets, the planning system has a key role in managing tourism-relating development. The SPPS seeks to contribute to regional economic growth whilst also sustaining vibrant rural communities through facilitating growth in tourism. It reiterates many of the recommendations of the Regional Development Strategy through the promotion of all tourism-related development provided it:

- is sustainable and environmentally sensitive;
- protects the tourism asset from inappropriate development;
- develops the tourism potential of settlements; and,
- is of an appropriate nature, location, and scale; of a high standard of quality and design.

5.12 With regard to Regional Strategic Policy within the Local Development Plan, the SPPS requires that there is a general presumption in favour of tourism-related development within settlements, subject to the acceptability of a proposal in relation to normal planning requirements. The SPPS states that tourism development must be managed carefully in the countryside, with development within settlements preferred. However, it is acknowledged that this may not always be possible, and a methodology akin to a sequential approach to site selection is cited.

5.13 Reiterating the requirements of PPS16, the SPPS clarifies that a tourism strategy, which should form part of the LDP, should reflect wider government tourism initiatives and should address the following issues:

- How future tourism demand is best accommodated;
- Safeguarding of key tourism assets;
- Identification of potential tourism growth areas;
- Environmental considerations; and
- Contribution of tourism to economic development, conservation and urban regeneration.

5.14 Stemming from the tourism strategy, the LDP will be required to provide a policy framework which manages tourism development throughout the Borough, with particular focus upon development in the countryside and the safeguarding of tourism assets such as built and natural heritage. In addition, this should also include policies for development such as tourist accommodation and amenities, together with criterion for the consideration of proposals. It may also be necessary, given the direction of the SPPS to include guidance with regard to design considerations, particularly with regard to Conservation Areas and Areas of Townscape Character.

**Existing Development Plans and Operational Planning Policy**

5.15 The Antrim Area Plan aims to encourage the development of tourist facilities in the respective area, whilst conserving and enhancing the quality of the natural landscape and protecting wildlife habitats, and to facilitate an increase in tourist accommodation of an appropriate nature, location and scale.

5.16 It identifies several tourist assets in the Borough, including Shane's Castle, the Lough Neagh water system, Randalstown and Tardree forests, the Riverside Conservation Area, and Castle Upton. It acknowledges that there is potential within the area for future tourism development which will be dependent upon the development of activities around Lough Neagh, developing the appeal of the area with regard to business/conference-based tourism, and the provision of accommodation – particularly in the farm and country-house sector.

5.17 The Belfast Metropolitan Area Plan reinforces the emphasis upon sustainable tourism, and the provision for growth in tourist accommodation alongside the promotion of tourist development to enhance the overall product and visitor experience. The Plan recognises the potential for tourism development across the BMA, particularly in rural settlements and within the urban areas. Furthermore, it also acknowledges that, where a council has prepared a tourism strategy, this can be used for the marketing and development of new facilities, or the enhancement of existing provision. BMAP also emphasises the need for quality in the urban environment, particularly to enhance the first impressions of an area by raising the standard of new developments.

5.18 BMAP also refers to a Newtownabbey Tourism Strategy, which is centred on retail developments, history, and culture as the main focus for tourism development. Building on the improved facilities at Mossley Mill and Sentry Hill, it supports the development of new tourist facilities, and encourages recreational development at Valley Park, Carrickfergus Escarpment and Carnmoney Hill.

5.19 The Plan Strategy highlights that tourism potential in Newtownabbey is based upon its significant natural assets (the Belfast Hills, Carrickfergus Escarpment, and various parklands). The area also benefits from its proximity to the Belfast tourism market, in addition to its "gateway" location on the route to Belfast International Airport and the Antrim Coast Road.

5.20 Current Operational Planning Policy with regard to tourism is contained in the Planning Strategy for Rural Northern Ireland (PSRNI), Planning Policy Statement 16: Tourism (PPS 16), Planning Policy Statement 4: Planning and Economic Development (PPS 4), Planning Policy Statement 21: Sustainable Development in the Countryside (PPS 21). Until a new Plan Strategy is adopted by Council, transitionary measures allow for the retention of the current provisions contained within existing operational planning policy.

5.21 Whilst the majority of policies contained within the PSRNI have been superseded by provisions contained within subsequent Development Plans or Planning Policy Statements, the strategic policy objectives of the Strategy prevail. The policies with relevance to tourism include:

- Advance Direction Signs (Policy TOU 5); and

- Community Needs (Policy PSU 1).

5.22 The key aim of PPS16 is to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environment. It sets out planning policies for tourism related development including tourist attractions and amenities, and associated accommodation.

5.23 Operational planning policies within PPS 16 relate to :

- Tourism Development in Settlements (Policy TSM 1);
- Tourist Amenities in the Countryside (policy TSM 2);
- Hotels, Guest Houses and Tourist Hostels in the Countryside (Policy TSM 3);
- Major Tourism Development in the Countryside – Exceptional Circumstances (Policy TSM 4);
- Self-Catering Accommodation in the Countryside (Policy TSM 5);
- New and Extended Holiday Parks in the Countryside (Policy TSM 6);
- Criteria for Tourism Development (Policy TSM 7); and
- Safeguarding Tourism Assets (Policy TSM 8).

*5.24* PPS 4 sets out planning policies for economic development and indicates how growth associated with such uses can be accommodated and promoted in development plans. It seeks to facilitate and accommodate economic growth in ways compatible with social and environmental objectives and sustainable development.

*5.25* Policy PED 4: 'Redevelopment of an Established Economic Development Use in the Countryside' considers proposals for the redevelopment of an established economic development use in the countryside for industrial or business purposes. This policy refers specifically to proposals involving the alternative use of economic development sites for tourism purposes.

5.26 The primary aim of PPS 21 is to manage development in the countryside in a manner which strikes a balance between the need to protect the countryside from unnecessary or inappropriate development, whilst supporting rural communities. It sets out planning policies and main planning considerations in assessing proposals for development in the countryside.

5.27 Policies with relevance to the topic of tourism include:

- Development in the Countryside (Policy CTY 1);
- Development in Dispersed Rural Communities (Policy CTY 2); and
- Farm Diversification (Policy CTY 11).

5.28 A strategic level review of operational planning policy is examined further in the Policy Review Evidence Paper.

**Other Relevant Strategies/Legislation**

**Newtownabbey Regeneration Strategy**

5.29 The Newtownabbey Regeneration Strategy provides guidance as to the location and form of development opportunities in Ballyclare and Glengormley over a twenty year period from 2011. It assists the decision making process with regard to the promotion, implementation and timing of urban regeneration initiatives in these areas. The purpose of the Strategy is to direct public and private sector investment to those areas that will most benefit local people, support local businesses and contribute to the long-term vitality and viability of Ballyclare and Glengormley.

5.30 Within the Strategy, Ballyclare is seen as a destination of choice for shopping, leisure opportunities and tourism, whereas Glengormley is viewed as a focal point that provides an accessible and convenient range of high quality leisure and entertainment, banking and professional financial services. Both centres have tourism potential, but by varying means – leisure and entertainment provision, shopping, and financial/professional services. It will be the role of the Local Development Plan to facilitate development within these areas, which maximises the opportunity for growth in tourism.

**Glenwell Concept Plan**

5.31 The Glenwell Concept Plan builds upon the recommendation within the Newtownabbey Regeneration Strategy that Glengormley should be the focus of new commercial leisure provision in the Borough (referring to the legacy Newtownabbey Borough), and benefit from the tourism industry that is primarily centred on Belfast. The Concept Plan further develops the potential of Glengormley as a unique commercial leisure hub that will appeal to residents and tourists alike, and provides the basis for more detailed investigation with regard to the regeneration of this area.

**Antrim Town Centre Masterplan and Implementation Strategy**

5.32 This Masterplan identifies a range of potential redevelopment/regeneration sites in Antrim Town Centre. It outlines the numerous challenges with regard to encouraging tourism, and promotes a co-ordinated approach to develop the potential of Antrim's tourism sector.

**Other Masterplans and Village Plans**

5.33 The Borough's Masterplans and Village Plans acknowledge the potential for tourism in their respective areas. Some villages, such as Ballyrobert, Ballynure, and Parkgate cite the need to develop and enhance local community and leisure facilities to encourage local tourism.

### Borough-wide Tourism Strategies/Plans

### Tourism Marketing Plan 2015-2016

5.34 The marketing plan was an outcome of workshops held by the Council with key stakeholders, including service providers in an attempt to outline how tourism in the Borough can be improved. It outlines tourism performance both regionally and locally, investigates current market themes and segments, and identifies potential clustering and/or development opportunities. An Action Plan, which forms part of the Marketing Plan, sets out key activities that should be addressed in order to further develop the tourism sector in the Borough. This relates to a number of key areas including Strategic Development (incorporating a Tourism Strategy and maximising branding/promotion), Product Development, maximising the use of social media, and the marketing of the Borough's tourism assets.

### Tourism Action Plan 2016-2017

5.35 This builds upon the Tourism Marketing Plan 2015-2016, and focusses upon building capacity within the local tourism sector, and maximising the impact of marketing and branding with relevance to the Borough.

5.36 Both areas involved establishing crucial working relationships with a variety of key stakeholders in order to identify issues and develop opportunities with regard to tourism in the Borough. Capacity building involves investigating the potential to hold tourism masterclasses for service providers in the Borough; the promotion of tourism assets; the promotion of tourism assets on the Council's website; and the improvement of access to the Boroughs tourism assets.

5.37 Marketing and branding endeavours to ensure that tourism assets in the Borough are promoted at both local and regional levels. A Visitor Guide has recently been published, which provides details of accommodation and attractions throughout the Borough. Entitled, 'It's in Our Nature: Antrim and Newtownabbey Visitor Guide', it also provides examples of itineraries, and information with regard to travelling around the Borough.

### Tourism Strategic Plan 2016-2020

5.38 Antrim and Newtownabbey Borough Council, in partnership with Tourism NI, is currently working towards the formulation of a Tourism Strategic Plan (2016-2020) that will tie in with the Regional Tourism Strategy currently being prepared by the Department for the Economy (detailed below). It is anticipated that the Strategy will detail the range of visitor servicing provision and activities offered throughout the Borough, and will identify potential opportunities for investment and growth. A 5-Year Action Plan will also form part of the overall Strategy, and will outline how the Council can support and grow the local tourism sector. The Borough's Tourism Strategic Plan is expected to be published in 2017.

**Regional Tourism Strategy**

5.39 The need for a Regional Tourism Strategy was borne out of the Hunter Review, an independent review of the Northern Ireland Tourist Board (NITB) and wider tourism structures, which commenced in December 2013. The Tourism Liaison Branch (within the Department for the Economy) is taking the lead in developing a Regional Tourism Strategy, and are working closely with Tourism NI (formerly NITB), Tourism Ireland, and other key stakeholders. A draft Tourism Strategy is expected to be issued for public consultation by the end of 2016, with the aim of setting the future direction for tourism in Northern Ireland in the context of a new appreciation of the potential for tourism to contribute to the growth of the Northern Ireland economy, and to deliver jobs and investment.

**Regional Tourism Accommodation Policy**

5.40 Tourism Liaison Branch, within the Department for the Economy, has undertaken a consultation on tourism accommodation policy, and a draft policy has been prepared. Currently undergoing appraisal to ensure compliance with the development of a strategic vision for tourism in Northern Ireland, this new policy is expected to be issued in the near future.

**Economic Role of Tourism in Northern Ireland**

5.41 The tourism industry accounts for approximately 5% of Northern Ireland's Gross Domestic Product (GDP). Given the vital contribution of tourism to the Northern Ireland Economy, the NI Executive aspires to creating a £1billion industry. With regard to tourism related employment, the most recent Quarterly Employment Survey (September 2016) advised that as of June 2016, there were 57,310 employee jobs in tourism and leisure industries in Northern Ireland.

5.42 Northern Ireland Tourism Statistics relating to the twelve month period from July 2014 to June 2015 were updated in November 2016. According to this data, there were 4.5 million overnight trips in Northern Ireland, resulting in 15.6million nights spent in the region. Some £748million was spent in Northern Ireland as a result of tourism – an increase of 5% on the preceding 12 month period.

5.43 During the same period, the number of rooms sold in hotels and other commercial accommodation amounted to 2.2million, of which 85% were in hotels. The average occupancy rate in Northern Ireland hotels in 2015 was 67%, with 1.9million rooms sold, representing an increase of 3% over the previous year. With regard to guesthouses, bed and breakfasts, and guest accommodation, the average occupancy rate was 27% - a decrease of 8% to 289,200. This information indicates that 2015 was a positive year for hotel accommodation, whilst conditions for guesthouses, bed and breakfasts and guest accommodation have been more challenging.

5.44 There were 17.5 million visits to local visitor attractions in 2015. Excluding country parks, parks, forests and gardens, the most popular visitor attractions were the Giant's Causeway (0.85million visits),Titanic Belfast (0.62million visits), and the Ulster Museum (0.47million visits).

5.45 Individual aspects of tourism, with particular relevance to the Borough, including employment, overnight trips, stays and expenditure, room occupancy, and visitor numbers, are explored later in this section.

**Tourism in Antrim and Newtownabbey**

5.46 The Borough is strategically positioned in a geographical context to take full advantage of key transport hubs as visitor gateways into Northern Ireland. Antrim and Newtownabbey is home to one of Northern Ireland's five key visitor gateways at Belfast International Airport. A second gateway at the Port of Belfast is just two miles from the Borough's boundary on Belfast Lough. In 2015, Belfast International Airport handled approximately 4.4million passengers, whilst the Port of Belfast handled 1.38million passengers. The Port of Larne, located approximately 19 kilometres to the north-east of the Borough, handles over 0.6million passengers per year. The Borough is located between two of Northern Ireland's most significant 'Key Tourism Destination Areas', namely Greater Belfast and the Causeway Coast. These areas, together with the accessibility provided by public transport hubs and corridors, means that existing tourism assets have the ability to contribute to a more sustainable form of tourism.

5.47 The tourism offer of neighbouring Belfast City Council in particular, and the ease of access to substantial natural assets that include Lough Neagh, Belfast Loughshore, the Lower Bann Valley and parts of both the Belfast Hills and Antrim Hills; have created a diverse range of tourism assets in the Borough.

5.48 Lough Neagh is one of Tourism NI's nine Key Visitor Destinations in Northern Ireland. The Borough has approximately 30% of the 125 kilometre shoreline of the Lough, including Ram's Island, the largest of all the Lough Neagh Islands, and a site significant historic built and natural heritage importantance.

**Tourism Assets in Antrim and Newtownabbey**

5.49 There are approximately 147 tourism assets located throughout the Borough, which includes places to stay, places to visit and a range of activity-based tourism. The tourism offer in the Borough provides in the region of 65 places to stay and 82 places to visit or things to do. Tourism attractions in the Borough include:

- Over 40 activity tourism sites and opportunities;
- 14 Natural Heritage & Nature Attractions;
- 11 Heritage & Historical Attractions;
- 4 Visitor Information Centres;
- 4 Cultural & Arts Attractions; and
- 3 Formal Designed Gardens.

5.50 The Borough has several major attractions of regional significance in terms of visitor numbers and/or of historic and cultural importance such as Antrim Castle Gardens & Clotworthy House and Shane's Castle. These are monitored by NISRA and Tourism NI for visitor numbers and visitor satisfaction. These sites attract significant and growing numbers, whereas the Borough's forests, activity sites, museums and theatres provide a regular and sustainable flow of tourists into the Borough.

5.51 Tourism assets in the Borough are concentrated in several hubs. Antrim Town provides a range of historic, cultural and activity tourism interests. Randalstown and Newtownabbey providing minor hubs, with the latter providing a more commercial leisure focus of tourism interests. Other assets are distributed fairly evenly throughout the Six Mile Water Valley or are close to the A6 corridor. There is a noticeable gap in tourism assets in rural areas to the south of Antrim, Templepatrick and Mallusk despite the area having accommodation available.

**Tourist Accommodation in Antrim and Newtownabbey**

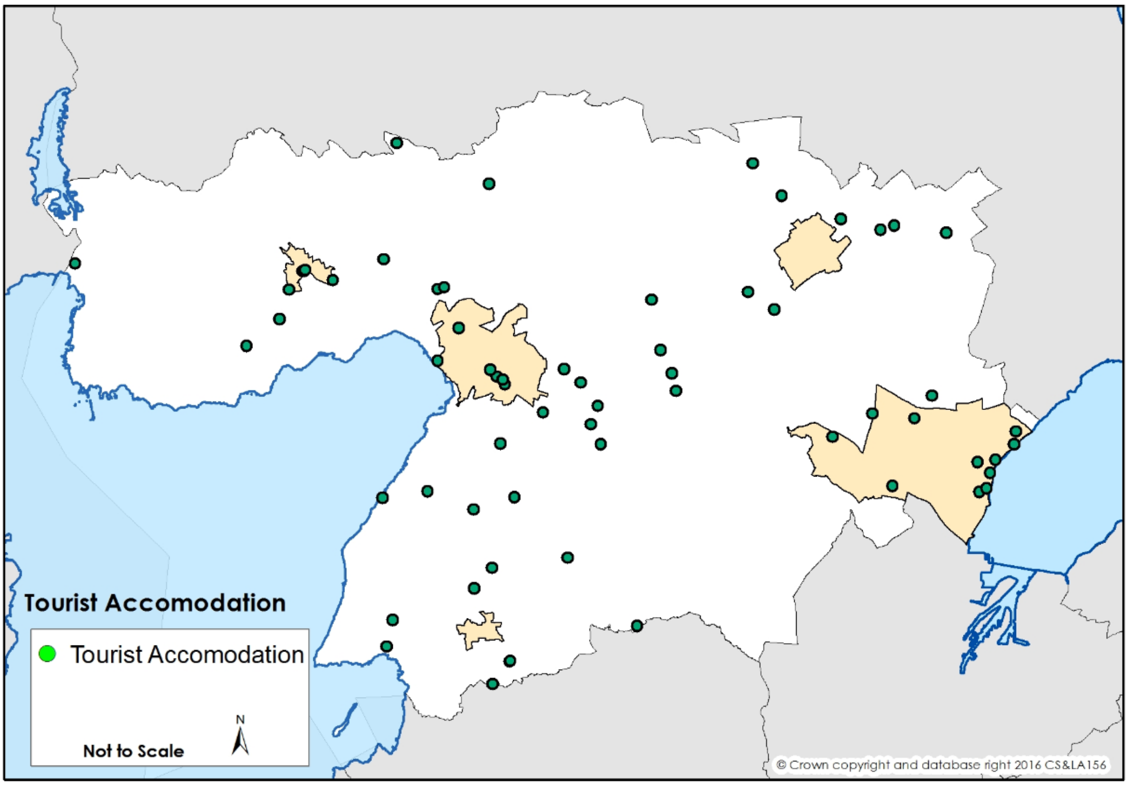
5.52 Tourism NI accommodation stock information shows that that Borough has a variety of traditional forms of visitor accommodation providing approximately 7% of all Northern Ireland stock in 2015. With regard to room occupancy in Northern Ireland during 2015, the Borough is ranked third of all Local Government Districts, with an average rate of 56%. In comparison, Belfast City and Mid and East Antrim Borough Councils achieved average occupancy rates of 76% and 60% respectively.

5.53 The Borough's accommodation stock includes:

- 10 hotels;
- 6 guesthouses;
- 22 bed and breakfasts; and
- 14 self-catering units.

5.54 Figure 5.1 illustrates the distribution of tourist accommodation throughout the Borough. This incorporates accommodation that is currently registered with Tourism NI and detailed accordingly in their literature, and those locations that are not registered, but have been identified through research by the Planning Section.

**Figure 5.1: Tourist Accommodation in Antrim and Newtownabbey**




*Source: Antrim and Newtownabbey Borough Council*

**Visitor Accommodation**

5.55 In 2015, there were 2,419 rooms in certified accommodation available in the Borough offering 3,384 bed spaces. This equates to approximately 11% of all rooms available in Northern Ireland, and 8% of all bed spaces. Antrim and Newtownabbey's share of overall room provision in Northern Ireland has fallen slightly since 2011; however, this is likely to be due to recent marked expansion of high quality hotels and serviced-apartments in Belfast City Council area.

5.56 Table 5.1 outlines the accommodation room stock within each of the eleven Local Government Districts in Northern Ireland, and their ranking in the context of the Northern Ireland total provision.

**Table 5.1: Accommodation Room Stock by Local Government District (2015)**

| Local Government District | Rooms Available | % of Total Rooms Available | Rank |
|---|---|---|---|
| Antrim and Newtownabbey | 2,419 | 10.98% | 3 |
| Ards and North Down | 867 | 3.93% | 8 |
| Armagh City, Banbridge and Craigavon | 474 | 2.15% | 11 |
| Belfast City | 6,097 | 27.67% | 1 |
| Causeway Coast and Glens | 4,944 | 22.43% | 2 |
| Derry City and Strabane | 1,710 | 7.76% | 6 |
| Fermanagh and Omagh | 1,775 | 8.05% | 4 |
| Lisburn and Castlereagh City | 479 | 2.17% | 10 |
| Mid and East Antrim | 942 | 4.27% | 7 |
| Mid Ulster | 509 | 2.31% | 9 |
| Newry, Mourne and Down | 1,823 | 8.27% | 5 |
| Northern Ireland | 22,039 | 100% | |

*Source: Northern Ireland Local Government District Tourism Statistics, Department for the Economy/NISRA, July 2016*

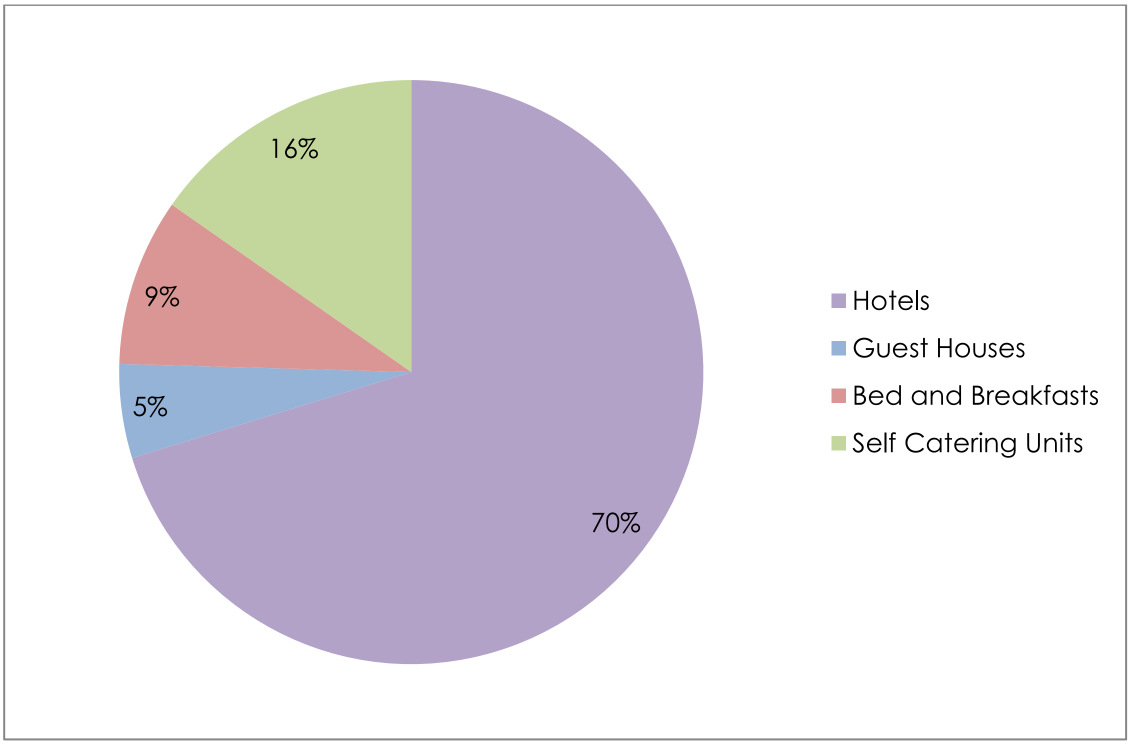
5.57 Based upon the number of accommodation rooms available, Antrim and Newtownabbey ranks in 3rd place with 2,419 rooms, whilst the sector is clearly dominated by Belfast City and Causeway Coast and Glens District Councils with 27.7% and 22.4% of the total room stock.

5.58 Within the Borough Tourist accommodation is provided through a broad range of hotels, guest houses, bed and breakfasts and self-catering units. Between 2012 and 2015 there have been changes to the overall composition of accommodation stock. Guest Houses, Bed &Breakfast and Self-Catering have all experienced slight decreases in terms of units, room and total bed spaces. Hotel provision has increased in terms of total stock and improved in respect of quality grading through the Tourism NI accreditation scheme.

5.59 Quality of stock is improving, and the number of hotels in the Borough has increased from 8 in 2012, to 10 in 2015. The number of 3* hotels has doubled to six in 2015 and there is an addition of a 2* hotel. The number of unclassified/awaiting grading fell over the same period from four to two.

5.60 The range of tourism accommodation types (in terms of available bed spaces) within the Borough in 2015 is shown in Figure 5.2 below.

**Figure 5.2: Tourist Accommodation by Available Bed Spaces (2015)**




*Source: Certified Tourism Stock, NISRA, 2015*

5.61 On average, tourist accommodation in the Borough offered 1.4 bed spaces per available room in 2015. This is below the average for Northern Ireland – 1.9 bed spaces per room. Guest houses provided the largest number of bed spaces per room (2.4), whilst self-catering accommodation offered the least (1.8). Hotels in the Borough offered 2.1 bed spaces per room whereas bed and breakfasts offer 2.2 bed spaces per room.

**Accommodation Occupancy**

5.62 With regard to room occupancy in the context of hotel provision, Antrim and Newtownabbey ranks in 3rd place out of all local government districts with a rate of 61%, which compares broadly to the Northern Ireland median, although this is distorted by Belfast City Council. Accommodation occupancy rates are dominated by Belfast City and Mid and East Antrim Borough Councils, where rates were 77% and 64% respectively.

5.63 In the context of bed and breakfast, guesthouses, and guest accommodation, occupany rates in the Borough are less favourable, with a rate of only 20%. This sector is dominated by provision in the more prominent tourist areas including Belfast, Mid Ulster, Causeway Coast and Glens, and Fermanagh-Omagh, Local Government Districts.

### Overnight stays, Night and Visitor Spend

5.64 Table 5.2 outlines the estimated overnight stays, overall number of nights stayed, and the expenditure attributed to these stays with regard to the eleven Local Government District in Northern Ireland. With regard to Antrim and Newtownabbey, it is estimated that there were approximately 204,290 overnight trips in the Borough, resulting in a total of 672,902 individual nights' accommodation. Approximately £32.4m This brought in excess of £34.2 million to the local tourism industry – equating to approximately 4% of the Northern Ireland total.

**Table 5.2: Estimated Overnight Trips, Nights and Expenditure by LGD (2015)**

| Local Government District | Overnight Trips | | Nights | | Expenditure | |
|---|---|---|---|---|---|---|
| | No. | % | No. | % | £m | % |
| Antrim and Newtownabbey | 204,290 | 4% | 672,902 | 4% | 34.2 | 4% |
| Ards and North Down | 376,755 | 8% | 1,397,895 | 9% | 51.0 | 7% |
| Armagh City, Banbridge & Craigavon | 149,449 | 3% | 562,866 | 4% | 22.5 | 3% |
| Belfast | 1,361,193 | 29% | 4,237,733 | 27% | 278.0 | 37% |
| Causeway Coast & Glens | 911,388 | 20% | 3,141,914 | 20% | 136.8 | 18% |
| Derry City and Strabane | 223,172 | 5% | 889,416 | 6% | 42.5 | 6% |
| Fermanagh and Omagh | 341,051 | 7% | 1,136,816 | 7% | 54.6 | 7% |
| Lisburn and Castlereagh | 130,924 | 3% | 714,336 | 5% | 24.9 | 3% |
| Mid and East Antrim | 382,224 | 8% | 1,007,755 | 7% | 45.6 | 6% |
| Mid Ulster | 155,708 | 3% | 613,667 | 4% | 22.3 | 3% |
| Newry, Mourne and Down | 404,442 | 9% | 1,056,896 | 7% | 47.7 | 6% |
| Northern Ireland | 4,640,596 | 100% | 15,432,195 | 100% | 760.1 | 100% |

*Source: Northern Ireland Local Government District Tourism Statistics, Department for the Economy/NISRA, July 2016*

5.65 It is estimated that £760 million was added to the Northern Ireland economy as a result of overnight trips. Expenditure in Belfast amounted to £278million, whilst £137million was spent in the Causeway Coast and Glens LGD. Together, these two areas accounted for 55% of the total tourist related expenditure in Northern Ireland.

### Tourism Jobs in Antrim and Newtownabbey

5.66 The NI Census of Employment, issued by the Department for the Economy in July 2014 advises that, in September 2013, employment associated with the tourism industry in the Borough amounted to 4,074 jobs, which accounts for 7% of the Northern Ireland total. This figure incorporates jobs in the following areas:

- Accommodation for visitors;
- Food, beverage serving activities;
- Transport; and
- Sporting and recreational activities.

5.67 Table 5.3 details the number of tourism related jobs throughout the eleven Local Government Districts, and with regard to Northern Ireland as a whole.

**Table 5.3: Tourism Employee Jobs by Local Government District 2013**

| Local Government District | Tourism Related Jobs | % of Northern Ireland Total |
|---|---|---|
| Antrim and Newtownabbey | 4,074 | 7.1% |
| Ards and North Down | 4,595 | 7.9% |
| Armagh City, Banbridge & Craigavon | 4,182 | 7.2% |
| Belfast | 17,319 | 29.8% |
| Causeway Coast & Glens | 4,751 | 8.2% |
| Derry City and Strabane | 4,227 | 7.3% |
| Fermanagh and Omagh | 3,448 | 5.9% |
| Lisburn and Castlereagh | 3,824 | 6.6% |
| Mid and East Antrim | 3,678 | 6.3% |
| Mid Ulster | 3,165 | 5.5% |
| Newry, Mourne and Down | 4,780 | 8.2% |
| Northern Ireland | 58,042 | |

Source: Northern Ireland Local Government District Tourism Statistics, Department for the Economy/NISRA, July 2016

**Tourist Attractions/Infrastructure in Antrim and Newtownabbey**
**Visitor Information Centres**

5.68 Visitor information centres are located at four places across the Borough and are all co-located with other visitor/cultural/retail services at Mossley Mill, Antrim's Old Court House, Junction One Retail Outlet and Leisure Park, and Randalstown Local Information office.

**Heritage & Historical Attractions**

5.69 The heritage sites of the Borough provide some of the most visited attractions of the Borough. The Industrial past features at Patterson's Spade Mill, Randalstown Viaduct and at Museum at the Mill, Mossley. Plantation of Ulster and modern Irish heritage attractions are found at the Green Flag Award winning Sentry Hill House, and Templeton Mausoleum and Monumental Gardens. Ancient Celtic and medieval heritage is offered at The White House in Newtownabbey, and Antrim Round Tower and Springfarm Rath, both of which are located in Antrim, with attractions relating to Christian heritage distributed throughout the Borough, including Cranfield Church and Donegore.

5.70 Antrim Town provides the Borough's key hub of heritage interest at Pogue's Entry Historical Cottage and Craft Studio, Barbican Gate, The Old Court House, and Antrim Castle Gardens and Clotworthy House.

**Natural Heritage & Nature Attractions**

5.71 Lough Neagh and Belfast Lough along with the Six Mile Water and Three Mile Water rivers provide a resource for nature and natural heritage based tourism. The Borough's waterside locations at Toome Canal, Six Mile Water Race, Three Mile Water Park, and Jordanstown Loughshore Park provide the most accessible nature opportunities for visitors. National Nature Reserves (NNRs) at

Randalstown Forest, Rea's Wood in Antrim, and the Lough Neagh Islands (incorporating) Ram's Island provide the most valuable assets as nature attractions in the Borough.

**Formal Open Gardens**

5.72 The Borough has three historic designed gardens with the Green Flag Award winning Antrim Castle Gardens & Clotworthy House being one of the most visited designed gardens in Northern Ireland. The Northern Ireland Visitor Attraction Statistics 2015, issued by the Department for the Economy and NISRA, details that this attraction ranked in 5$^{th}$ place with regard to the most visited country parks, parks, forests, and gardens. In 2015, approximately 0.4million people visited Antrim Castle Gardens and Clothworthy House – a 62% increase over the previous year.

**Children's Fun Parks, Open Farms and Animal Interests**

5.73 The Borough has five children's fun parks with the most popular located at Valley leisure Centre in V36. Animals and birds feature as three locations with the most popular at World of Owls at Randaslown. There are also three 'open farms' in the borough, Ballylagan Organic farm provides an all-round farm experience and accommodation, farm shop and farm practice experiences.

**Cultural & Arts Attractions**

5.74 Three theatres are located across the Borough provide almost 700 seats. The Courtyard Theatre is set in the landscaped gardens of Ballyearl Arts and Leisure Centre Newtownabbey. The 180 seat theatre offers a wide range of arts and entertainment throughout the year including drama, dance, comedy, musicals, family shows, concerts, community and amateur dramatics. The Old Courthouse in Antrim provides an independent film style Cineclub and has regular dance and music hall performances it also offers regular crafts and design events. Theatre at The Mill, a 400 seat auditorium, located at Mossley Mill, Newtownabbey offers live performances and a wide programme of musicals, dance, drama, comedy, concerts, family shows and workshops.

5.75 Exhibitions and gallery space is provided at the Museum at the Mill (Mossley Mill) and Clotworthy House (Antrim) also provides occasional exhibitions and gallery opportunities for visitors.

**Activity Tourism**

5.76 The most significant provision in the Borough is activity-based tourism with almost half all attractions of the Borough. Tourism NI maintains that activity-based tourism generally provides the most potential in growing visitor expenditure, longer visitor stay and more skilled jobs.

**Cycling and Walking**

5.77 The Borough has several cycling and walking routes of varying lengths; these either form part of, or link to, the Sustrans UK 'national cycle network'.

- *Antrim Town Loop* focuses in and around the centre of Antrim and the Lough shore linking heritage assets such as Clotworthy House with recreational attractions at Deer Park with the Town centre. The route is 5 miles long and is considered an easy graded route.
- *Lagan & Lough Cycle Way* is a 21 mile, level, mostly traffic free cycle ride or walk connecting Jordanstown with Belfast and Lisburn. The route is suitable for novice and family cyclists of all ages and abilities and passes along the waterside environment of the Lagan Towpath and Belfast Lough.
- *Lower Bann Cycle Trail* begins at Toome and links to Lough Beg before going on to Portglenone Forest, Coleraine and Castlerock. The total distance is approx. 44 miles from Toome to Castlerock and the route is having on-going upgrades in sections.
- *Loughshore Trail* is a continuous 128 mile cycle route around the shores of Lough Neagh and along Lough Beg, taking in 25 major sites of interest along the way including marinas, parks, nature reserves and local sites of archaeological and historical interest, taking in Shane's Castle, Antrim Lough Shore and Randalstown Arches. The Trail uses mainly quiet country lanes and is almost entirely all flat terrain. Also known as Route 94 of the National Cycle Network, the trail is clearly signposted with blue cycle way signs.
- *Newtownabbey Way*, a green flag winner, is a relatively new route and is contained entirely within the Borough. It forms part of Route 93 of the National Cycle Network and extends from Global Point at Corrs Corner to the shores of Belfast Lough via Mossley Mill, and through Threemile Water Park, to Monkstown and Whiteabbey.

5.78 There are currently no cycle hire facilities in the Borough, nor are there any mountain bike or trail bike courses.

**Fishing & Angling**

5.79 Lough Neagh, the largest freshwater lake in the British Isles, provides a substantial offer for coarse angling. Toome Canal is a popular coarse fishery where Pike, Perch, Roach and Bream are abundant. Mossley Mill Dam, Lough Beg, and the Six Mile Water in Antrim also provide locations for licenced anglers.

5.80 There are four commercial facilities in the Borough providing fishing opportunities for tourists, these located close to Randalstown, (Craigmore

Fishery and Creeve Trout Fishery), and in the Ballyclare area (Straid Fishery and Tildarg Fishery).

**Golf**

5.81 The Borough has seven golfing facilities that provide a range of nine hole, eighteen hole, natural range and golf driving range facilities. The facilities available are both membership and 'pay as you use' suitable for tourists. Antrim and Newtownabbey Borough has a sizeable resource for facilitating golf tourism with high quality golf courses such as Hilton Templepatrick, golf hire facilities at several of these sites and golf tours that now operate from Belfast International Airport across Northern Ireland.

**Watersports and Boating**

5.82 Boat tours and day (summer) cruises operate from Toome, Antrim Lough Shore with the Abháinn Cruises Scenic Boat Tours at Toome and the Maid of Antrim and Island Warrior Tours operating from Antrim and Sandy Bay Marina (Glenavy) respectively. Antrim Boat Club provides a significant watersports facility, which is soon to be joined by a new visitor centre. The Gateway Visitor Centre, a £2.3million investment at Antrim Lough Shore, will incorporate flexible activity space at ground floor level that will cater for a variety of activities and events, whilst the first floor will facilitate a new dining area with view over Lough Neagh. In addition, the new centre will provide a new operational base for Lough Neagh Rescue.

**Adventure and Motorised Sport**

5.83 Outdoor challenge adventure sites at Escarmouche, Randalstown and Breckenhill Outdoor Centre in Doagh provide facilities for visitors. A range of motor racing facilities are provided at Nutt's Corner and Need for Speed in Doagh. Nutt's Corner Circuit is Northern Ireland's highest standard karting venue with a track measuring over 2 kilometres.

**Equestrian**

5.84 The Borough has at least five equestrian centres that provide a range of activities from beginner lessons and trekking to visitors. These include:

- Beeches Equestrian Centre, Ballyclare;
- Ballyclare Equestrian Centre, Ballyclare;
- Connell Hill Riding Centre, Antrim;
- Laurel View Equestrian Centre, Templepatrick; and
- MacKenzie's Riding School, Antrim.

**Visitors to Tourist Attractions in Antrim and Newtownabbey**

5.85 Table 5.4 details the number of main tourist attractions in the eleven Local Government Districts in Northern Ireland, and their respective number of visitors. Between 2014 and 2015, the number of tourist attractions in Northern Ireland increased from 188 to 225 (an increase of almost 20%), and the number of visitors to these attractions increased by some 14% from 15.3million to 17.5million. With regard to the Borough in particular, there was a slight decrease in the number of tourist attractions (2), however, the number of visitors increased by almost 27% from 0.4million in 2014 to 0.5million in 2015. This increase is an indication of the growing appeal of the Borough to tourists and other visitors, through raised awareness of the range of facilities in Antrim and Newtownabbey.

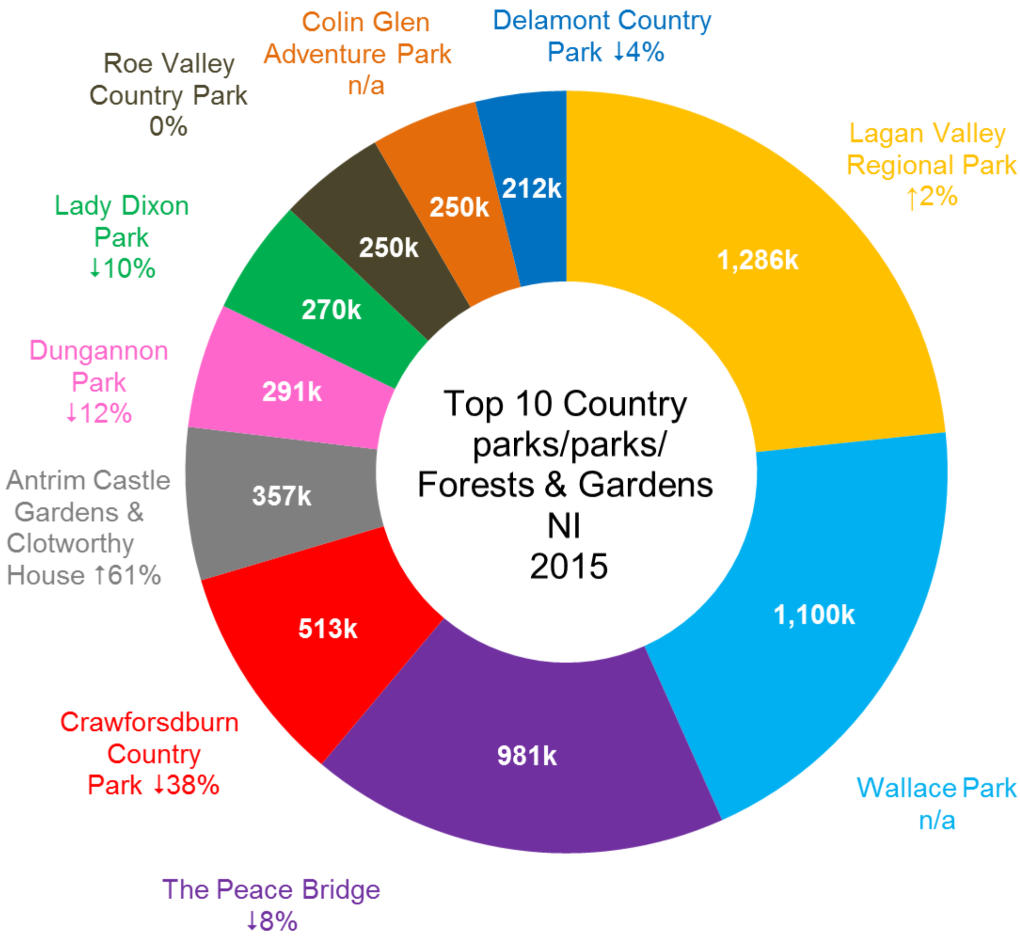
**Table 5.4: Number of Visitor Attractions and Visitors by LGD (2014-2015)**

| Local Government District | 2014 | | 2015 | |
|---|---|---|---|---|
| | Venues | No. of Visitors | Venues | No. of Visitors |
| Antrim and Newtownabbey | 11 | 352,966 | 9 | 448,886 |
| Ards and North Down | 16 | 1,029,117 | 21 | 1,559,790 |
| Armagh City, Banbridge & Craigavon | 29 | 2,414,290 | 33 | 1,809,898 |
| Belfast | 21 | 4,066,914 | 35 | 4,824,897 |
| Causeway Coast & Glens | 19 | 1,817,164 | 23 | 2,104,094 |
| Derry City and Strabane | 20 | 2,165,027 | 27 | 2,122,480 |
| Fermanagh and Omagh | 21 | 941,604 | 20 | 932,104 |
| Lisburn and Castlereagh | 9 | 310,366 | 11 | 1,654,075 |
| Mid and East Antrim | 15 | 527,300 | 15 | 550,910 |
| Mid Ulster | 7 | 164,981 | 10 | 134,126 |
| Newry, Mourne and Down | 20 | 1,534,991 | 21 | 1,339,666 |
| Northern Ireland | 188 | 15,324,750 | 225 | 17,480,926 |

*Source: Northern Ireland Local Government District Tourism Statistics, Department for the Economy/NISRA, July 2016*

5.86 The most popular attractions to visit in Northern Ireland fall into the category of 'Country Parks/Parks/Forests and Gardens'. This category accounted for 47% of all visitors to attractions in 2015 with approximately 5.5million people travelling to such locations. As Figure 5.3 shows, of the top ten attractions in this category, Antrim and Newtownabbey has one site, namely Antrim Castle Gardens and Clothworthy House, which attracted approximately 357,000 visitors in 2015, representing a 61% increase on the previous year – and ranked in 5$^{th}$ place in its category in the context of Northern Ireland.

**Figure 5.3: Top 10 Country Parks, Parks, Forests and Gardens in NI (2015)**




Source: *Northern Ireland Local Government District Tourism Statistics, Department for the Economy/NISRA, July 2016*

### Key Findings

5.87 The evidence presented in this section has led to the identification of the following key findings:

- Tourism can make an important contribution to the economy, society and environment, both locally and regionally, particularly where tourism facilities and associated infrastructure can be introduced or enhanced.
- The Regional Development Strategy promotes a sustainable approach to the provision of tourism infrastructure in order to deliver economic benefits.
- The SPPS advises that a tourism strategy should form part of the Local Development Plan, and that it should reflect wider regional tourism initiatives, and should address the following issues:
    - How future tourism demand is best accommodated;
    - Safeguarding of key tourism assets;
    - Identification of potential tourism growth areas;

- Environmental considerations; and
- Contribution of tourism to economic development, conservation and urban regeneration.

- A new Regional Tourism Strategy for Northern Ireland is being prepared by the Department of the Economy, once published; this should be taken account of in the emerging Local Development Plan.
- Approximately 11% of Northern Ireland's total accommodation room stock is located in the Borough – the third highest of all the LGDs.
- In 2015, the tourism industry was worth £34.2million to the local and regional economy.
- Tourism-related jobs accounted for 7% of the Borough's workforce (4,074 jobs).
- The number of people visiting the Borough has increased substantially over the past number of years, as awareness of attractions, and promotion of locations increases.
- Antrim Castle Gardens and Clotworthy House is the Borough's most visited attraction, with over 357,000 visitors in 2015, an increase of 61% from 2014.

**Next Steps**

5.88 Further research will be required to ensure a detailed knowledge base regarding the tourism offer within the Borough. This will include tourist accommodation, attractions, and activities throughout the Borough. In addition, it will be necessary to liaise with the Department of the Economy with regard to the forthcoming Regional Tourism Strategy. As the forthcoming Tourism Strategic Plan (2016-2020) will form a crucial part of the evidence to inform the Local Development Plan, it will be necessary to work closely with Council officials to ensure full awareness of any tourism strategies and/or initiatives.

# 6 Agriculture, Fishing and Forestry

6.1 This section relates to the topic of Agriculture, Fishing and Forestry, and identifies, collates, and discusses evidence comprising:

- Regional Policy Context;
- Existing Development Plans and Operational Planning Policy;
- Other Relevant Strategies/Legislation;
- Agriculture
- Fishing
- Forestry
- Key Findings
- Next Steps

6.2 The agriculture, fishing and forestry industries make a significant contribution to the Northern Ireland economy. The Department for Agriculture and Rural Development (DARD) recently calculated that 82% of Northern Ireland land is used for agriculture and forestry (DARD Rural Development Programme 2014-2020). Agriculture, fishing and forestry can have significant impacts on the countryside and plans must recognise the need for a sustainable approach.

6.3 Agriculture is one of Northern Ireland's most important industries. The agri-food industry turns over more than £4.5 billion every year, and supports one in eight jobs in the UK, making it a cornerstone of Northern Ireland's economy with farmers playing a key role in this.

6.4 The main commercial fishing focus within the Borough is at Lough Neagh. The Lough Neagh Fishermen's Co-operative Society has controlled the catching and marketing of eel and scale fish (including pollen) on the Lough since 1992. The Co-operative owns the fishing rights for the Lough. DCAL is responsible for the conservation and protection of fish stocks and for enforcing fisheries legislation on Lough Neagh. The industry is a key local employer with significant international exports.

6.5 Forests ecosystems are economically and environmentally valued in Northern Ireland. They provide a range of natural renewable products i.e. wood, gums, oils and waxes and they help to conserve and enrich the environment.

**Regional Policy Context**

**Everyone's Involved – Sustainable Development Strategy**

6.6 One of the six Priority Areas for Action outlined in the SDS relates to 'striking an appropriate balance between the responsible use and protection of natural resources in support of a better quality of life and a better quality environment'. This promotes sustainable land and marine management, better planning and management of development in ways which are sustainable and which contribute to creating a better environment. The SDS recognises that whilst we must continue to respect the limits of our natural resources and ensure a high level of protection, sustainable development should not prevent us from using or capitalising on these resources.

**Regional Development Strategy 2035**

6.7 With regard to Regional Guidance (RG) and Spatial Framework Guidance (SFG), the RDS encourages the facilitation of the development of rural industries, businesses and enterprises in appropriate locations. SFG 13 acknowledges that farming plays a major part in sustaining rural community networks, as employers, consumers and producers. It further advises that forestry and fishing also contribute to communities, in employment and commercial terms, as well as in terms of recreation opportunities. The protection of soils is a key component of RG 9, which aims to reduce Northern Ireland's carbon footprint, whilst mitigating and adapting to climate change. The Strategy therefore acknowledges the need to manage soils, protect peat habitats, and safeguard soils in urban areas.

**Strategic Planning Policy Statement for Northern Ireland (2015)**

6.8 Whist the issues of agriculture, fishing and forestry are not guided by a specific subject policies within the SPPS, they are covered by a number of subject policies such as:

- Development in the Countryside;
- Natural Heritage; and
- Economic Development, Industry and Commerce.

6.9 With particular regard to Development in the Countryside, the SPPS clarifies that the following strategic policies for non-residential development should be taken into account in the preparation of the LDP:

- **Farm diversification**: provision should be made for a farm diversification scheme where the farm business is currently active and established (for a minimum 6 years) and, the proposal is to be run in conjunction with the agricultural operations of the farm. Proposals must involve the re-use or adaptation of existing buildings, with new buildings only being acceptable in exceptional circumstances;
- **Agriculture and forestry development**: provision should be made for development on an active and established (for a minimum 6 years) agricultural holding or forestry enterprise where the proposal is necessary for the efficient operation of the holding or enterprise. New buildings must be sited beside existing farm or forestry buildings on the holding or enterprise. An alternative site away from existing buildings will only being acceptable in exceptional circumstances; and,

- **The conversion and re-use of existing buildings for non-residential use**: provision should be made for the sympathetic conversion and re-use of a suitable locally important building of special character or interest (such as former school houses, churches and older traditional barns and outbuildings) for a variety of alternative uses where this would secure its upkeep and retention, and where the nature and scale of the proposed non-residential use would be appropriate to its countryside location.

6.10 In terms of Economic Development, Industry and Commerce, the SPPS reminds us that the planning system has a key role in achieving a vibrant economy, and this should be facilitated in ways consistent with the protection of the environment and the principles of sustainable development. SPPS policies which should be taken into account in the preparation of the LDP include:

> *'The guiding principle for policies and proposals for economic development in the countryside is to facilitate proposals likely to benefit the rural economy and support rural communities, while protecting or enhancing rural character and the environment, consistent with strategic policy elsewhere in the SPPS.'*

**Existing Development Plans and Operational Planning Policy**

6.11 The Antrim Area Plan includes a chapter on agriculture and forestry. It mentions agriculture as being the basis of the District's rural economy, and acknowledges the significance of 'Greenmount Agricultural College' (now College of Agriculture, Food and Rural Enterprise [CAFRE], Greenmount Campus). The Plan discusses Randalstown and Tardree forests. Fisheries are only mentioned in relation to the impact of pollution from the minerals industry.

6.12 The Belfast Metropolitan Area Plan, in its Plan Strategy and Framework, acknowledges the importance of agriculture to the rural economy, and as being a significant factor in shaping and maintaining landscapes. It also mentions bodies which manage forestry operations, and the importance of forests for recreation purposes. The Plan Strategy and Framework also briefly mentions recreational and commercial fishing. The District Proposals document for Newtownabbey explains how Rural Landscape Wedges are to be primarily used for agricultural purposes.

6.13 Current Operational Planning Policy with regard to agriculture, fishing and forestry is contained within Planning Policy Statement 4: Planning and Economic Development (PPS 4) and Planning Policy Statement 21: Sustainable Development in the Countryside (PPS 21). Until a new Plan Strategy is adopted by Council, transitionary measures allow for the retention of the current provisions contained within existing operational planning policy.

6.14 PPS 4 sets out planning policies for economic development and indicates how growth associated with such uses can be accommodated and promoted in Development Plans. It seeks to facilitate and accommodate economic growth in ways compatible with social and environmental objectives and sustainable development.

6.15 Operational planning policies within PPS 4, in the context of agriculture, fishing and forestry, relate to:

- Policy PED 2 – Economic Development in the Countryside;
- Policy PED 3 – Expansion of an Established Economic Development Use in the Countryside;
- Policy PED 4 – Redevelopment of an Established Economic Development Use in the Countryside
- Policy PED 5 – Major Industrial Development in the Countryside; and
- Policy PED 9: General Criteria for Economic Development.

6.16 The primary aim of PPS 21 is to manage development in the countryside in a manner which strikes a balance between the need to protect the countryside from unnecessary or inappropriate development, whilst supporting rural communities. It sets out planning policies and main planning considerations in assessing proposals for development in the countryside.

6.17 Operational planning policies within PPS 21, in the context of this topic, relate to:

- Policy CTY 1 – Development in the Countryside;
- Policy CTY 10 – Dwellings on Farms;
- Policy CTY 11 – Farm Diversification;
- Policy CTY 12 – Agricultural and Forestry Development;
- Policy CTY 13 – Integration and Design of Buildings in the Countryside;
- Policy CTY 14 – Rural Character;
- Policy CTY 15 – The Setting of Settlements; and
- Policy CTY 16 – Development Relying on Non-Mains Sewerage.

6.18 A strategic level review of operational planning policy is examined further in the Policy Review Evidence Paper.

**Other Relevant Strategies/Legislation**
**DARD Strategic Plan 2012-2020 (2013)**

6.19 This Plan sets four goals, which are as follows;

| | |
|---|---|
| **Goal 1** | To help the agri-food industry prepare for future market opportunities and economic challenges. |
| **Goal 2** | To improve the lives of farmers and other rural dwellers targeting |

| | |
|---|---|
| | resources where they are most needed. |
| **Goal 3** | To enhance animal, fish and plant health and animal welfare on an all-Ireland basis. |
| **Goal 4** | To help deliver improved sustainable environmental outcomes. |

6.20 Each of the above goals has a set of key actions which set out how they will be achieved.

6.21 It is worth noting that Goal 4 (stemming from the previous version of the Strategic Plan) was behind the introduction of Northern Ireland Countryside Management Scheme (NICMS). The Scheme categorised farmland habitats and features, and aimed to maintain and enhance biodiversity, to improve water quality, and to enhance landscape and heritage features by integrating their management into everyday workings of the farm. This Scheme was opened to all farmers and land managers with a trading DARD Farm Business Number and at least three hectares of eligible land. The Single Farm Payment was replaced in 2015 to the Basic Payment Scheme. To process claims, Land Parcel Identification System (LPIS) maps were produced by DARD and LPS. These maps may provide data on levels and categories of agricultural land, etc. within the Borough.

**Rural Development Programme 2014-2020 (2015)**

6.22 Published by DARD and adopted by the European Commission, this strategy follows on from the above Strategic Plan 2012-2020 to provide a broad strategic context for rural policy which takes account of the aims and objectives of the RDS. It focuses mainly on preserving and enhancing ecosystems, local development in rural areas and increasing the competitiveness of the agri-food sector.

**Agriculture**

**Farm Businesses in Northern Ireland and Antrim & Newtownabbey**

6.23 The Agricultural Census 2015 defines a farm as:

> *"A single unit, both technically and economically, which has a single management and which produces agricultural products"*.

6.24 Currently, there are 24,907 farms in Northern Ireland producing the wide variety of raw materials needed by processors and retailers to meet the demands of consumers.

6.25 According to the latest Census publication (January 2016), there were 890 farms operating in the Borough representing 3% of all farms in Northern Ireland.

6.26 Table 6.1 shows that, of the 890 farms in the Borough, 617 were classified as very small; 135 were small; 48 medium; and 90 large. In comparison to the other Councils we have a relatively low count of farms for the year 2015 ranking overall 8th place.

**Table 6.1: Number of Farms by Farm Business Size and LGD in Northern Ireland, (June 2015)**

| Council | Very Small | Small | Medium | Large | Total |
|---|---|---|---|---|---|
| Antrim & Newtownabbey | 617 | 135 | 48 | 90 | 890 |
| Armagh, Banbridge & Craigavon | 2,397 | 379 | 181 | 289 | 3,246 |
| Belfast | 21 | 3 | 2 | 2 | 28 |
| Causeway Coast & Glens | 1,712 | 393 | 168 | 244 | 2,517 |
| Derry & Strabane | 1,271 | 251 | 82 | 131 | 1,735 |
| Fermanagh & Omagh | 4,262 | 505 | 209 | 157 | 5,133 |
| Lisburn & Castlereagh | 627 | 94 | 49 | 91 | 861 |
| Mid & East Antrim | 1,310 | 264 | 102 | 130 | 1,806 |
| Mid Ulster | 3,227 | 466 | 243 | 219 | 4,155 |
| Newry, Mourne & Down | 3,190 | 371 | 123 | 157 | 3,841 |
| North Down & Ards | 444 | 90 | 42 | 119 | 695 |
| Total | 19,078 | 2,951 | 1,249 | 1,629 | 24,907 |

*Source: Agricultural Census 2015, DARD*

6.27 Almost all farm businesses in Northern Ireland are owned and operated either by an owner-occupier or by a family partnership. Agricultural labour data is presented for owners, spouses and other workers on a full-time and part-time basis. The long term trend in Northern Ireland shows declining numbers in all labour categories particularly full-time farmers. These trends are a reflection of the overall decline in the number of farms and greater reliance on part-time labour.

6.28 Table 6.2 highlights the Borough's agricultural labour force for the period 2013-2015. It is evidently clear that employment figures are a reflection of the total number of active farms within our Borough. At present 1,853 persons are employed within the agricultural labour force, which represents 3.8% of Northern Ireland's labour force.

**Table 6.2: Agricultural Labour in relation to Farms Numbers in Antrim and Newtownabbey**

| | 2013 | 2014 | 2015 |
|---|---|---|---|
| **Total No. of Agricultural Labour** | 1,879 | 1,833 | 1,853 |
| **Total No. of Farms** | 874 | 862 | 890 |

***Source:*** *Agricultural Census 2015 DARD*

6.29 Table 6.3 provides an overview of livestock numbers in the Borough as detailed in the Agricultural Census 2015.

**Table 6.3: Livestock Numbers in Antrim and Newtownabbey (2015)**

| | Cattle | Sheep | Pigs | Poultry |
|---|---|---|---|---|
| **2015** | 78,784 | 70,107 | 23,951 | 1,028,000 |

*Source:* *Agricultural Census 2015 DARD*

*Notes:* *Cattle figures sourced from APHIS.*
*Pig figures sourced from the Northern Ireland Annual Inventory of Pigs.*
*Poultry figures sourced from the Northern Ireland Bird Register Update.*

6.30 Figure 6.1 details the number of farms by farm type throughout the eleven Local Government Districts in Northern Ireland. With regard to Antrim and Newtownabbey, the most prominent farm type consists of cattle and sheep grazing on lowland areas and primarily on Less Favoured Areas (LFA). The term LFA is used to describe those parts of the country which, because of their relatively poor agricultural conditions, have been so designated under EU legislation.

**Figure 6.1: Number of farms by farm type, 2015**

| | Farm type | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ***District Council*** | Cereals | General cropping | Horti-culture | Pigs | Poultry | Dairy | Cattle & Sheep LFA | Cattle & Sheep lowland | Mixed | Others | Total |
| Antrim and Newtownabbey | 8 | 14 | 9 | 10 | 29 | 112 | 387 | 288 | 19 | 14 | **890** |
| Armagh, Banbridge and Craigavon | 57 | 86 | 163 | 28 | 78 | 384 | 1,049 | 1,229 | 139 | 33 | **3,246** |
| Belfast | 2 | 1 | 1 | 0 | 0 | 1 | 17 | 5 | 1 | 0 | **28** |
| Causeway Coast and Glens | 33 | 62 | 12 | 12 | 66 | 331 | 1,316 | 577 | 91 | 17 | **2,517** |
| Derry and Strabane | 22 | 37 | 5 | 15 | 16 | 199 | 1,229 | 174 | 33 | 5 | **1,735** |
| Fermanagh and Omagh | 4 | 66 | 10 | 15 | 69 | 537 | 4,275 | 127 | 18 | 12 | **5,133** |
| Lisburn and Castlereagh | 38 | 26 | 23 | 7 | 19 | 104 | 224 | 354 | 46 | 20 | **861** |
| Mid and East Antrim | 2 | 30 | 11 | 13 | 74 | 214 | 1,126 | 288 | 32 | 16 | **1,806** |
| Mid Ulster | 27 | 82 | 17 | 49 | 200 | 456 | 2,285 | 913 | 111 | 15 | **4,155** |
| Newry, Mourne and Down | 41 | 67 | 24 | 31 | 44 | 274 | 2,544 | 718 | 63 | 35 | **3,841** |
| North Down and Ards | 47 | 45 | 18 | 5 | 6 | 130 | 45 | 341 | 35 | 23 | **695** |
| Total | **281** | **516** | **293** | **185** | **601** | **2,742** | **14,497** | **5,014** | **588** | **190** | **24,907** |

***Source:*** *Agricultural Census 2015 DARD*

6.31 Agri-environment schemes encourage farmers and landowners to manage their land to benefit the environment by integrating sustainable environmental management into the everyday workings of the farm.

6.32 At the end of 2011, 444,000 hectares of land in Northern Ireland were under agri-environment schemes, managed through the Northern Ireland Countryside Management Scheme (NICMS), the Environmentally Sensitive Areas Scheme (ESAS) and the Organic Farming Scheme (OFS).

6.33 This represents approximately 41% of the total farmed land, down from 43% in 2010. The quantity of land in agri-environment schemes has remained fairly constant since 2006, and has more than doubled since 2001.

### Extent of Agricultural Land

6.34 Land used by agriculture accounts for 76% of Northern Ireland's total land area. According to the DARD Agricultural Census 2015, the total area farmed within the Borough (including crops, grassland and rough grazing) amounted to 41,856 hectares (Ha). This represents 4% of the total area cropped in Northern Ireland. Table 6.4 clearly shows a decline of 228 Ha of total area farmed within the Borough from 2013 until 2015.

**Table 6.4: Total of cropped areas in Hectares (Ha)**

| | 2013 | 2014 | 2015 |
|---|---|---|---|
| TOTAL AREA FARMED (including grasslands and rough grazing) | 42,084 Ha | 42,082 Ha | 41,856 Ha |

*Source: Agricultural Census 2015 DARD*

6.35 The Agricultural census 2015 reveals that across our Borough 54% of farms are located in Less Favoured Areas (LFA) of which 38% are located in Disadvantaged Areas (DA) and 16% located in Severely Disadvantaged Areas (SDA).

**Figure 6.2: Number of Farms in Less Favoured Areas in Antrim and Newtownabbey**

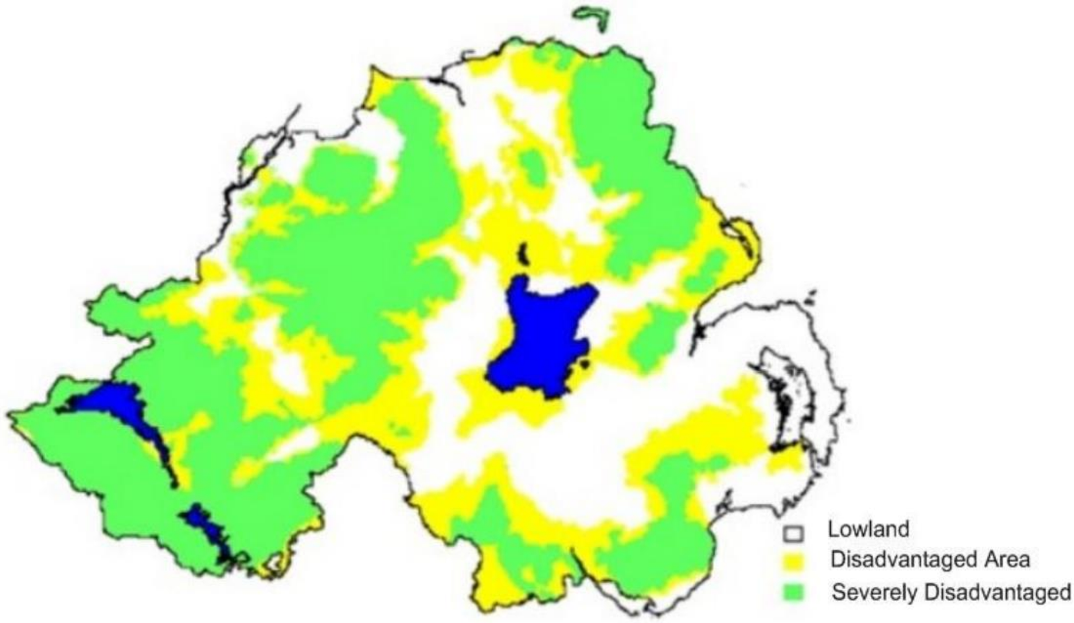
| District Council | Number of farms: Mainly SDA | Mainly DA | Mainly LFA | Mainly non-LFA | Total | Percentage distribution: Mainly SDA | Mainly DA | Mainly LFA | Mainly non-LFA | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| Antrim and Newtownabbey | 144 | 336 | 480 | 410 | **890** | 16 | 38 | 54 | 46 | **100** |

*Source: Agricultural Census 2015 DARD*

6.36 Designation of Less Favoured Area (LFA) status requires identification of adverse factors, including land quality, and to farms in a designated region, attracts specific EU payments. Figure 6.3 provides an indication Northern Ireland's Less Favoured Areas.

6.37 The Borough is located primarily on lowlands east of Lough Neagh with pockets of disadvantaged and severely disadvantaged areas to the North and South East.

**Figure 6.3: Less Favoured Areas in Northern Ireland**




*Source: Agri-Food and Biosciences Institute (AFBI)*

6.38 Farmers in Less Favoured Areas (LFA) usually face significant challenges deriving from factors such as remoteness, difficult topography and poor soil conditions. These farmers tend to have fewer farming alternatives, lower farm productivity and often have higher unit production costs compared to farmers in lowland.

6.39 The Less Favoured Areas Compensatory Allowances Scheme (LFACAS) is a compensation measure to support farmers in naturally less favoured areas in Northern Ireland. The scheme's objective is to improve the environment and the countryside by supporting land management aid.

6.40 Cattle based or mixed grazing systems in Less Favoured Areas is favoured to maintain and achieve maximum levels of biodiversity. Controlled grazing by cattle helps maintain biodiversity and the ecological stability of upland pastures.

### Quality of Agricultural Land

6.41 The suitability of land for agriculture in Northern Ireland has been classified according to the Agricultural Land Classification (ALC) developed in England and Wales. The classification takes into account climate, site and soil characteristics and provides a nationally consistent and recognised method for assessing the potential productiveness of agricultural land. The grades range from 1 (excellent) to 5 (very poor) as seen in Table 6.5.

**Table 6.5: Agricultural Land Classification**

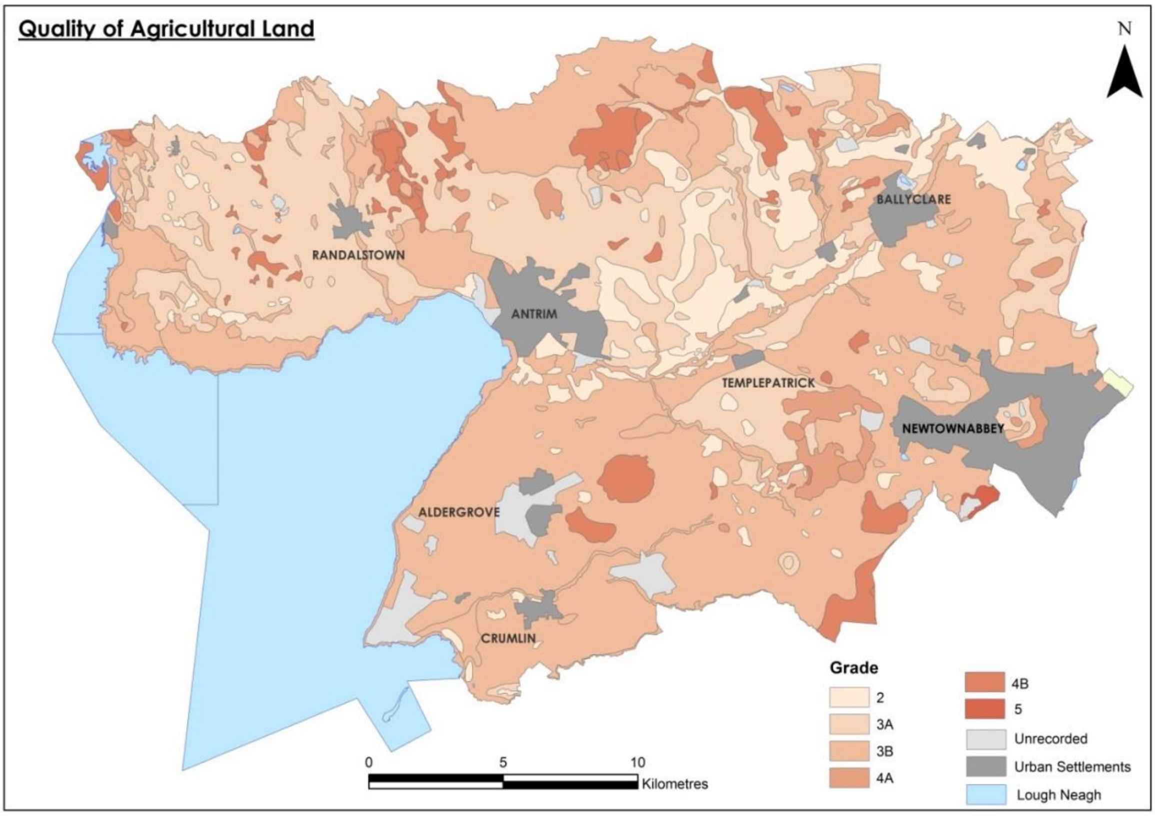
| Grade | Description |
|---|---|
| **1** | **Excellent quality** land with little or no limitations to agricultural use. A wide range of agricultural and horticultural crops can be grown producing high yields that are less variable compared to those on land of lower quality. |
| **2** | **Very good quality** land with minor limitations which affect crop yield, cultivations or harvesting. A wide range of agricultural and horticultural crops can usually be grown however there may be reduced flexibility due to difficulties with the production of the more demanding crops. The level of yield is generally high but may be lower or more variable than Grade 1. |
| **3** | **Good-Moderate quality** land with moderate limitations. The choice of crops, timing and type of cultivation, harvesting or the level of yield may be affected. Where more demanding crops are grown yields are generally lower or more variable than on land in Grades 1 and 2. |
| **3A** | **Good quality** land capable of consistently producing moderate to high yields of a narrow range of arable crops, i.e. cereals, grass, oilseed rape, potatoes, sugar beet and the less demanding horticultural crops. |
| **3B** | **Moderate quality** land capable of producing moderate yields of a narrow range of crops, i.e. cereals and grass or lower yields of a wider range of crops or high yields of grass which can be grazed or harvested over most of the year. |
| **4A/B** | **Poor quality** agricultural land with severe limitations, restricting the range of crops and/or level of yields. The land is suited to grass with occasional arable crops. Very droughty arable land is also included in this grade. |
| **5** | **Very poor quality** agricultural land with very severe limitations, restricting usage to permanent pasture or rough grazing. |

*Source: Agricultural Land Classification of England & Wales, Ministry of Agriculture, Fisheries & Food (MAFF), 1988.*

6.42 Figure 6.4 shows the quality of agricultural land within our Borough. Grade 2 (very good) agricultural land runs eastwards from Antrim into Parkgate, Doagh and Ballyclare. This land mimics the course of the Six Mile Water which alluvial deposits have contributed towards its rich brown soils.

6.43 Grade 3A (good quality) land is located North of Borough i.e. Toome, Cranfield and Randalstown. Lands located South of Antrim are considered class 3B due to their low lying landscape and proximity to Lough Neagh. Soils in these areas tend to be clayey texture with limited drainage and therefore considered Less Favoured Areas for agricultural activity.

**Figure 6.4: ALC data for Antrim and Newtownabbey**




*Source: Agri-Food and Biosciences Institute (AFBI)*

6.44 Very poor agricultural lands are found north of the Borough where peat soil types are present.

**Soil Quality**

6.45 Soil is important for the role it plays both in supporting agriculture and in forming important natural habitats. Degradation of the soil resource threatens both these interests.

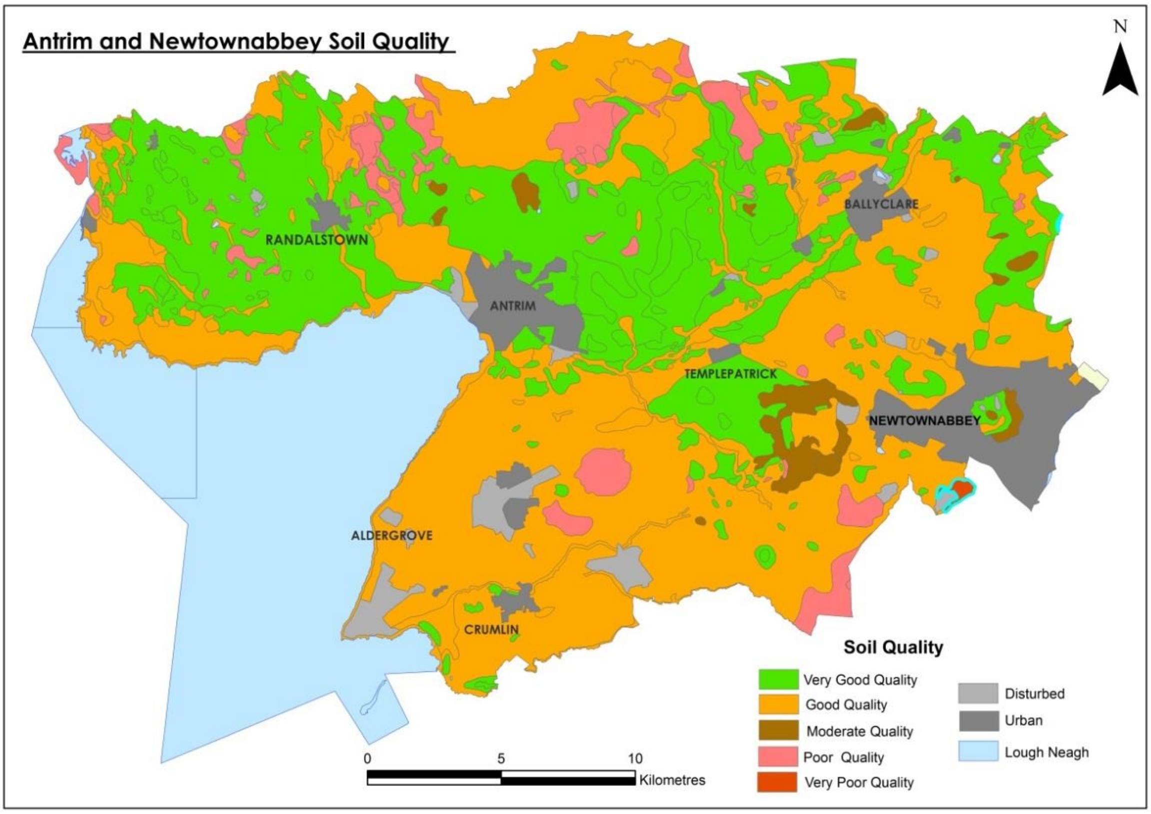
6.46 Soil quality is defined as:

> *"the capacity of a specific kind of soil to function, within natural or managed ecosystem boundaries, to sustain plant and animal productivity, maintain or enhance water and air quality, and support human health and habitation"*[3] *(Karlen et al., 1997).*

6.47 The soil quality within our Borough is shown in Figure 6.5. Overall the Borough's soil is rated of very good and good quality.

[3] *Karlen, D. L. et al. (1997). "Soil Quality: A Concept, Definition, And Framework For Evaluation (A Guest Editorial)". Soil Science Society of America Journal 61.1 (1997): 4*

**Figure 6.5: Soil Quality in Antrim & Newtownabbey**




*Source: Agri-Food and Biosciences Institute (AFBI)*

## Fishing

6.48 Northern Ireland's fishing industry is mainly concentrated in three fishing ports on the east coast of County Down: Ardglass, Kilkeel and Portavogie. Based on 2014 figures from the UK Sea Fisheries Statistics 832 fishermen are employed in Northern Ireland's fishing industry. The total value of fish landed by UK vessels amounted to £24.8 million in 2014.

6.49 Although these main fishing ports are outside of our Borough the main commercial fishing focus within our district is eel fishing primarily at Lough Neagh. The industry is a major local employer with significant international exports and is worth approximately £3.2m to the Northern Ireland's rural economy. Lough Neagh is the largest freshwater lake on the Island of Ireland covering an extensive area of 392 square kilometres, and is the source of much of Northern Ireland's fresh water supplies.

6.50 Lough Neagh is home to the only stable population of Irish pollan as well as European eels that spawn in the Sargasso Sea, and landlocked populations of salmon. Lough Neagh is also home to many bird species, and has been designated as a RAMSAR site, Area of Special Scientific Interest (ASSI) and Special Protection Area (SPA) because of its international importance for overwintering wildfowl.

6.51 Commercial eel fishing has been owned, maintained and managed by the Lough Neagh Fisherman's Co-operative Society since 1971. The Co-operative owns the fishing rights for the Lough with DCAL holding responsibility or the conservation and protection of fish stocks and enforcing fisheries legislation.

6.52 The European Eel Regulation (EC) No. 1100/2007 requires Eel Management Plans (EMP) to manage and recover eel stocks within the Neagh/Bann River Basin district. The EMP for Neagh/Bann 2010 outlines a number of restrictions and regulations regarding eel fishing within the management areas.

6.53 DCAL are responsible for the development and improvement of fisheries in NI. DCAL Licences are split into categories Game and Coarse. Game species include Brown Trout, Sea Trout, Salmon, and Arctic Char. Coarse species include Pike, Bream, Roach, Perch, Carp, Tench and Rudd. The Borough has one DCAL Public Angling Estate coarse fishery, located on the Toome Canal. There are no DCAL Public Angling Estate game fisheries in the Borough.

6.54 Other notable commercial fisheries are Glen Oak Fishery (stocking trout), Crumlin, which has been operating since 1977, and Otterburn Trout Farm, Randalstown, which has been operating since 1976.

6.55 In addition to commercial fishing the Borough supports recreational fishing activities namely coarse, game and trout fishing. There are a number of privately stocked lakes and reservoirs within our Borough that support these recreational fishing activities as seen in Table 6.6. A Fisheries Conservancy Board Rod Licence is required by anyone aged 12 or over for all fishing. This licence is in addition to a permit to fish particular stretches of water.

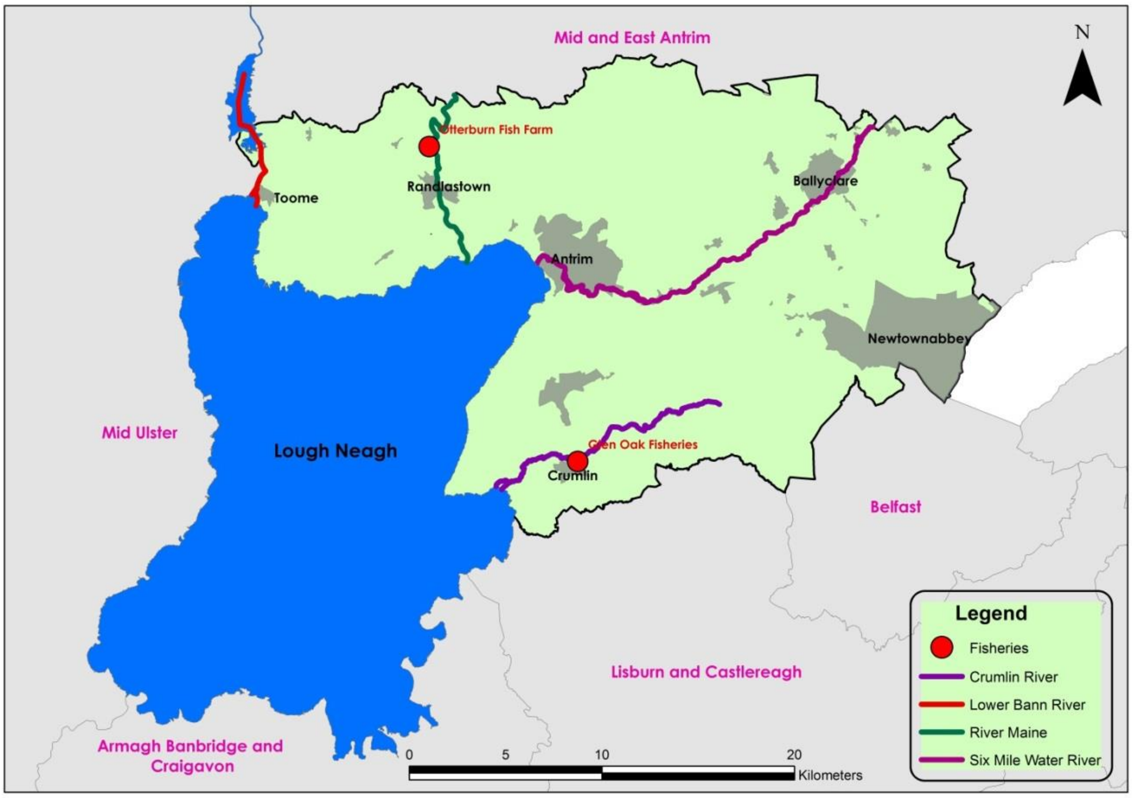
**Table 6.6: Privately Owned Fisheries & Reservoirs**

| Name | Location |
|---|---|
| Craigmore Fishery | Randalstown |
| Creeve Trout Fishery | Randalstown |
| Mossley Mill Dam | Newtownabbey |
| Potterswall Reservoir | Antrim |
| Straid Fishery | Ballynure |
| Tildarg Fishery | Ballyclare |
| Toome Canal | Toome |

6.56 The four main rivers within the Council area as illustrated in Figure 6.6 (Six Mile Water, River Maine, Crumlin River and the River Bann) provide additional fishing facilities for coarse, game and trout fishing. Coarse fishing is available seasonally on the Six Mile Water River and available all year round on the River Bann. No Sunday fishing is allowed on the Six Mile Water and a Game rod licence is required.

6.57 The Council area also has a short coastline on Belfast Lough which offers its own opportunities for sea fishing.

**Figure 6.6: Main Rivers & Fisheries in Antrim & Newtownabbey**




*Source: Antrim & Newtownabbey Borough Council*

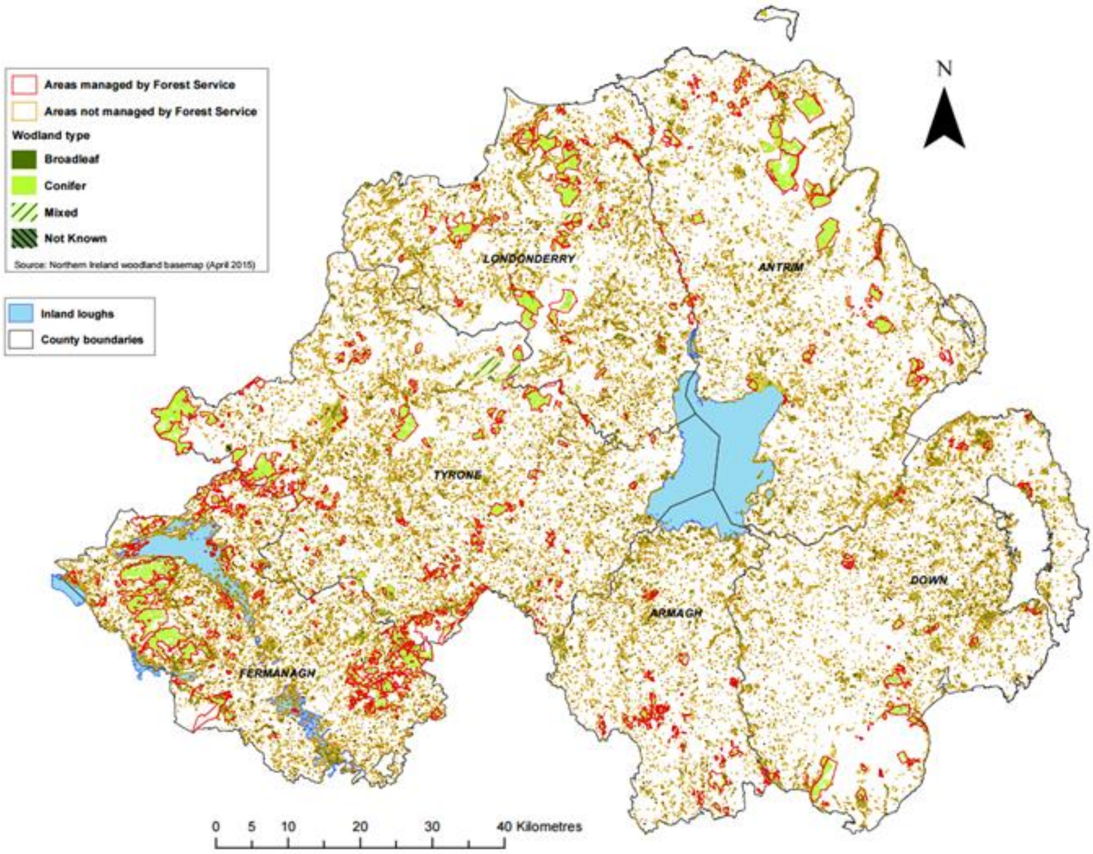
### Forestry

6.58 Forests and woodlands provide important habitats, natural resources and diversity to landscapes. According to the Woodland Trust, Northern Ireland ranks badly as one of the least wooded regions in Europe with just 7% woodland cover, compared to the European average of 44%.

6.59 Over 70% of Northern Ireland's woodlands and semi-natural forests are owned and managed by the Forest Service; the remainder is managed mostly by private landowners (Figure 6.7).

6.60 Under the Rural Development Programme (RDP) for 2014 – 2020 £17.4 million has been allocated to support private woodland expansion and the sustainable management of existing woodlands. As part of the Rural Development Programme the need to develop new forests and woodlands providing for public access close to urban settlements has been highly favoured. In addition, the programme has identified that future afforestation should be led largely by the private sector and farmers, as they are the largest agricultural land-owning group.

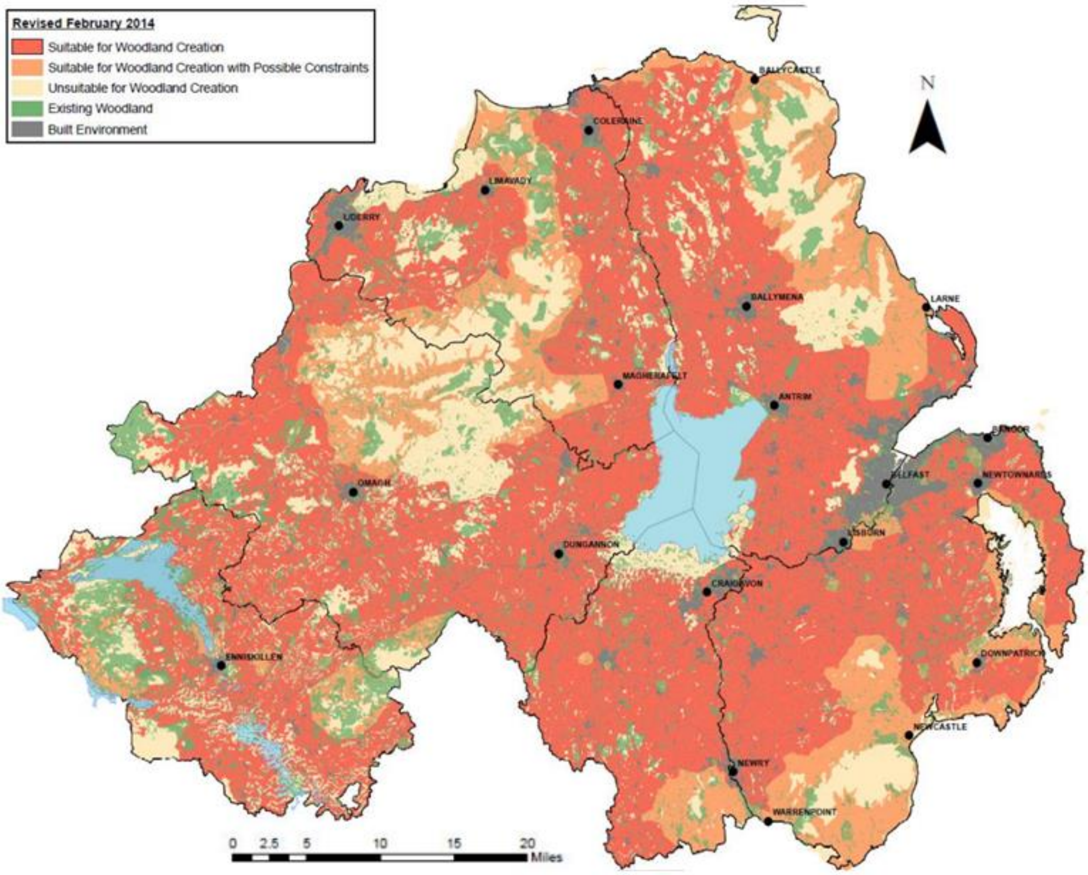
**Figure 6.7: Woodland Management & Type**




***Source:*** *Department of Agriculture, Environment and Rural Affairs (DAERA) & Forest Service*

6.61 Figure 6.8 below shows the land suitable for woodland creation within Northern Ireland. Looking upon our Borough we have significant amount of land suited for woodland creation.

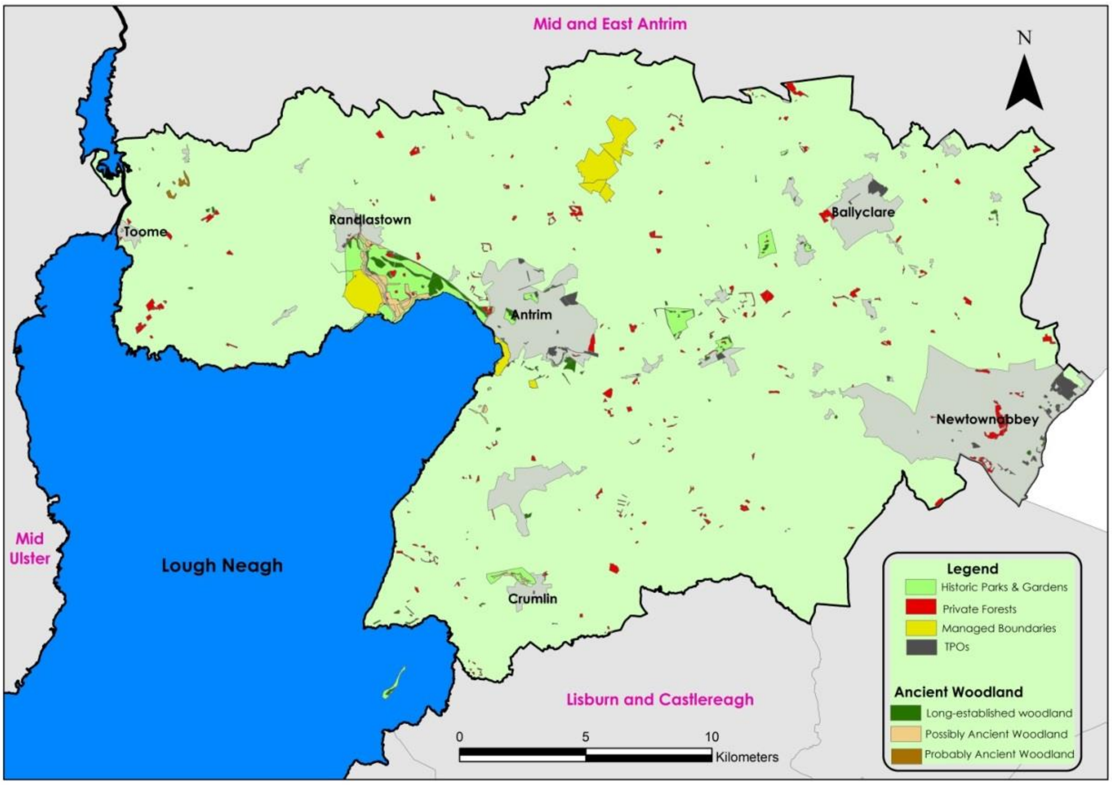
**Figure 6.8: Woodland Creation Suitability 2014**




***Source:*** *Department of Agriculture, Environment and Rural Affairs (DAERA) & Forest Service*

6.62 The Forest Service (DARD), Woodland Trust, and a number of private bodies manage forestry operations within the Borough as seen in Figure 6.9. Forests and woodland in the Borough include Tardree Forest, Rea's Wood, Randalstown Forest, and Crumlin Glen. Much of the Borough's woodland lacks active management, are fragmented and not easily accessible by the public due to distance from residential areas.

### Figure 6.9: Woodland Breakdown in Antrim & Newtownabbey




*Source: Antrim and Newtownabbey Borough Council*

6.63 As of April 2015, Table 6.7 shows there was 2,537.80 hectares of woodland within the Borough, as registered by DARD Forest Service. Of this, 593.30 hectares was directly managed by Forest Service.

### Table 6.7: Woodland in Antrim & Newtownabbey by Type

| | | Awaiting Replant / Awaiting | | | Broadleaf | Conifer | Mixed | Open Ground | Not Known | Short Rotation | Total (Ha) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Broadleaf | Conifer | Mixed | | | | | | | |
| Antrim and Newtownabbey | Forest Service | 1.1 | 17.9 | 0.1 | 102.9 | 431.7 | 13.5 | 26.1 | | | 593.3 |
| | Not Forest Service | | | | 1099.1 | 332.5 | 297.1 | | 215.9 | | 1944.5 |
| ***Total (Ha)*** | | ***1.1*** | ***17.9*** | ***0.1*** | ***1202.0*** | ***764.2*** | ***310.6*** | ***26.1*** | ***215.9*** | | ***2537.8*** |

6.64 Looking at Figure 6.9, there are currently 357 pockets of privately owned forests, 10 historic parks and gardens namely Antrim Castle Gardens, Shanes Castle and Castle Upton Estate, **(87 issued TPOs protecting trees, groups of trees and lands)** all of which add to the overall character and appearance of the Borough.

6.65 Our woodlands are a vital community resource and there is a clear consensus about the need to increase woodland areas in our Borough to counter the impact of climate change, to provide a habitat for wildlife and places for people to relax and unwind from stress and take part in physical exercise.

### Key Findings

6.66 The evidence presented in this section has led to the identification of the following key findings:

- Our Borough contains a relatively low number of farms compared to other Council districts.
- Farm areas are located primarily on low less favoured lands which are disadvantaged and severely dis-advantaged in terms of farming activity.
- There has been a reduction in the amount of land cropped from 2013 until 2015.
- Eel fishing on Lough Neagh is the predominant commercial fishing type that is supported in our Borough.
- Recreational fishing activities occur along the Borough's four main rivers, Lough Neagh and Toome Canal.
- At present there are two fish farms within our Borough supporting the aquaculture of trout species.
- Need to encourage forest growth within our Borough to provide timber, biodiversity and access opportunities for the public as well as furthering Northern Ireland's forest coverage.
- Need to improve public access to forests and to utilise these areas as places of recreation.
- Improve the sustainable management of the forestry resource in our Borough.
- Provide those owning land with the information and the means to consider afforestation as a realistic alternative land use.

### Next Steps

6.67 Further research will be required to ensure a detailed knowledge base regarding the extent of agriculture, fishing and forestry in the Borough. This will primarily involve working with key stakeholders to update evidence already collated, and gather any new research and evidence that may become apparent throughout the preparation of the Local Development Plan.

# 7 Minerals

7.1 This section relates to the topic of minerals, and identifies, collates, and discusses evidence comprising:

- Regional Policy Context
- Existing Development Plans and Operation al Planning Policy;
- Other Relevant Strategies/Legislation;
- Economic Role of Minerals in Northern Ireland;
- Superficial Bedrock Geology;
- Active and Inactive Quarries and Minerals Sites;
- The Minerals Resource Map of Northern Ireland;
- Minerals Licensing;
- Review of Old Minerals Permissions (ROMPS);
- Key Findings; and
- Next Steps.

7.2 The minerals industry makes an essential contribution to the economy and to our quality of life, providing primary minerals for construction, and other trades, and is also a valued provider of employment, particularly in rural areas. Extraction and processing can have a significant impact on the countryside and plans must recognise the need for a sustainable approach.

7.3 Whilst mineral development and related industry are an important part of the economic make up of Northern Ireland, the development and exploitation of mineral resources can have significant environmental impacts. By their nature, scale, location and duration of operation mineral development can impact more severely on the environment than many other forms of development. They can damage or destroy sites of nature conservation or science value and sites of historic and archaeological importance. They can also have a significant visual impact on the landscape and an adverse impact on the amenity of people living nearby.

7.4 The importance of securing a continuous supply of minerals to support the construction industry is accepted while ensuring that an appropriate balance is achieved with regard protecting the environment and the safeguarding residential amenity.

7.5 It is important to remember that as mineral extraction sites are predominantly rural in their location, the transportation of minerals to end users relies heavily on the public road network.

### Regional Policy Context

### Everyone's Involved – Sustainable Development Strategy

7.6 One of the six Priority Areas for Action outlined in the SDS relates to 'striking an appropriate balance between the responsible use and protection of natural resources in support of a better quality of life and a better quality environment'. This promotes sustainable land and marine management, better planning and management of development in ways which are sustainable and which contribute to creating a better environment. The SDS recognises that whilst we must continue to respect the limits of our natural resources and ensure a high level of protection, sustainable development should not prevent us from using or capitalising on these resources.

### The Regional Development Strategy (RDS) 2035 –Building a Better Future

7.7 The RDS does not provide specific policy aims and objectives for minerals, however Regional Guidance (RG) and Spatial Framework Guidance (SFG) does recognise the importance of the rural area, including towns and villages, which offer opportunities in terms of their potential growth in new sectors, are attractive places to invest, live and work, and have a role as a reservoir of natural resources and highly valued landscapes (SFG13).

### Strategic Planning Policy Statement for Northern Ireland (SPPS)

7.8 The policy approach outlined by the SPPS seeks to balance the need for mineral resources against the need to protect and conserve the environment.

7.9 The Regional Strategic Objectives for minerals and minerals development relate to:

- The facilitation of sustainable minerals development;
- Minimising the effects of minerals development on society and the wider environment; and
- Ensuring that minerals sites are restored in a sustainable, safe, and timely manner, which promotes reuse

7.10 In preparing LDPs, the SPPS states that councils should bring forward appropriate policies and proposals that:

- Ensures sufficient local supplies of construction aggregates can be made available for use within the local, and where appropriate, the regional market area and beyond, to meet likely future development needs over the plan period;
- Safeguard mineral resources which are of economic or conservation value, and seek to ensure that workable mineral resources are not sterilised by other surface development which would prejudice future exploitation;

- Identify areas that should be protected from minerals development because of their intrinsic landscape, amenity, scientific or heritage value (including natural, built and archaeological heritage). There should be a general presumption against minerals development in such areas.

7.11 With regard to an evidence base, the SPPS points toward the Minerals Resources Map of Northern Ireland. This is discussed later in this section.

**Existing Development Plans and Operational Planning Policy**

7.12 One of the aims of Antrim Area Plan was to protect the proven reserves of lignite and of any mineral of outstanding importance by limiting surface developments which would prejudice the recovery of those reserves, and seeks to ensure their working with the minimum of environmental disturbance. Part 2, paragraph 14 of the Plan deals with Extraction of Aggregates and Minerals and introduces policy to assess planning applications. The Plan also designated a Lignite Policy Area to the south east of Crumlin.

7.13 With regard to the Belfast Metropolitan Area Plan, it's Plan Strategy and Framework acknowledges that mineral exploration and development provides employment and necessary materials for construction in localised areas where useful deposits occur. It also recognises that extractions and processing of minerals can have a significant impact on the environment.

7.14 Current Operational Planning Policy with regard to minerals development is contained within the Planning Strategy for Rural Northern Ireland (PSRNI), Planning Policy Statement 2: Natural Heritage (PPS 2), Planning Policy Statement 6: Planning, Archaeology and the Built Heritage (PPS 6), Planning Policy Statement 15 (Revised): Planning and Flood Risk (PPS 15), and Planning Policy Statement 21: Sustainable Development in the Countryside (PPS 21). Until a new Plan Strategy is adopted by Council, transitionary measures allow for the retention of the policy provisions contained within the PSRNI, PPS 2, PPS 6, PPS 15, and PPS 21.

7.15 In the absence of a planning policy statement for mineral development, the PSRNI constitutes prevailing planning policy. The concept of sustainability underpins the strategy; however it recognises that in the context of minerals, this can pose particular difficulties. The strategy recommends that the rate of consumption of finite minerals should be reduced by encouraging the use of renewable and recycled alternatives where ever this is practical and economically viable. The minerals industry should aim for the best use of the total aggregate resources by minimising wastage and avoiding the use of higher quality materials where lower grade materials would suffice.

7.16 PSRNI contains the following planning policies with regard to minerals and minerals development:

- Policy MIN 1 – Environmental Protection;

- Policy MIN 2 – Visual Implications;
- Policy MIN 3 – Areas of Constraint;
- Policy MIN 4 – Valuable Minerals;
- Policy MIN 5 – Mineral Reserves;
- Policy MIN 6 – Safety and Amenity;
- Policy MIN 7 – Traffic; and
- Policy MIN 8 – Restoration.

7.17 PPS 2 sets out planning policies for the conservation, protection and enhancement of our natural heritage. Operational planning policies within PPS 2 that are of relevance to this topic include:

- Policy NH 1 – European and RAMSAR Sites;
- Policy NH 2 – Species Protected by Law;
- Policy NH 3 – Sites of Nature Conservation Importance (National);
- Policy NH 4 – Sites of Nature Conservation Importance (Local);
- Policy NH 5 – Habitats, Species or Features of Natural Heritage Importance; and
- Policy NH 6 – Areas of Outstanding Natural Beauty (AONB).

7.18 PPS 6 sets out a range of policies for the protection and conservation of archaeological remains and features of the built heritage. Mineral developments must have regard to the built environment that are of archaeological and historical importance.

7.19 Operational planning policies within PPS 6 that are of relevance to the topic of minerals and mineral developments include:

- Policy BH 1 – The Preservation of Archaeological Remains of Regional Importance and their Settings;
- Policy BH 2 – The Protection of Archaeological Remains of Local Importance and their Settings;
- Policy BH 3 – Archaeological Assessment and Evaluation;
- Policy BH 4 – Archaeological Mitigation;
- Policy BH 5 – The Protection of World Heritage Sites;
- Policy BH 6 – The Protection of Parks, Gardens and Demesnes of Special Historic Interest;
- Policy BH 10 – Demolition of a Listed Building; and
- Policy BH 11 – Development affecting the Setting of a Listed Building.

7.20 PPS 15 sets out operational planning policies to minimise and manage flood risk to people, property and the environment. Relevant operational planning policies in the context of minerals and mineral development include:

- Policy FLD 1 – Development in Fluvial (River) and Coastal Flood Plains;
- Policy FLD 2 – Protection of Flood Defence and Drainage Infrastructure; and
- Policy FLD 3 – Development and Surface Water (Pluvial) Flood Risk

7.21 The primary aim of PPS 21 is to manage development in the countryside in a manner which strikes a balance between the need to protect the countryside from unnecessary or inappropriate development, whilst supporting rural communities. It sets out planning policies and main planning considerations in assessing proposals for development in the countryside. Policy CTY 1 – Development in the Countryside, is of particular relevance to the topic of minerals and mineral development.

7.22 A strategic level review of operational planning policy is examined further in the Policy Review Evidence Paper.

**Other Relevant Strategies/Legislation**
**Review of Old Mineral Permissions (ROMPS)**

7.23 The Environmental Impact Assessment (EIA) Directive has been in force throughout the EU since 1985. It was implemented in Northern Ireland by the Planning (Assessment of Environmental Effects) Regulations (Northern Ireland) 1989 and later by the Planning (Environmental Impact Assessment) Regulations (Northern Ireland) 1999, and a subsequent 2015 version

7.24 These pieces of legislation mean that when assessing applications for mineral development, there is a more stringent level of consideration given to the environmental impacts of that development than was previously the case.

7.25 Because of the introduction of the 1989 regulations along with the formation of a specialised minerals planning unit within Planning Service, it is generally accepted that planning permissions granted for quarrying development since the early 1990's have adequate environmental conditions attached. Permissions granted during the 1970's and 1980's, following the implementation of the Planning (General Development) Order (Northern Ireland) 1973 may not have adequate conditions attached and subsequently need to be reviewed.

7.26 The Planning Act (Northern Ireland) 2011 makes provision for these reviews of old permissions to be undertaken ensuring that their conditions meet modern expectations and current environmental standards.

7.27 The legislation makes provision for mineral sites to be classed as phase 1 sites if they had been granted approval before 31st December 1980 and phase 2 sites if they have been granted approval after 31st December 1980 but before

31st December 1993. The pieces of legislation both state that all owners of phase 1 and phase 2 sites must apply to the planning authority to have the conditions to which their permission relates reviewed.

7.28 However, the Act requires further legislation in the form of an Order, before ROMPS can be undertaken. The Environment Minister has stated that whilst this legislation is not currently being implemented, no decision has been taken NOT to implement the legislation at some point in the future and has instructed Departmental officials to examine how best to implement ROMPS in the new two tier planning system.

**The Mining Waste Directive (2006/21/EC)**

7.29 The Mining Waste Directive (2006/21/EC) was adopted by the European Union in March 2006 with the goal of regulating waste from extractive industries in order to prevent or reduce as far as possible, any adverse effects on the environment. In order to comply with this directive, the Planning (Management of Waste from Extractive Industries) Regulations (Northern Ireland) 2010 were introduced. These regulations were intended to ensure that all waste resulting from extractive industries was managed in a way which was compliant with the 2006 directive.

7.30 The 2010 regulations were replaced by the Planning (Management of Waste from Extractive Industries) Regulations (Northern Ireland) 2015 from 1st April 2015. Regulation 4 of this legislation states that planning permission will not be granted unless a waste management plan (WMP) has been submitted and approved by the Council.

**Economic Role of Minerals in Northern Ireland**

7.31 As stated in the SPPS, minerals play a vital economic role in Northern Ireland. The Geological Survey of Northern Ireland (GSNI) estimates that the total turnover from the Quarry and Quarry Products Sector in Northern Ireland is around £630million, which equates to about 3% of the GDP.

7.32 The Quarterly Employment Survey (QES) produced by NISRA in March 2016 estimates the amount of people employed directly in mining and quarrying is around 1,890 persons.

7.33 Minerals provide raw materials for the construction, manufacturing, energy creation and agricultural sectors. Each of these sectors generate employment and stimulates other parts of our economy. In Northern Ireland the extraction of minerals and their exploration makes a very significant contribution to property and quality of life given the large proportion of income derived from this industry and particularly in rural areas.

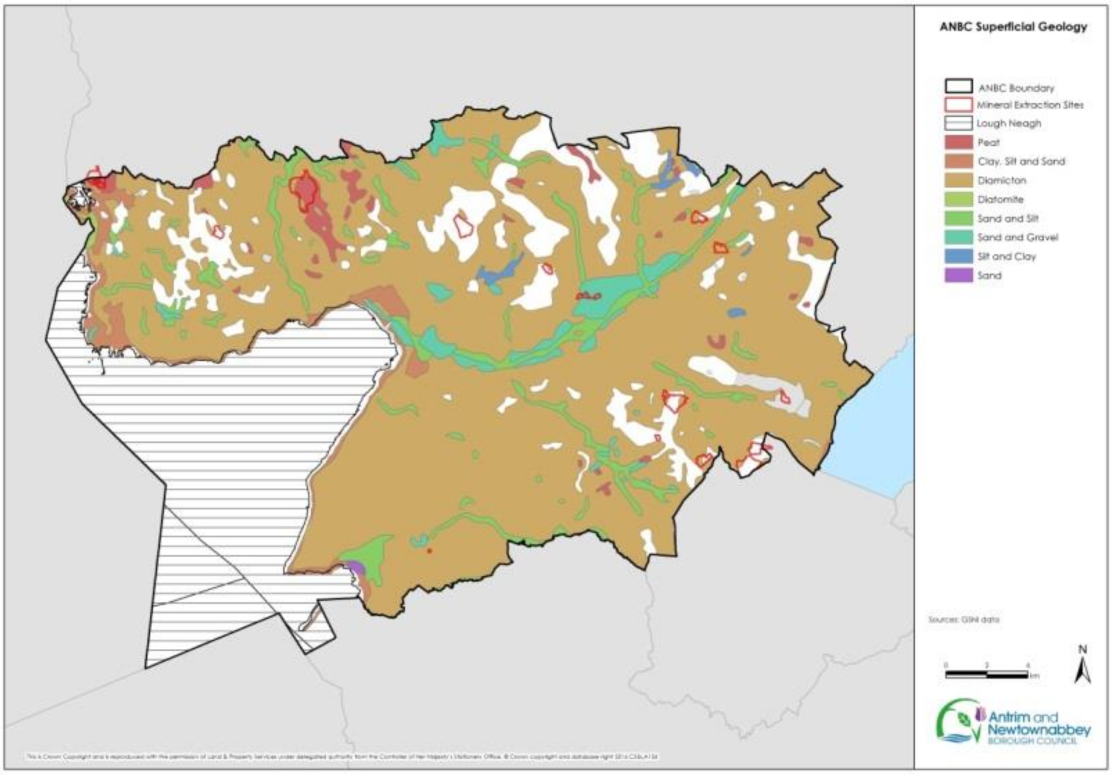
7.34 The construction industry in Northern Ireland accounts for 10% of Northern Ireland's GDP and is completely reliant on quarrying and the development of minerals. Without mineral development, the construction industry would not have the fundamental materials it needs.

7.35 It is clear that the development of mineral resources has indisputable benefits for Northern Ireland's economy. Whilst minerals are therefore essential to support Northern Ireland's economic growth their development and operation must be balanced against the significant effects they can have on the environment and on amenity.

**Superficial & Bedrock Geology**

7.36 The superficial geology[4] (youngest of the geological formations) underlying the Borough is wide ranging as illustrated in Figure 7.1. With regards to our Borough the main superficial geology is Diamicton, which is terrigenous sediment that has been derived from the erosion of rocks on land.

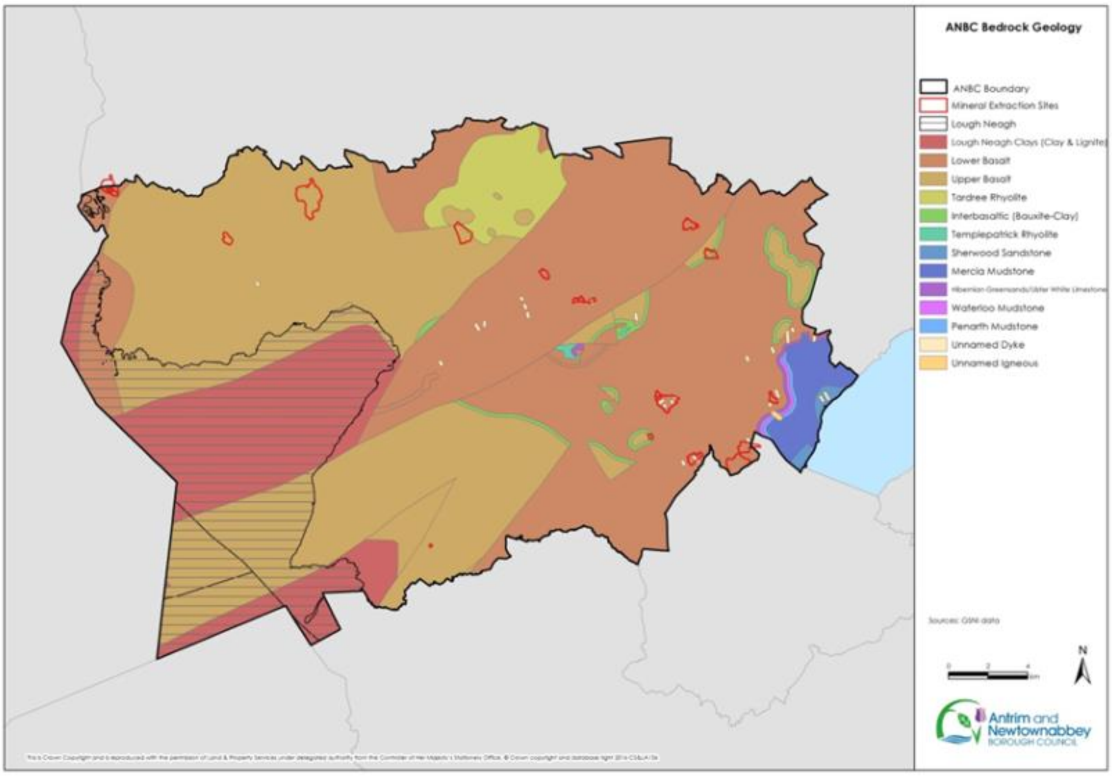
**Figure 7.1: Superficial Geology in Antrim & Newtownabbey**




7.37 Figure 7.2 illustrates the bedrock geology for the Borough. As the Borough lies within the Antrim Lava Group, the igneous rock basalt is the primary bedrock sediment.

[4] Generally regarded as the youngest of the geological formations – less than 2.6million years old.

**Figure 7.2: Bedrock Geology in Antrim & Newtownabbey**




### Active and Inactive Quarries and Mineral Sites

7.38 Three quarries and mineral extraction sites have been identified in the Borough, which are currently classified as ‘active’. However, subsequent, more detailed research may result in the identification of additional active sites. The currently identified active sites are details in Table 7.1.

**Table 7.1: Active Quarries & Mineral Sites in Antrim & Newtownabbey**

| ACTIVE QUARRIES | | |
|---|---|---|
| **ADDRESS** | **COMMODITY** | **OPERATOR/OWNER** |
| Mallusk Quarry<br>104 Mallusk Rd,<br>Newtownabbey | Basalt - Aggregate | James Boyd & Sons<br>(Carmoney) Ltd. |
| Hightown Quarry<br>40 Boghill Rd,<br>Newtownabbey | Basalt- Aggregate | Tarmac Northern Ltd |
| **ACTIVE MINERAL SITES** | | |
| **ADDRESS** | **COMMODITY** | **OPERATOR/OWNER** |
| Ballyginniff Wharf Loughview Rd, Antrim | Sand & Gravel | Northstone (NI) Ltd. |

*Source: Quarry Products Association Northern Ireland (QPANI)*

7.39 The Health and Safety Executive for Northern Ireland (HSENI) has provided information relating to the quarries and minerals sites that are located in the

Borough, but are no longer in operation. The details of these sites are presented in Table 7.2.

**Table 7.2: Inactive Quarries and Minerals Sites in Antrim & Newtownabbey**

| ADDRESS | PERIOD OF INACTIVITY | WATER FILLED | PUBLIC ACCESSIBILITY | FENCED |
|---|---|---|---|---|
| Ballyduff Quarry | Inactive<br>Inert waste landfill | No | <250M | Yes |
| Craighill Quarry<br>Ballyeaston Rd | Inactive<br>Period Unknown | Yes | <250M | Yes |
| Craigmore Quarry<br>Craigmore Road, Randalstown | 30 Years + | No | <250M from Clonkeen Road. >500M to any quarry face | No |
| Hightown Quarry | | No | <250M from Flush Road | Yes |
| Ladyhill Quarry<br>Ladyhill Road, Antrim | Inactive.<br>Has received planning permission for change of use from a quarry to a landfill site. | No | < 250M from Ladyhill Road. | Barrier/ Fenced along roadside |
| Lignite Quarry<br>Aghnadarragh Road, Crumlin | Inactive<br>Period Unknown | Yes | <250m from Aghnadarragh Road | Yes |
| Parkgate Quarry<br>Connor Road, Parkgate | 25 Years + | 2 discrete areas of standing water. | <500M from Connor Road | Partially Fenced along Connor Road. Entrance Protected by locked gates. |
| Tildarg Quarry<br>Tildarg Road, Tardree | Inactive<br>Period Unknown | No | >500M | No |

*Source: Health & Safety Executive for Northern Ireland (HSENI)*

### Minerals Resource Map of Northern Ireland

7.40 In May 2012, the Minerals Resource Map of Northern Ireland was launched by the Environment Minister and the Minister of Enterprise, Trade and Investment. The map provides a tool to assist future decisions on a county-to-county basis, in relation to the supply of minerals and in the protection of the environment. The map, which was developed by the British Geological Survey, Minerals UK, and the Centre for Sustainable Mineral Development, can be viewed here[5].

7.41 It should be noted however that the data depicted on the map relates only to inferred extent and location of a particular mineral resource. Inferred resources are those defined from geological information and assumed but not verified geological continuity. Thus the inferred boundaries are approximate and only

[5] The Minerals Resource Maps for Northern Ireland: http://nora.nerc.ac.uk/18984/1/Antrim_Belfast_Mineral_Map_Final.pdf

indicate the areas within which potentially working workable minerals may occur

7.42 The DOE states that the map will provide a key resource to inform robust development plans and provide increased certainty for the minerals industry with regards to the location, extent and nature of the minerals resource in Northern Ireland. This will aid accurate and faster processing of planning applications.

7.43 The principal source of information regarding the location, extent and nature of the Borough's mineral resource is provided by the Mineral Resources Map for Northern Ireland.

7.44 The map reveals a number of minerals present within our Borough, including:

- Superficial Sand and & Gravel;
- Crushed Rock Aggregates;
- Clay;
- Lignite and Coal;
- Metalliferous Minerals;
- Perlite;
- Hydrocarbons (Unconventional Oil & Gas);
- Salt; and
- Gold

7.45 These minerals are discussed in further detail in the paragraphs that follow.

**Superficial Sand and Gravel**

7.46 Co. Antrim is the third largest sand and gravel producer in Northern Ireland, accounting for 10% of production, principally from the dredging of Lough Neagh.

7.47 Lough Neagh is one of the main sources of good quality sand and gravel in Northern Ireland. It is estimated that 220,000 tonnes of sand and gravel is currently landed in Co. Antrim from Lough Neagh however reserves have not been estimated.

7.48 A large tract of Glaciofluvial sand and gravel deposits caused by meltwater flowing from ice margins is present along the Six Mile Water, extending east of Antrim.

7.49 Raised beach deposits of late-glacial to post-glacial age extend around the coastline of Co. Antrim although these deposits are limited in extent and thickness the most laterally extensive area is west of Antrim town.

**Crushed Rock Aggregates**

7.50 Co. Antrim has an abundant resource of igneous and meta-igneous rocks mainly used for aggregates. It is the largest producer of basalt and other igneous rock in Northern Ireland representing 47% of the total production.

7.51 Crushed rock aggregates (igneous, sedimentary and metamorphic rocks) are a key component of construction materials i.e. concrete and asphalt.

7.52 The upper and lower basalt formations within our Borough are no more than 10meters thick and have very little economic significance.

7.53 A superficial cover of high quality basalt less than 3metres thick currently underlies Ballynure Fair Hill, Lyle Hill and Parkgate. High quality basalt is used for road and concrete aggregate.

**Clay**

7.54 Lough Neagh clay extends over 500km2 of which 300km2 underlie the Lough. Currently there are two prominent areas of Lough Neagh clay in Co. Antrim. In the south they extend around the south—eastern shore of Lough Neagh and the clays are interbedded with flat lying or shallow dipping sands, silts and lignite measuring up to 400m in thickness.

7.55 Over 200million tonnes of iron-rich clay and ironstone have been identified in the Crumlin area at depths down to 60meters. Clays with high iron content have limited usage and currently no resources have been identified for their use. In addition, future extraction may be limited due to their thickness and variability.

**Lignite and Coal**

7.56 Lignite and Coal are fossil fuels derived from dead plant material which has been transformed by burial and compression at elevated temperatures over a long period of time into combustible sedimentary rocks.

7.57 At present there is an extensive area of lignite located to the south-west of Crumlin on the eastern shores of Lough Neagh along with a second site situated in Ballymoney. The lignite occurs in two seams in a fault-bounded basin, dipping below the lough. It is estimated that the resource is about 250million tonnes with a 20year supply period.

7.58 No sources of coal lie within our Borough.

**Perlite**

7.59 Perlite, the industrial name for volcanic glass, forms part of the Tardee Rhyolite Complex. When fused Perlite froths up and forms an inert, lightweight and porous granular product. This product can be used in a wide range of construction uses, i.e. insulation, packaging and agriculture industries.

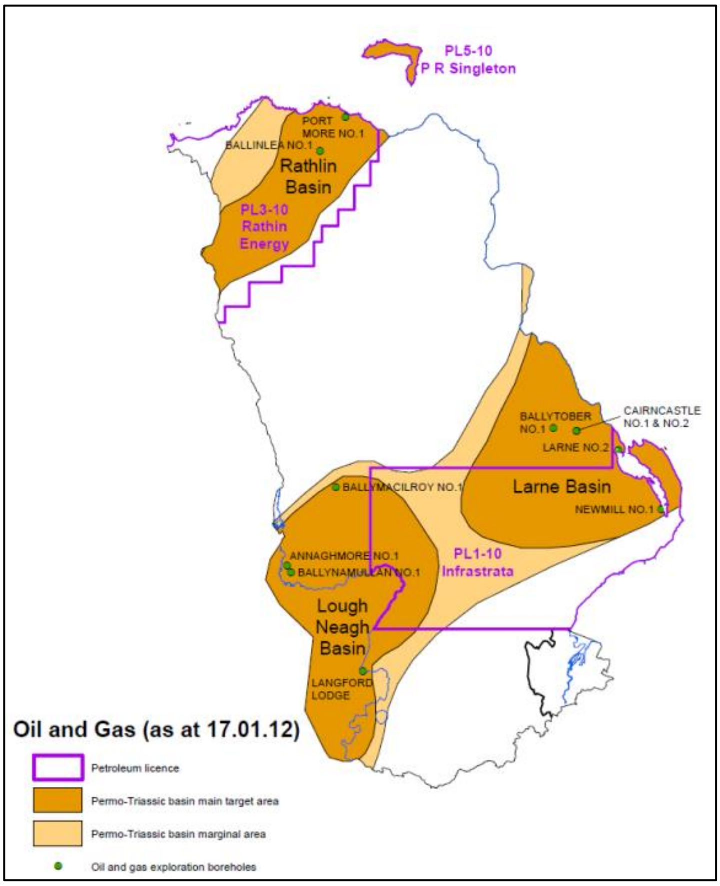
**Hydrocarbons (Unconventional Oil and Gas)**

7.60 The younger Permian and Triassic age rocks beneath Lough Neagh have prospective for oil and gas as illustrated in Figure 7.3.

7.61 Lough Neagh basin is the deepest most prospective of the Permo-Triassic basins. The exploration borehole labelled 'Annaghmore No.1' identified black bituminous oil in the Permian-age Magnesian Limestone (Dolomite). In addition minor gas pockets were discovered at various intervals in the underlying Permian-age sandstones.

7.62 Shale gas is extracted directly from mudrocks and shales. The Carboniferous-age organic rich shales underlying the Lough Neagh may have potential for unconventional shale gas production. However the distribution of shales at depths suitable for shale gas production is unknown because few exploration wells have been drilled into the basin[6].

**Figure 7.3: Oil and Gas Potential**




[6] Current Regional Planning Policy, contained within the Strategic Planning Policy Statement for Northern Ireland, advises of a presumption against unconventional extraction of hydrocarbons.

*Source: British Geological Survey*

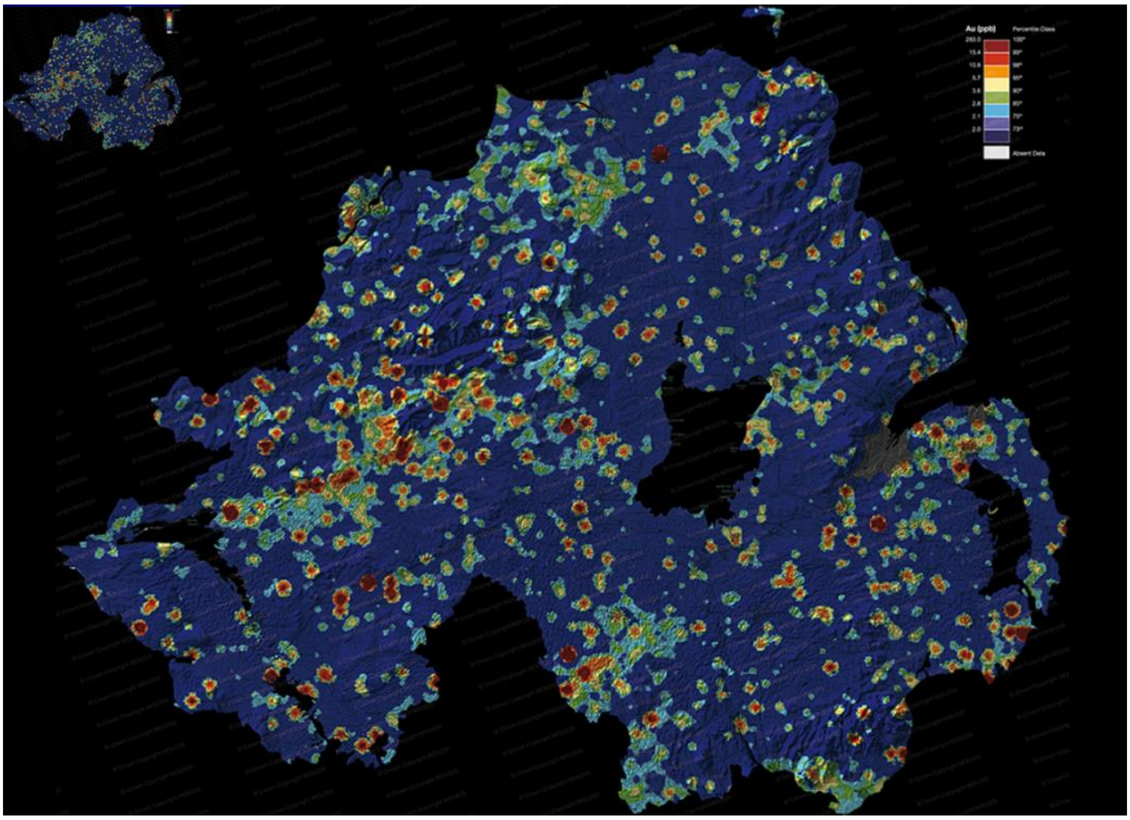
**Salt**

7.63 The resource map shows the subsurface extent of salt-bearing strata based on mapping and borehole evidence. Boreholes north of the Six Mile Water fault extending north-eastwards from Ballynure towards Larne indicate salt present as well as recent evidence suggesting that salt occurs north of the six mile water fault.

**Gold**

7.64 Figure 7.4 (below) indicates the availability of gold in soils across Northern Ireland. The dark red colours indicate the highest potential for gold to exist. At a glance, it is evident within Antrim and Newtownabbey a few 'hotspot' locations for gold resources can be found in Crumlin, Ballynure, Templepatrick and Tardee.

**Figure 7.4: Gold in Northern Ireland Soils**



*Source: British Geological Survey © Crown Copyright 2009. MOU205*

**Annual Mineral Statement 2011, DETI (NI)**

7.65 Each year, around February the Minerals Branch in GSNI on behalf of DETI (NI) collects industry data and publishes an Annual Mineral Statement – a requirement of the Quarries (NI) Order 1983. In the region of 180 quarries are contacted each year from a GSNI database. Quarries report back production values or a nil return indicating that they are no longer in production.

7.66 This annual statement is the primary information source concerning the minerals industry in Northern Ireland. It provides province wide information on the amount of minerals produced, and the number of employees.

7.67 Due to a change in legislation, the last available information on minerals by type and tonnage of material extracted and their cumulative value to the local economy is for 2011. As there is no LGD level statistics, the evidence source is limited to Co. Antrim providing an overview of the Province as a whole.

**Table 7.3: Co. Antrim Mineral Production 2011**

| | QUANTITY PRODUCED (TONNES) | VALUE (£) |
|---|---|---|
| **Basalt & Igneous Rock (other than granite)** | 1,913,688 | 7,307,084 |
| **Sandstone** | 241,865 | 675,964 |
| **Limestone** | 152,887 | 1,681,757 |
| **Sand and Gravel** | 480,793 | 1,060,219 |
| **Other** | 1,003,978 | 10,666,323 |
| **TOTAL** | **3,793,211** | **21,391,347** |

*Source: DETI*

**Minerals Licensing**
**Annual Minerals Licensing Report, DETI (NI)**

7.68 Complying with the Mineral Development Act (NI) 1969, DETI is responsible for producing annual reports which detail mineral and petroleum licenses issued. It briefly details province wide output and selling value figures, along with employment numbers.

7.69 Reviewing the Annual Licensing reports has revealed that for 2009 two 2 licences were issued for Lonmin Plc (producer of platinum group metals) in North Antrim for sites in Crumlin and Lough Beg as seen in Table 7.4.

7.70 Lonmin Plc agreed a scheme of unobtrusive prospecting activities which included collation of existing data, soil and stream sampling analysis, mapping of rocks and geophysical surveys using hand held instruments. No evidence of minerals was found during the license duration.

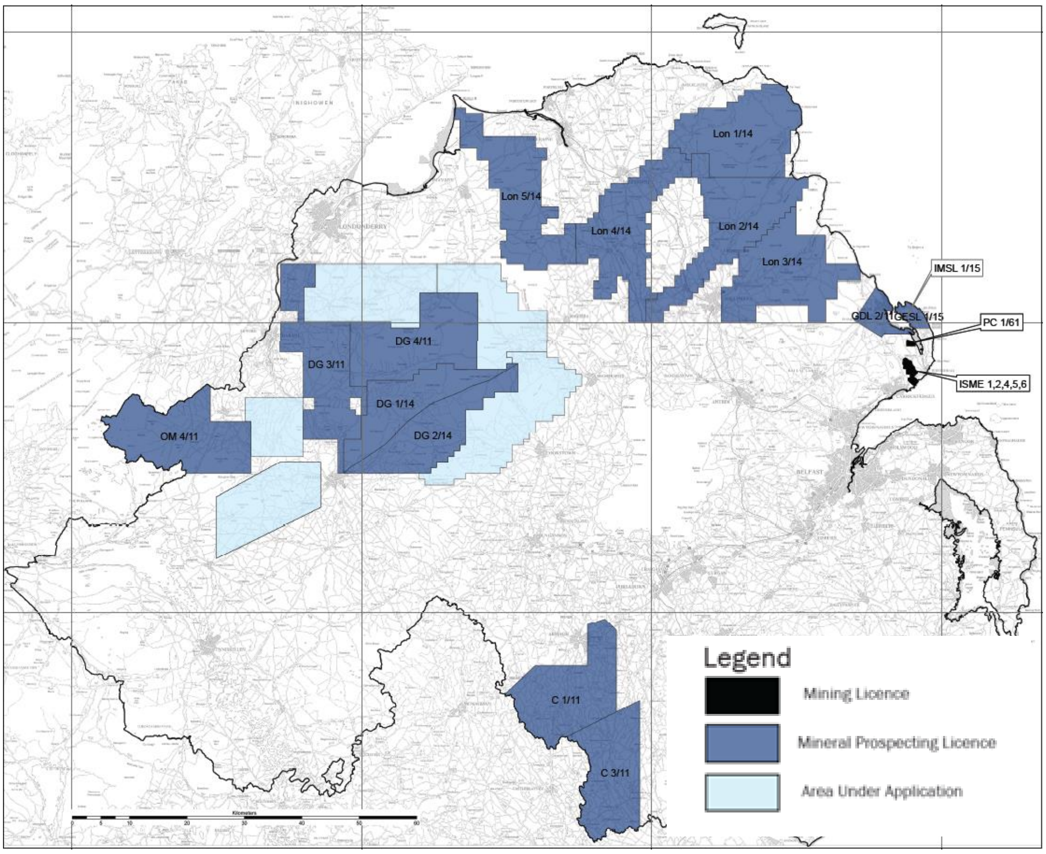
**Table 7.4: Mineral Licenses for Antrim & Newtownabbey (2009)**

| License Holder as of 31st March 2009 | Location | Size (km$^2$) | Minerals | License Reference |
|---|---|---|---|---|
| Lonmin Plc | NE Lough Neagh (Crumlin) | 245 | ALL | LON 6/08 |
| Lonmin Plc | North Lough Neagh (Lough Beg) | 245 | ALL | LON 7/08 |

*Source: DETI*

7.71 At present, there are no mineral prospecting or mining licences within the Borough. These areas, in the context of Northern Ireland, are shown in Figure 7.5.

**Figure 7.5: Mining Licences and Mineral Prospecting Licences (2016)**




*Source: DETINI*

**Review of Old Mineral Permissions (ROMPs)**

7.72 In line with GB and ROI, the DOE introduced legislation through The Planning Reform (NI) Order 2006 to review old minerals permissions. The DOE described the review's objectives as follows:

- To require owners and operators currently holding planning permissions to submit updated conditions;
- To ensure that all quarries in NI have planning conditions that comply with modern environmental standards; and
- To ensure that dormant quarries cannot be returned to use before their planning conditions have been reviewed

7.73 An analysis of this ROMPS data, combined with information relating to planning applications sourced from the Planning Portal, has enabled the identification of ROMP sites throughout the Borough. These are presented in Table 7.5.

**Table 7.5: Identified ROMP Sites in Antrim & Newtownabbey**

| Site ID | Reference | Applicant | Location | Rock Type |
|---|---|---|---|---|
| 6 | U/1974/0150 | Moore Bros Quarries LTD. | Green Rd, Ballyclare | Basalt |
| 16 | U/1974/0393 | Mallusk Quarries LTD. | Craigarogan | Basalt |
| 18 | U/1974/0381 | BOYD | Ballyduff Quarries | Basalt |
| 19 | U/1975/0315 | Public Works (Belfast) LTD. | Boghill Rd, Mallusk | Basalt |
| 20 | U/1974/0151 | Moore Bros Quarries LTD | Craighill Quarry, Ballyclare | Basalt |
| 21 | U/1974/0218 | Mc Quillan LTD | Hightown Rd, Belfast | Basalt |
| 22 | T/1987/0515 | Kane | Flush Rd, Antrim | Basalt |
| 143 | T/1979/0569 | Bulrush Peat Co. LTD | Ballylurgan, Randalstown | Peat |
| 214 | T/1977/0348 | Mc Combe | Crosshill, Crumlin | Basalt |
| 215 | T/1974/0282 | Boville & Mc Mullan LTD | Ladyhill, Antrim | - |
| 235 | U/1974/0382 | Boyd & Sons (Carmoney) LTD. | Colinward, Newtownabbey | Grit |
| 260 | T/1974/0061 | Owens & Sons LTD | Ballywee, Templepatrick | Basalt |
| 330 | T/1991/0612 | Antrim Sand & Gravel | Grange Rd, Parkgate | Sand/Gravel |
| 433 | G/1992/0184 | Mc Anulty | Loughbeg Rd, Toomebridge | Peat |

**Geo-Thermal Energy Potential**

7.74 Geo-thermal energy is derived from naturally occurring heat from rocks at depth. Naturally heated groundwater can provide a renewable source of heat and electricity.

7.75 Permo-Triassic age sedimentary rocks (Basalts) have the potential for geothermal energy. Currently there are 3 Permo-Triassic basins that underlie Co. Antrim, one of which is located within our district - the Lough Neagh Basin.

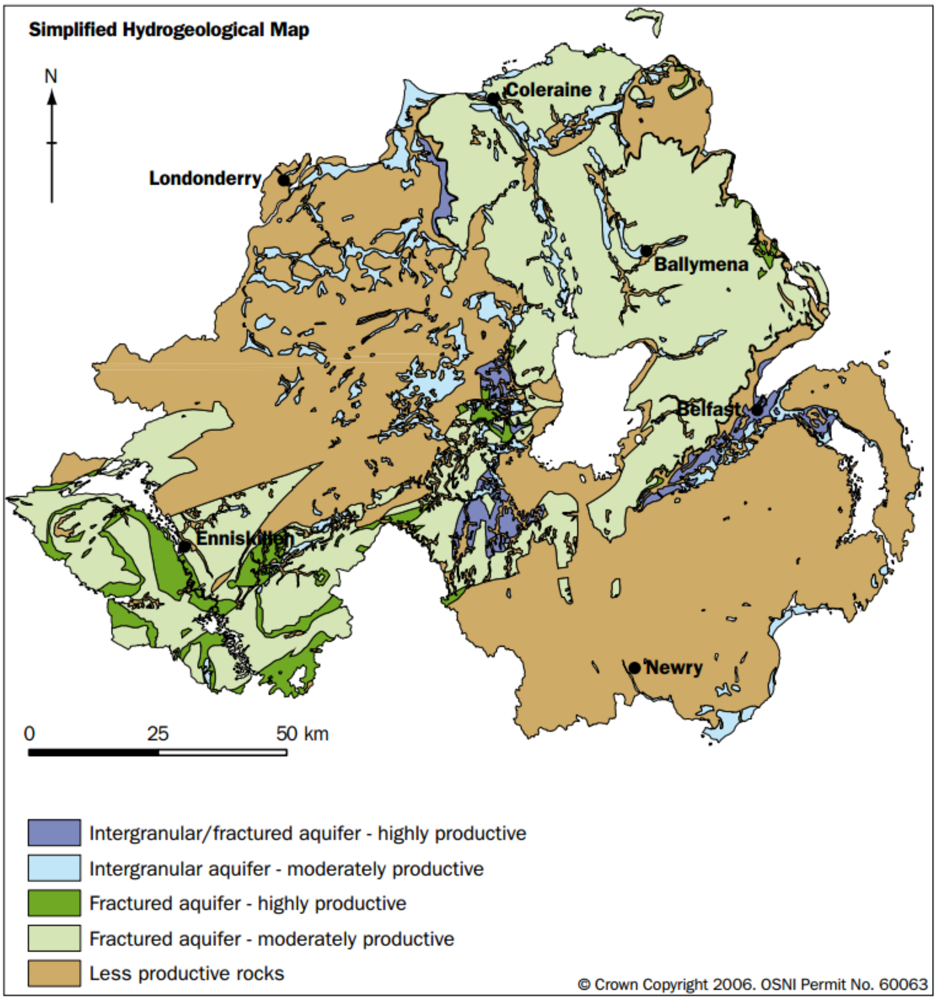
7.76 The Lough Neagh basin at depth has the potential to act as a ‘geothermal aquifer’ with naturally heated groundwater accumulating in the pore spaces of the sedimentary rocks.

7.77 Our Borough is defined in Figure 7.6 as having a moderately productive fractured aquifer. Such aquifers comprise mainly of raised marine deposits which contain a high proportion of silt and clay and are characterised by low permeability. They are also generally thin, which reduces their potential for yielding large volumes of groundwater even further.

7.78 The glacial sands, clays and gravels of the Six Mile Water stretch and the Sherwood Sandstones of urban Newtownabbey indicate an intergranular aquifer flow with moderate productivity.

7.79 There is limited aquifer potential in the Lough Neagh clays however small water supplies can be obtained in the lignite although water quality may be poor with iron present in solution.

**Figure 7.6: Simplified Hydrogeological Map**




*Source: DETNI*

## Key Findings

7.80 The evidence presented in this section has led to the identification of the following key findings:

- Antrim and Newtownabbey's position on top of the 'Antrim Lava Group' gives it stocks of igneous rocks useful for building and road stone.
- The Borough has an excellent resource of aggregate material i.e. sand, gravel & basalt.
- There is an extensive area of Lough Neagh Clay within our district however there are no current resources identified for the usage of the clay.

- There is a significant mineral resource of lignite located in Crumlin, representing 250million tonnes with the ability to supply electricity for a 20year period.
- There is a potential shale gas resource at Lough Neagh; however the depths suitable for such are unknown due to the limited number of borehole investigations. Furthermore, Regional Planning Policy advises of a presumption against the unconventional extraction of hydrocarbons.
- The Lough Neagh basin holds prospective for intermediate and deep geothermal energy.
- Although it is not possible to quantify the amount of minerals required over the Plan period up to 2030, there will be a need to ensure that supplies of raw materials are provided in pace with any economic growth that occurs.
- The LDP will need to accommodate any potential expansion of existing quarries as well as the opening of new workings. It is therefore important that the Plan achieves a balance between economic development and safeguarding the most valuable and vulnerable areas of the environment from the detrimental effects of mineral extraction.
- There is also a need to ensure that there is a degree of protection afforded to Antrim natural environment given its contribution to the development of tourism and recreation.
- In line with the policy approach in the SPPS, the Plan's overall approach to mineral development should be to balance the demands of the mining and extractive industry with the need to protect and conserve the environment.

**Next Steps**

7.81 Further research will be required with regard to the extent of minerals and mineral developments in the Borough, and the value of this sector to the local economy, and the potential impacts of such developments upon the environment and wider society. In order to do so, the Planning Section will liaise with key stakeholders, including Departments within the Northern Ireland Executive, representatives from the minerals sector, and other interested parties.

# 8 Waste Management

8.1 This section relates to the topic of waste management, and identifies, collates, and discusses evidence comprising:

- Regional Policy Context;
- Existing Development Plans and Operational Planning Policy;
- Other Relevant Strategies/Legislation;
- Waste Management in Antrim and Newtownabbey
- Key Findings; and
- Next Steps.

8.2 Waste is described as the unwanted by-product of industrial, commercial and domestic activities or anything otherwise discarded. Sustainable waste management is essential for the health and well-being of society, and our quality of life. Sustainable waste management can be seen as a resource and an opportunity, rather than a burden. The provision of waste facilities and infrastructure can make a valuable contribution towards sustainable development.

8.3 Waste development can be associated with affecting and sometimes damaging the environment. However, this does not have to be the case. It is important for planning officers to be aware of where waste development is located in relation to a number of factors including, neighbouring land uses, environmental assets, land and water resources, and areas of flood risk. It is imperative that proposed waste development sites are located in the right place, with suitable transport and socio-economic connections.

8.4 Waste regulations in NI are now overseen by Department of Agriculture, Environment and Rural Affairs (DAERA), having previously been by the Department of the Environment (DOE). Responsibilities include registering waste carriers, waste management licensing, enforcement and overseeing remedial action, identifying contaminated land, as well as determining liability of contaminating substances which escape to other land.

8.5 Waste can be divided into two categories – municipal and non-municipal. Municipal refers to waste created by an individual person, household, business, or institutions, such as schools or hospitals. Non-municipal waste is waste that is created due to the production of a product. This can be divided into three main categories – mining, agricultural, and industrial wastes.

**Strategic Policy Context**

**Everyone's Involved – Sustainable Development Strategy**

8.6 One of the six Priority Areas for Action outlined in the SDS relates to 'striking an appropriate balance between the responsible use and protection of natural resources in support of a better quality of life and a better quality environment'. This promotes sustainable land and marine management, better planning and management of development in ways which are sustainable and which contribute to creating a better environment. The SDS recognises that whilst we must continue to respect the limits of our natural resources and ensure a high level of protection, sustainable development should not prevent us from using or capitalising on these resources.

**Regional Development Strategy (RDS) 2035 – Building a Better Future**

8.7 The RDS recognises the importance of waste management, and acknowledges that should waste not be managed in a safe manner, it can become a serious threat to public health, cause damage to the environment, and result in local nuisance.

8.8 With regard to Regional Guidance (RG) and Spatial Framework Guidance (SFG), the RDS promotes the application of the Waste Hierarchy principles as outlined in the EU Waste Framework Directive 2008 (discussed later in this section). Furthermore, it seeks the adoption of the 'proximity principle', whereby waste should be processed as close as practicable to its point of generation to minimise the environmental impacts of waste transport (RG11).

8.9 The RDS also recognises the need to meet strict targets set by the EU Landfill Directive with regard to the amount of biodegradable waste that can be sent to landfill, and that this will require the development of significant new waste management infrastructure throughout Northern Ireland.

**Strategic Planning Policy Statement for Northern Ireland (SPPS)**

8.10 The SPPS acknowledges the valuable contribution that the provision of waste facilities and associated infrastructure can make towards sustainable development. The policy approach outlined within the SPPS seeks to support wider government policy with regard to sustainable waste management.

8.11 The Regional Strategic Objectives for waste management relate to:

- Promoting the development of waste management and recycling facilities in appropriate locations;
- Ensuring that detrimental effects on people, the environment, and local amenity associated with waste management facilities are avoided or minimised; and
- Securing the restoration of proposed waste management facilities following the closure of such sites.

8.12 The SPPS advises that councils should set out policies in their LDPs that support these objectives, which are tailored to local circumstances. Crucially, councils will be required to outline criteria for the location of waste management facilities. Important considerations include the accessibility of sites to the regional transportation network, the identification of the need for waste management facilities, and the potential impacts of existing and approved waste management facilities on neighbouring areas.

**Existing Development Plans and Operational Planning Policy**

8.13 The Antrim Area Plan does not provide policies regarding sustainable waste management. This is primarily due to the growth of the sustainability agenda in the intervening years since the Plan's publication. The AAP refers to waste disposal in the context of the Rural Area, and that such proposals will be given sympathetic consideration. However, it does acknowledge that facilities are often visually problematic, particularly in the case of vehicle or scrap metal facilities, and that these are likely to be unacceptable in rural areas. According to the Plan, well screened derelict quarries may present the only exception for waste management facilities in the countryside.

8.14 The Belfast Metropolitan Area Plan refers to the relevance of arc21(the sub-regional waste planning body) to the Plan area, and the existence of the arc21 Waste Management Plan which provides a framework for future waste management, and promotes the potential for waste prevention, recycling, recovery and disposal. Importantly, the BMAP advises that proposals for waste management facilities will be considered against prevailing regional planning policies.

8.15 Current Operational Planning Policy with regard to waste management is contained within Planning Policy Statement 11: Planning and Waste Management (PPS 11), Planning Policy Statement 15 (Revised): Planning and Flood Risk (PPS 15, and Planning Policy Statement 21: Sustainable Development in the Countryside (PPS 21). Until a new Plan Strategy is adopted by Council, transitionary measures allow for the retention of the policy provisions contained within PPS 11, PPS 15, and PPS 21.

8.16 PPS 11 sets out policies for the development of waste management facilities. Operational planning policies within PPS 11 include:

- Policy WM 1 – Environmental Impact of a Waste Management Facility;
- Policy WM 2 – Waste Collection and Treatment Facilities;
- Policy WM 3 – Waste Disposal;
- Policy WM 4 – Land Improvement; and
- Policy WM 5 – Development in the vicinity of Waste Treatment Facilities

8.17 The Best Practicable Environmental Option (BPEO) emphasises the protection and conservation of the environment across land, air and water. The BPEO procedure establishes for a given set of objectives, the option that provides the most benefit or the least damage to the environment, as a whole, at acceptable cost, in the long term as well as in the short term.

8.18 PPS 11 included the BPEO as a key principle in pursuing greater sustainability in waste management. On publication of the revised Waste Management Strategy in 2013, the Department of the Environment (DOE) considered that the statutory Strategic Environmental Appraisal (SEA), which is required to be undertaken, duplicates the BPEO process. As such BPEO is no longer a material consideration in the planning process. This is also clarified in the Strategic Planning Policy Statement (SPPS). Planning applications are required to be consistent with Waste Management Plans, but do not need to separately demonstrate the BPEO, the principles of which are more appropriate for consideration outside of the planning process.

8.19 PPS 15 sets out operational planning policies to minimise and manage flood risk to people, property and the environment. Relevant operations planning policies in the context of waste management include:

- Policy FLD 1 – Development in Fluvial (River) and Coastal Flood Plains
- Policy FLD 2 – Protection of Flood Defence and Drainage Infrastructure; and
- Policy FLD 3 – Development and Surface Water (Pluvial) Flood Risk.

8.20 The primary aim of PPS 21 is to manage development in the countryside in a manner which strikes a balance between the need to protect the countryside from unnecessary or inappropriate development, whilst supporting rural communities. It sets out planning policies and main planning considerations in assessing proposals for development in the countryside. Operational planning policies with relevance to the issue of waste management include:

- Policy CTY 1 – Development in the Countryside;
- Policy CTY 4 – The Conversion and Reuse of Existing Buildings; and
- Policy CTY 16 – Development Relying on Non-Mains Sewerage.

8.21 A strategic level review of operational planning policy is examined further in the Policy Review Evidence Paper.

**Other Relevant Strategies/Legislation**
**EU Waste Framework Directive (2008/98/EC)**

8.22 The aim of the Waste Framework Directive is to ensure that the European Union is a recycling society. It encourages Member States to organise separate collection of bio-waste from landfill. In Article 4, it introduces the waste hierarchy as shown in Figure 8.1below.

**Figure 8.1: The Waste Hierarchy**

| Stages | Include |
|---|---|
| Prevention | Avoidance, reduction and re-use; using less hazardous materials (1) |
| Preparing for re-use | Checking, cleaning, refurbishing, repairing whole items or spare parts |
| Recycling | turning waste into a new substance or product. Includes composting if it meets quality protocols |
| Other recovery | anaerobic digestion, incineration with energy recovery, gasification and pyrolysis which produce energy (fuels, heat and power) and materials from waste. Some backfilling operations |
| Disposal | Landfill and incineration without energy recovery (2) |

*Source: Waste Framework Directive (2008/98/EC)*

8.23 The Waste Hierarchy aims to encourage the prevention, reuse, recycling and recovery of waste, and advises that waste disposal should only be used as a last resort, when no other options further up the hierarchy are possible

8.24 According to the Directive, the Waste Hierarchy is legally binding except in exceptional circumstances. Actions should be justified on the basis of life-cycle thinking.

**NI Waste Management Strategy (2013)**

8.25 In response to the EU Waste Framework Directive above, the DOE prepared an NI Waste Management Strategy, the latest version of which is entitled '*Delivering Resource Efficiency*'. This is now the responsibility of DAERA, who explain that the Strategy highlights a number of policy and legislative proposals such as:

- the development of a waste prevention programme;
- the development of a new recycling target for local authority collected municipal waste;
- the introduction of a statutory requirement on waste operators to provide specified data on commercial and industrial waste;
- new and more challenging collection and recycling targets for packaging and waste electrical and electronic equipment;
- the introduction of a landfill restriction on food waste;
- the implementation of legislation on carrier bags; and
- the development of detailed proposals for an Environmental Better Regulation Bill.

### Waste Management Duty of Care

8.26 Under the Waste and Contaminated Land (Northern Ireland) Order 1997, NIEA issued a Duty of Care Code of Practice for those who handle controlled waste[7]. This can ensure waste is dealt with properly and lead to reductions in waste crime, such as fly tipping. The Council is required to this Code of Practice, and the LDP should take account of this commitment.

### Landfill Regulations

8.27 The requirements of the EU Landfill Directive (1999/31/EC) were transposed through the Landfill Regulations (Northern Ireland) 2003, and its amendments, the Waste and Emissions Trading Acts 2003, and the Landfill Allowances Scheme (NI) Regulations 2004 (as amended). The Directive obliges member states to reduce the amount of biodegradable waste in landfill by 65% by 2016 compared to 1995 levels.

### Food Waste Regulations (Northern Ireland) 2015

8.28 These regulations require the separation of food waste from landfill waste. From 2016, businesses producing more than 50kg of food waste per week are required to present their food waste for separate collection. This scheme will be rolled-out in 2017 for businesses producing between 5kg and 50kg of food waste per week. Furthermore, by 2017, councils will be responsible for providing separate receptacles for the collection of food waste from households.

### Arc21 Waste Management Plan

8.29 Antrim and Newtownabbey Borough Council is one of six councils in the east of NI which is part of the arc21 waste management group.

8.30 Arc21 works on behalf of its member councils to guide, support and help them meet their legal requirements (under Article 23 of the Waste and Contaminated Land (NI) Order 1997), and drive forward innovative waste management programmes. Being part of arc21 will ensure the Council operates a co-ordinated approach to waste management with its neighbouring councils.

8.31 Arc21's Waste Management Plan covers the legislative context, and offers options and arrangements for municipal and non-municipal waste (commercial, industrial, packaging, hazardous, and agricultural waste). The Plan then looks to the future requirements of waste management, along with

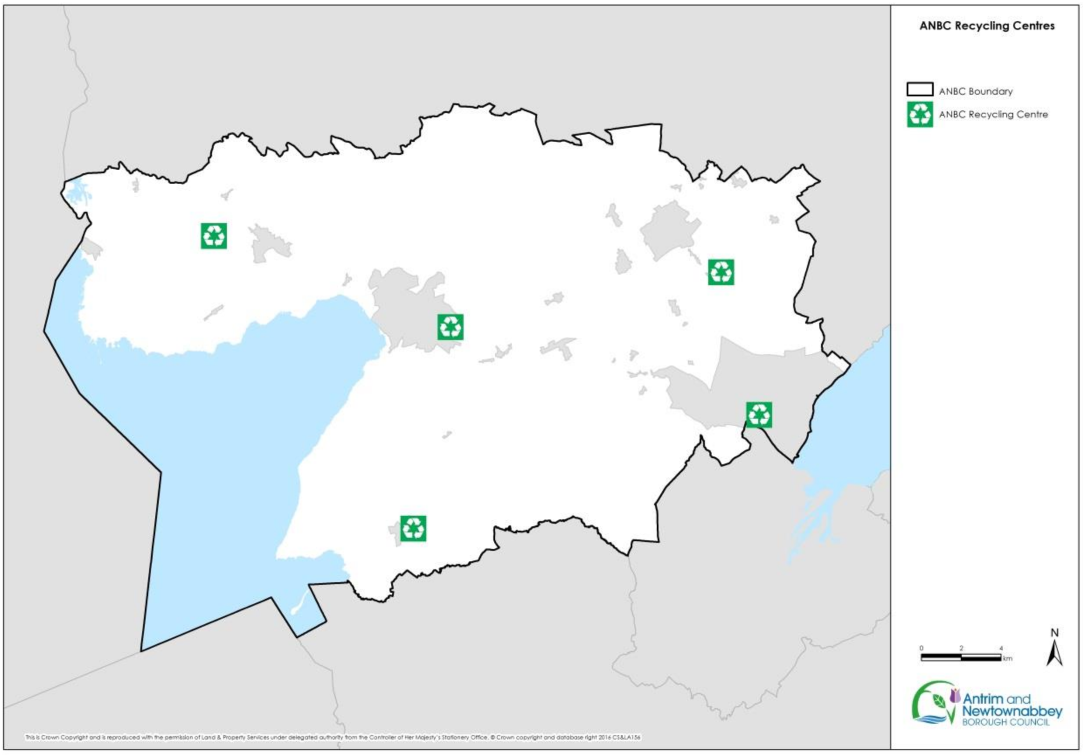
[7] Duty of Care Code of Practice - https://www.daera-ni.gov.uk/sites/default/files/publications/doe/duty-of-care-code-of-practice-june2016.pdf

setting out criteria for site selection. It is anticipated for the Plan to run to 2020, with formal reviews and consultations every six years (or more frequently if deemed necessary). The Council has adopted the arc21 Waste Management Plan and the LDP will have to have regard to this Plan.

**Waste Management in Antrim and Newtownabbey**

8.32 Currently, municipal waste collected by the Council goes to Alpha Resource Management's Mullaghglass Landfill near Lisburn. Whilst the Council does not operate any waste processing plants, it is responsible for operating five recycling centres. These are located at Newpark (Antrim), Bruslee, Crumlin, Craigmore (Randalstown), and O'Neill Road (Newtownabbey), as illustrated in the map at Figure 8.1. These centres are well distributed throughout the Borough and are easily accessible.

**Figure 8.2: Recycling Centres in Antrim & Newtownabbey**




8.33 The maximum annual capacities for these sites are as detailed in Table 8.1.

**Table 8.1 Maximum Annual Capacity of Council Operated Recycling Centres**

| Recycling Centre | Maximum Annual Capacity |
|---|---|
| Bruslee Recycling Centre | 15,000 tonnes |
| Craigmore Household Recycling Centre | 5,000 tonnes |
| Crumlin Household Recycling Centre | 5,000 tonnes |
| Newpark Household Recycling Centre | 10,000 tonnes |
| O'Neill Road Recycling Centre | 20,000 tonnes |

8.34 The waste from these five recycling centres goes to various treatment contractors including Wastebeater, McKinstry Waste Management, Avenue Recycling and Irish Waste Services, depending on the waste stream.

8.35 The Council also provides a bulky household waste collection service for residents who cannot transfer their bulky waste to one of the above recycling centres.

8.36 Avenue Recycling Ltd provides the collection service for garden and food waste from businesses and households in the Borough. Once collected, the organic waste is treated through the arc21 contract with Natural World Products (NWP) Ltd. The main treatment plant in this contract is located outside the Borough, at NWP's In-vessel Composting facility at Glenside, Dunmurry.

8.37 Within the Borough, Bryson Recycling is responsible for collecting dry household and commercial recycling through their kerbside box service and commercial bins. They collect waste from more than 170,000 households in Northern Ireland, and this mixed waste is sorted at their Mallusk Materials Recovery Facility.

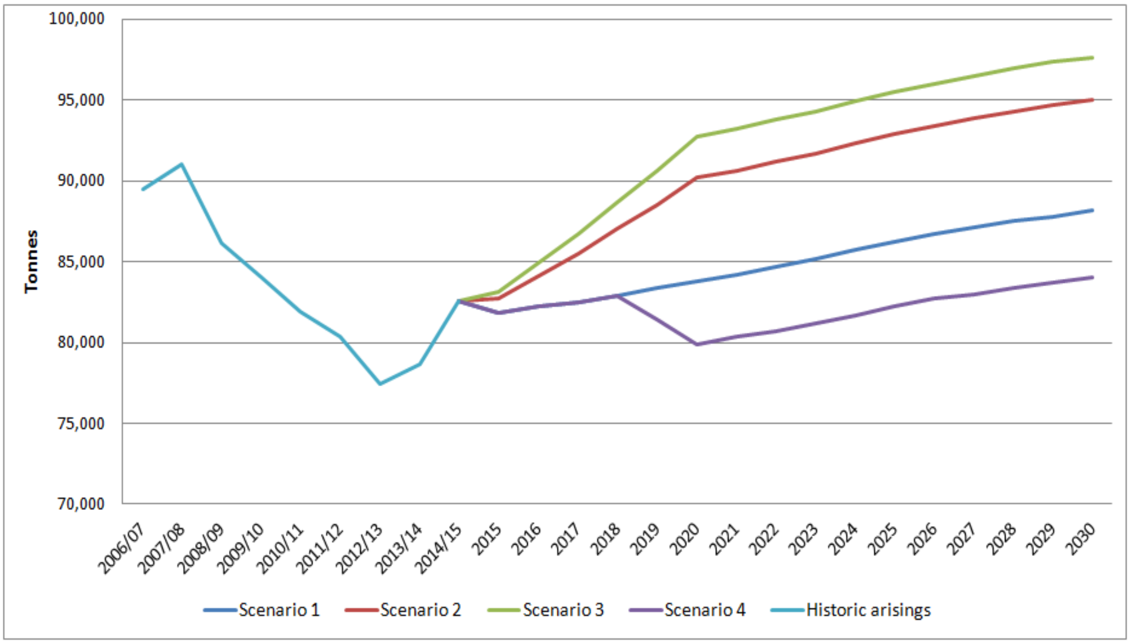
8.38 Throughout the Borough there are also multiple micro-recycling points, where residents can dispose of glass, textiles, paper, etc. These are operated by private companies or charities, usually located in public car parks and require planning permission.

8.39 A recent study looked at waste forecasts for the Borough with the Local Authority Collected Municipal Waste forecasts 2015 to 2030 based on the four scenarios detailed in Table 8.2. These forecasts are also outlined in Figure 8.3.

**Table 8.2: Waste Forecast Scenarios**

| | DESCRIPTION |
|---|---|
| Scenario 1 | Static waste per household for both Antrim and Newtownabbey areas |
| Scenario 2 | 3% per annum increase in the waste per household for Antrim up to 2020, then static<br>Static waste per household for Newtownabbey |
| Scenario 3 | 3% per annum increase in the waste per household for Antrim up to 2020, then static<br>1% per annum increase in the waste per household for Newtownabbey up to 2020, then static |
| Scenario 4 | Static waste per household for both Antrim and Newtownabbey areas up to 2018<br>Waste prevention measures reduce waste per household to 2012/13 levels for both Antrim and Newtownabbey areas by 2020<br>Then static waste per household for both Antrim and Newtownabbey areas up to 2030 |

**Figure 8.3: Waste Forecast Scenarios**

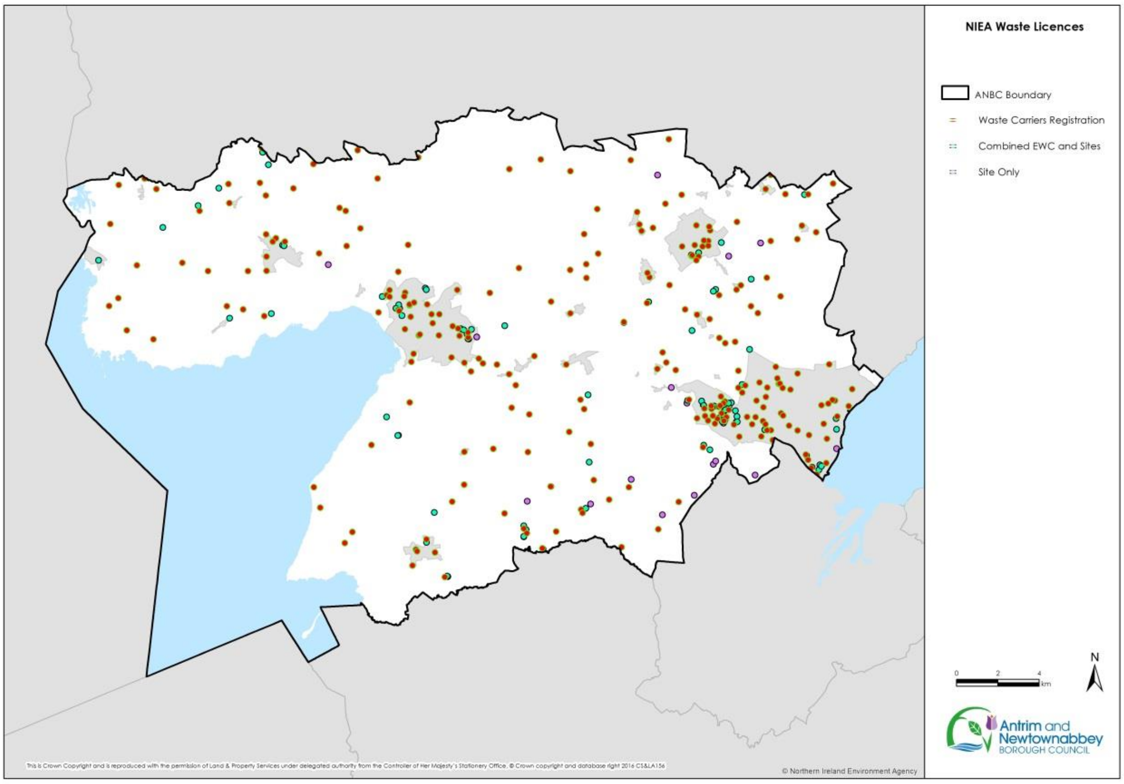



8.40 The Council believes that it has potential access to the necessary waste infrastructure to meet its current legislative targets in 2020, although these facilities are located outside Northern Ireland and the rest of the United Kingdom. Following the UK decision to leave the European Union, there is some uncertainty with regard to the Council having access to the infrastructure within Europe.

**Waste Licensing in Antrim & Newtownabbey**

8.41 Under the Waste and Contaminated Land (NI) Order 1997 and the Waste Management Licensing Regulations (NI) 2003, all activities involving the treatment, keeping or disposal of waste were authorised by Northern Ireland Environment Agency (NIEA) within the Department of the Environment, however, this NIEA responsibility has now transferred to the Department of Agriculture, the Environment and Rural Affairs. This responsibility includes the granting of licences, setting conditions on licensing activities, and monitoring sites to ensure compliance with licence conditions. The majority of these operators process non-municipal waste. The distribution of waste licences throughout the Borough is outlined in Figure 8.4.

**Figure 8.4: Waste Licences in Antrim & Newtownabbey.**



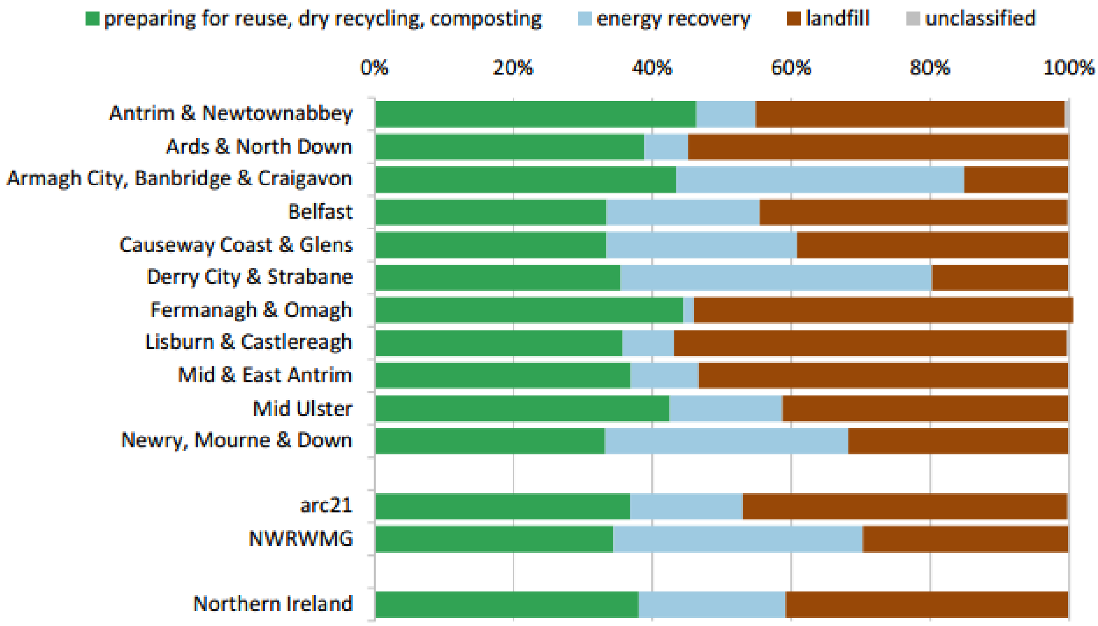

### Waste Management Statistics

8.42 The Northern Ireland Local Authority Collected Municipal Waste Management Statistics Annual Report (2014/15), published by NIEA in November 2015, advises that the landfill rate has significantly decreased from 72.3% of all Local Authority Collected (LAC) municipal waste in 2006/07 to 42.7% in 2014/15. This is due to increased rates of dry recycling, composting and energy recovery. The report explains that the legacy Antrim Borough Council achieved the second highest LAC municipal recycling rate, at 53.2%, - despite Antrim Borough Council's population producing the highest amount of waste per household in NI, with 1.532 tonnes per household, almost one-third more than the NI average (0.995 tonnes) in 2014/15.

8.43 The annual report also advises that, with regard to the legacy councils, of all municipal waste collected by Antrim Borough Council, the proportion that was subsequently recycled or composted was 53.1%. In relation to Newtownabbey Borough Council, this rate was 44.1%. This information indicates that the Council is on target to recycle 50% of all municipal waste by 2020. Updated figures with regard to the new eleven council structure of Local Government will be presented in the forthcoming annual report for 2015/16, which is due for publication in late 2016.

8.44 DAERA also publishes quarterly reports which contain provisional figures on key measures. At the time of writing, the most recent report relates to the period from January to March 2016. The report includes an interesting chart which shows the overall municipal waste by council, as outlined in Figure 8.5.

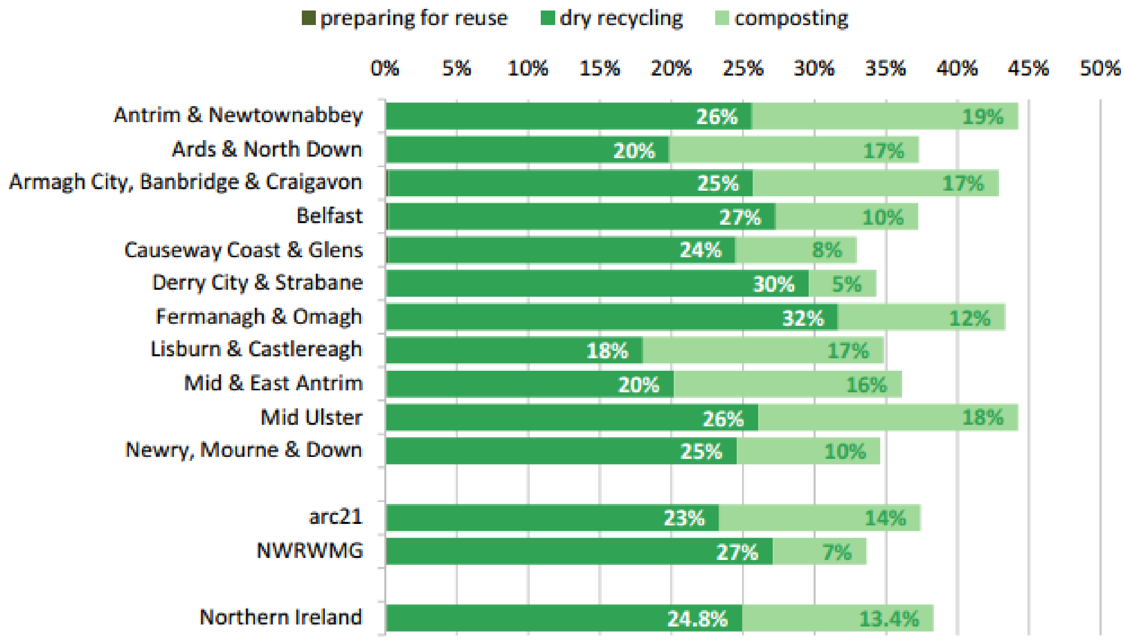
**Figure 8.5: LAC Municipal Waste by LGD & Waste Management Group**




*Source: Northern Ireland Local Authority Collected Municipal Waste Management Statistics – Quarterly Provisional Estimates for January to March 2015, Northern Ireland Environment Agency – Department of Agriculture, Environment and Rural Affairs, July 2016.*
*(https://www.daera-ni.gov.uk/sites/default/files/publications/daera/lac-municipal-waste-q4-2015-16.pdf )*

8.45 This indicates that during this quarter, Antrim and Newtownabbey and Mid Ulster councils had the highest rate of recycled household waste in NI, both at 44.2%. The recycling element outlined in Figure 8.5, is analysed further in the Figure 8.6.

**Figure 8.6: Recycled Household Waste by LGD & Waste Management Group**




*Source: Northern Ireland Local Authority Collected Municipal Waste Management Statistics – Quarterly Provisional Estimates for January to March 2015, Northern Ireland Environment Agency – Department of Agriculture, Environment and Rural Affairs, July 2016.* *(https://www.daera-ni.gov.uk/sites/default/files/publications/daera/lac-municipal-waste-q4-2015-16.pdf)*

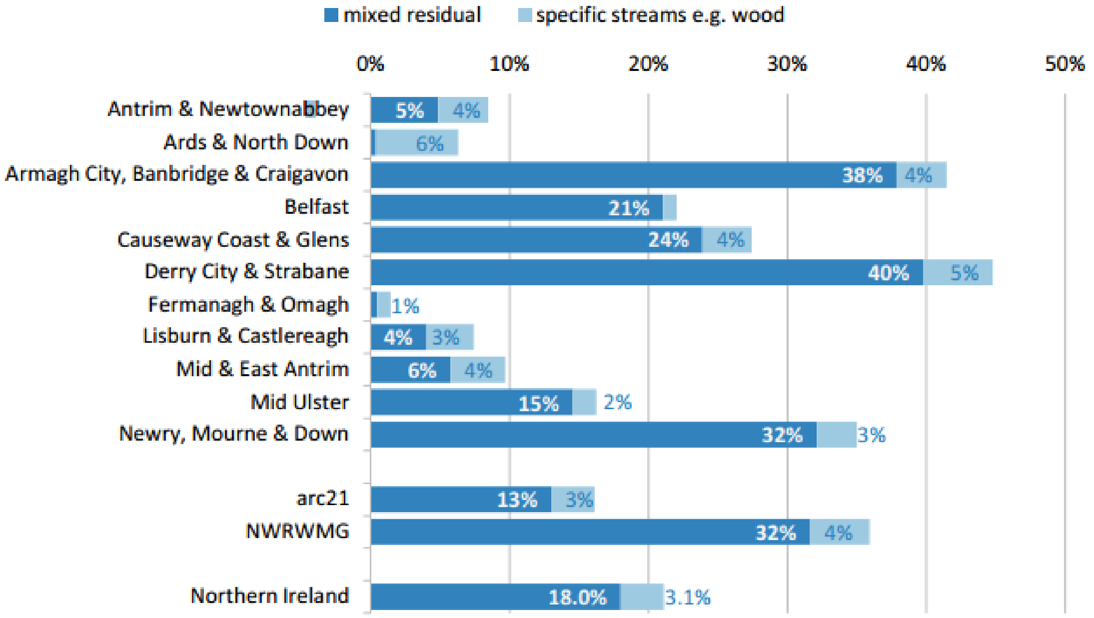
8.46 It should be noted that the composting rate varies considerable during the year due to increased amounts of garden waste during summer months. Composting can also vary throughout the urban/rural distribution within a single council area.

8.47 In relation to this, the Council's Corporate Improvement Plan for 2016-2017 explains that the development of a new Materials Recycling Facility (MRFs) sector in NI has opened up new waste treatment options which reduce the amount of waste being landfilled through new recycling and recovery techniques. In order to use these new MRFs for commercial waste, the Council needs to remove the food and garden waste from the rubbish and to do, this businesses in the legacy Newtownabbey area will be offered an organic waste collection service. A similar recycling service is already in operation in the Antrim area.

8.48 The Council's Corporate Improvement Plan for 2016-2017 further explains that the recycling markets have been developing over the years and waste items that were previously not economically viable to recycle can now be processed alongside the main paper, card and metal packaging. Plastic bottles have been collected in the dry recyclables bin in the Antrim area for over five years but following the award of a new processing contract, our contractor can now accept plastic pots, tubs, and trays.

8.49 The quarterly report also discusses waste energy recovery. This is combustible residual waste collected from the kerbside and civic amenity sites and processed into refuse derived fuel at material recovery facilities. Little waste was treated in this manner prior to 2009; however the industry as a whole in NI has seen a steady growth. Figure 8.7 illustrates how the Borough is somewhat behind in this area of recycling.

**Figure 8.7: Energy Recovery Rates by LGD & Waste Management Group**




*Source: Northern Ireland Local Authority Collected Municipal Waste Management Statistics – Quarterly Provisional Estimates for January to March 2015, Northern Ireland Environment Agency – Department of Agriculture, Environment and Rural Affairs, July 2016.*
*(https://www.daera-ni.gov.uk/sites/default/files/publications/daera/lac-municipal-waste-q4-2015-16.pdf)*

8.50 The specific streams element of energy recovery is mostly wood but also includes furniture, carpets and mattresses, mostly collected from civic amenity sites. The quarterly report explains that while generating energy from waste by incineration is preferable to landfill, preparing waste for reuse, dry recycling and composting are preferable to both.

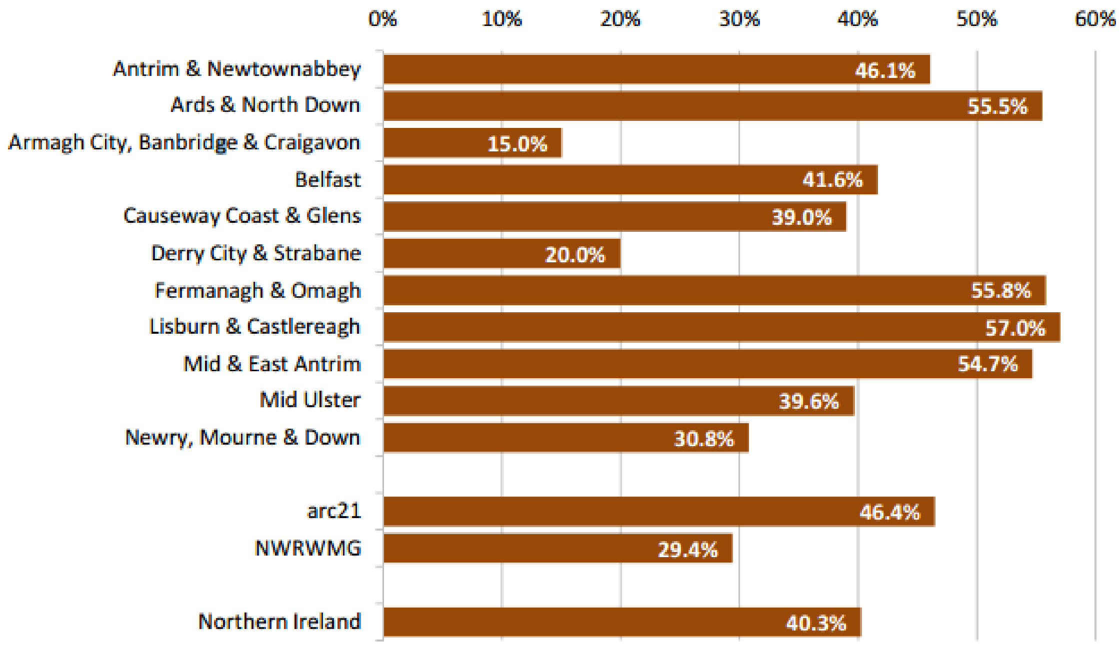
8.51 Anaerobic digestion (AD) is another aspect of waste energy recovery. However this particular industry remains small scale within NI and any energy generated is viewed as a by-product. This is discussed within the energy section of this evidence paper. The main purpose of this technology in NI is sustainable waste disposal. Six AD plants have been approved since 2011 (none prior to that), and all are located within the rural Crumlin area. These are at the smaller end of the AD scale, where the plants are developed to treat agricultural waste from single large farms, or a group of neighbouring farms. They may be as a result of the DARD Biomass Processing Challenge Fund, which was launched in 2010 and offered grants for on-farm biomass fuelled renewable energy technologies. In instances where the plant may only produce enough energy to operate the AD, it is still a beneficial process as it does not require energy from the Grid to process farm waste into a fertiliser.

8.52 The AD industry within NI is in infancy. To research and promote the process, the Agri-Food and Biosciences Institute have commenced a project to consider the potential of the small scale on-farm AD in NI as a future strategy for managing farm waste, together with the production of renewable energy.

8.53 AD proposals raise a number of planning issues including visual and landscape impacts arising from industrial scale plant/buildings; potential odour impacts, air emissions, noise impacts, watercourse pollution, and traffic impacts.

8.54 The report confirms that the long term trend of waste sent to landfill continues to decrease. The latest quarterly landfill rate for household waste in NI was only 40.3%, which is a further reduction on the 47.0% recorded during the same three months of 2015. The report includes the following chart (Figure 8.8) which shows how the Borough is performing in comparison with other NI councils.

**Figure 8.8: Household Waste Landfilled by LGD Waste Management Group**




*Source: Northern Ireland Local Authority Collected Municipal Waste Management Statistics – Quarterly Provisional Estimates for January to March 2015, Northern Ireland Environment Agency – Department of Agriculture, Environment and Rural Affairs, July 2016.*
*(https://www.daera-ni.gov.uk/sites/default/files/publications/daera/lac-municipal-waste-q4-2015-16.pdf)*

**Key findings**

8.55 The evidence presented in this section has led to the identification of the following key findings:

- The RDS promotes the adoption of the Waste Hierarchy and the proximity principle in order to manage our waste in a sustainable manner and to minimise the environmental impacts associated with waste management.
- The SPPS sets out the following regional strategic objectives:
    - To promote development of waste management and recycling facilities in appropriate locations'
    - To ensure that detrimental effects on people, the environment, and local amenity associated with waste management facilities are avoided or minimised; and
    - To secure appropriate restoration of proposed waste management sites for agreed after-uses.
- The Council is responsible for the management of municipal waste collection in the Borough, and operates five recycling centres;
- Antrim and Newtownabbey Borough Council is one of six councils in the east of NI which is part of the arc21 waste management group. Arc21 works on behalf of its member councils to guide, support and help them meet their legal requirements (under Article 23 of the Waste and Contaminated Land (NI) Order 1997), and drive forward innovative waste management programmes. Being part of arc21 will ensure the Council operates a co-ordinated approach to waste management with its neighbouring councils;
- The Council believes it has potential access to the necessary waste infrastructure to meet its current legislative targets in 2020, however the recent UK decision to leave the European Union may impact upon the accessibility of infrastructure based in continental Europe;
- The Council must adhere to DAERA's Waste Management Duty of Care Code of Practice, and the LDP must take account of this commitment;
- The Northern Ireland Local Authority Collected Municipal Waste Management Statistics – Annual Report 2014/15 indicates that:
    - , the NI landfill rate has significantly decreased from 72.3% of all LAC municipal waste in 2006/07 to 42.7% in 2014/15.
    - 53.1% of all municipal waste collected by the legacy Antrim Borough Council, and 44.1% of that relating to the former Newtownabbey Borough Council, was subsequently recycled or composted.

### Next Steps

8.56 The Council's Planning Section will continue to collect/update, and analyse data and trends with particular regard to waste management in the context of the Borough and Northern Ireland. Any updates to statistics, and other relevant strategies will be reflected in subsequent research.

# 9 Energy

9.1 This section relates to the topic of energy, and identifies, collates, and discusses evidence comprising with:

- Regional Policy Context;
- Existing Development Plans and Operational Planning Policy
- Other Relevant Strategies/Legislation;
- Current Energy Position in Northern Ireland;
- Energy Consumption and Generation;
- Planning Approvals;
- Key Findings; and
- Next Steps.

9.2 The future of energy related planning policy largely focuses on renewable and low carbon energy sources. Renewable energy is generally defined as energy that comes from resources which are naturally replenished on a human timescale, such as wind, rain, tides, waves, and geothermal heat. Greater use of renewable energies will reduce our dependence on imported fossil fuels. In turn this should reduce consumer costs and lessen climate change. While natural gas is a fossil fuel, it is seen as a low carbon and clean energy source.

**Regional Policy Context**
**Everyone's Involved – Sustainable Development Strategy**

9.3 One of the six Priority Areas for Action identified in the SDS relates to '*Ensuring reliable, affordable and sustainable energy provision and reducing our carbon footprint.*' Objectives within this Priority include the need to reduce greenhouse gas emissions, increase the proportion of energy derived from renewable sources, implement energy efficiency measures (particularly for vulnerable groups), increase energy security, and adapt to the impacts of climate change.

**Regional Development Strategy (RDS) 2035 – Building a Better Future**

9.4 With regard to Regional Guidance (RG) and Spatial Framework Guidance (SFG), the RDS seeks to deliver a sustainable and secure energy supply (RG5) and to reduce Northern Ireland's carbon footprint and facilitate mitigation and adaptation to climate change whilst improving air quality (RG9) through the use of renewable energy sources, facilitating more energy efficient buildings, and the use of more energy efficient transport modes.

9.5 The RDS acknowledges that the development of renewable energy sources in Northern Ireland is vital to increase energy security, help combat climate change, and achieving renewable energy targets.

**Strategic Planning Policy Statement for Northern Ireland (2015)**

9.6 The SPPS acknowledges that Northern Ireland has significant renewable energy resources and a vibrant renewable energy industry that makes an important contribution towards achieving sustainable development, in addition to job creation and investment.

9.7 The policy approach, outlined within the SPPS with regard to renewable energy, is to facilitate the siting of renewable energy generating facilities in appropriate locations within the built and natural environment in order to achieve targets and realise the benefits of renewable energy without compromising other environmental assets.

9.8 The Regional Strategic Objectives for renewable energy relate to:

- Ensuring the impacts associated with renewable energy development are adequately addressed;
- The provision of protection of built, natural and cultural heritage features throughout Northern Ireland; and
- Facilitating the integration of renewable energy technology into the design, siting and layout of new development, whilst also promoting the greater application of the principles of Passive Solar Design.

9.9 The document states that councils should set out policies and proposals in their LDPs that support a diverse range of renewable energy development, including the integration of micro-generation and passive solar design. LDPs must take into account the above-mentioned aim and regional strategic objectives, local circumstances, and the wider environmental, economic and social benefits of renewable energy development.

**Existing Development Plans and Operational Planning Policy**

9.10 The Antrim Area Plan is silent on the topic of renewable energy, as it was not a key planning issue at the time of it's the Plan's publications. With regard to electricity, the AAP states that the existing high voltage system is satisfactory to deal with the majority of the expected development to the end of the Plan period.

9.11 The Belfast Metropolitan Area Plan, in the Plan Strategy and Framework, refers to the Strategic Energy Framework which outlines the future of Northern Ireland's energy generation and supply over the period up to 2020. This Framework is discussed later in this section. The BMAP outlines the extent of the energy and acknowledges that the role of renewable energy is likely to increase over the Plan period.

9.12 Current Operational Planning Policy with regard to energy is contained within Planning Policy Statement 18: Renewable Energy (PPS 18), and Planning Policy Statement 21: Sustainable Development in the Countryside (PPS 21). Until a new Plan Strategy is adopted by Council, transitionary measures allow for the retention of the policy provisions contained within PPS 18 and PPS 21.

9.13 PPS 18 sets out the policy direction for development that generates energy from renewable resources. It encourages the integration of renewable energy technology and greater application of the principles of Passive Solar Design in the design, siting and layout of new development. Operational planning policy with regard to renewable energy include:

- Policy RE 1 – Renewable Energy Development; and
- Policy RE 2 – Integrated Renewable Energy and Passive Solar Design.

9.14 PPS 18 is supplemented by best practice guidance which provides background information on various renewable energy technologies, and draws upon advice and guidance from other parts of the UK and the Republic of Ireland. The guidance, which is to be read in conjunction with PPS 18, relates to technologies with regard to:

- Wind Energy;
- Biomass;
- Energy From Waste (Biological and Thermal Processes);
- Small Hydro;
- Active Solar (Photovoltaics);
- Solar Thermal (Solar Water Heating);
- Ground, Water and Air Source Heat Pumps; and
- Passive Solar Design.

9.15 The primary aim of PPS 21 is to manage development in the countryside in a manner which strikes a balance between the need to protect the countryside from unnecessary or inappropriate development, whilst supporting rural communities. It sets out planning policies and main planning considerations in assessing proposals for development in the countryside. Operational planning policies with relevance to the issue of energy include:

- Policy CTY 1 – Development in the Countryside.

**Anaerobic Digestion (2013)**

9.16 In 2013, DOE launched this draft Supplementary Planning Guidance (SPG) public consultation document, which was to be read in conjunction to PPS 18.

Energy. It discussed the topic in a context of planning policy and examined relevant issues. Work has not progressed to an adopted document.

**Wind Energy Development in Northern Ireland Landscapes (2010)**

9.17 This NIEA SPG was also to be read in conjunction with PPS 18 Renewable Energy. It was based on the sensitivity of NIs landscapes to wind energy development and contains an assessment of each of the 130 Local Landscape Character Areas by referencing the characteristics and associated values.

**Active Peatland and PPS 18 (NIEA)**

9.18 This Development Management Team Advice Note was published as a guide for NIEA officers on the identification of active peatland in relation to PPS 18. It confirms the definition of 'active' as meaning 'still supporting a significant area of vegetation that is normally peat forming'.

**Other Relevant Strategies/Legislation**
**Envisioning the Future: Considering Energy in NI to 2050**

9.19 The DETI 2050 Vision is intended to guide thinking on what can be achieved by 2050 and what early decisions and activities may be needed to support development towards that date. The study focused on three key parts of the energy sector – electricity, heat and transport. Conclusions included a switch to renewable energy as the main form of electricity generation; a move to renewable heat; improved efficiency of buildings, industry processes, light and appliances; and uptake of electric vehicles, plug in hybrid vehicles and fuel cell vehicles.

**Strategic Energy Framework (2010)**

9.20 The goals of this DETI Framework are building competitive markets; ensuring security of supply; enhancing sustainability; and developing our energy infrastructure. It confirms a target of achieving 40% of NIs electricity consumption from renewable energy sources by 2020.

9.21 The Framework is to be supplemented with a number of more specific DETI Action Plans, such as that detailed below.

**Strategic Energy Framework 2010-2020 Review and Refresh**

9.22 DETI has undertaken public engagement, with a view to publishing a review of its original Strategic Energy Framework 2010. Planning Officers should remain watchful for this review being finalised. One of the most significant accomplishments since the SEF was published in 2010 is meeting the

Programme for Government target for 20% of our electricity to be generated from renewable sources by 2015.

**Sustainable Energy Action Plan 2012-2015 and beyond (2012)**

9.23 This DETI Action Plan outlines the various initiatives being undertaken by the NI Executive. It sets out actions with set timeframes, and the Department responsible.

**Renewable Energy Action Plan (2010)**

9.24 This Action Plan (produced by DARD) sets out a framework of recommendations which aim to support the land-based sector to further develop renewable energy opportunities. The Action Plan calls for opportunities to exploit sustainable scale anaerobic digestion (AD) and its associated technologies as well as exploiting the opportunities for renewable heat produced by AD.

9.25 The Action Plan has been updated with an Interim report for 2013/14, which shows progress to date.

**Current Energy Position in Northern Ireland**

9.26 Northern Ireland has three major fossil-fuel based electricity generating plants (Ballylumford, Coolkeeragh, and Kilroot) and a number of renewable generators (mostly from wind energy) which make up indigenous electricity production. NI also has interconnection with the Scottish Grid (the Moyle Interconnector) and the Republic of Ireland Grid (the North-South Interconnector, which currently operates with a limited degree, and is proposed to be enhanced by the new Tyrone-Cavan transmission connection, as mentioned later in this section).

9.27 The electricity industry in NI operates a single wholesale market across the whole of the island of Ireland and this is known as the Single Electricity Market (SEM). This means that all electricity across the island is bought and sold through a single pool, which has increased competition, efficiency and security of supply (http://www.uregni.gov.uk/electricity/market_overview).

9.28 DETI explains that a redesign of the SEM is required because of changes to European legislation that are designed to harmonise cross border trading arrangements across all European electricity markets. The new wholesale market will be known as the Integrated Single Electricity market (I-SEM).

9.29 Northern Ireland Electricity (NIE) owns and maintains the electricity network in NI. Following a European Commission decision with respect to responsibility for planning investments for the NI electricity transmission network, NIE Networks transmission investment planning activities transferred to the Systems Operator NI (SONI) in 2014.

9.30 NIE work to a five year investment plan as agreed by the Utility Regulator. These plans include maintenance and upgrading works, as well as major projects for network expansion to meet future infrastructure needs.

9.31 Although NI relies heavily on fossil fuels, short, medium and long term plans have been developed to reinforce the electricity transmission network for connecting energy from renewable sources. Parallel to these infrastructure plans, NIE have developed a plan to connect wind farms to the electricity network in groups. These 'clustered' connections will reduce the number and length of new overhead lines needed for the connections. NIE are also investing in smart meters and smart grid technology.

9.32 A current major project is the 'Tyrone-Cavan Interconnector'. This is a cross border project requested by the utilities regulators and governments both in NI and the Republic of Ireland. The project will upgrade the North-South Interconnector to ensure the effective operation of an 'all island' electricity market, to support the realisation of strategic renewable energy targets and to reduce customer costs.

9.33 In terms of natural gas, the DETI explained how it was first introduced to NI via the Scotland to NI gas pipeline in 1996. Today there are a number of regulated suppliers within the Borough, with mains networks in Metropolitan Newtownabbey, Antrim town, and Ballyclare. In 2011, 19% of households in the Borough heated their homes with this energy source. As natural gas is the least polluting fossil fuel and seen as a low-carbon source, extending the natural gas network to further areas can help reduce greenhouse gas emissions. Those customers who are not on the natural gas grid can avail of Liquified Petroleum Gas (LPG) as an alternative.

9.34 In 2011, 65% of households in the Borough heated their homes using home heating oil. This oil market in NI is not regulated and consumers have a wide choice of suppliers.

9.35 Aside from the electricity and gas networks, energy provision for both domestic and non-domestic use may be alternatively sourced or supplemented directly from small scale renewable energy generation. While these resources are currently small scale, they reduce dependency on imported fossil fuels and in turn, this should reduce consumer costs and lessen climate change.

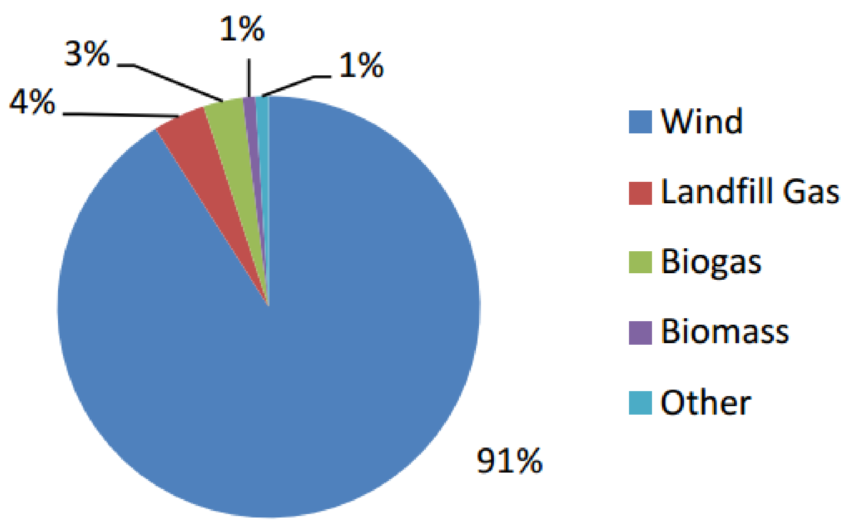
**Energy Consumption and Generation**

9.36 The most recent statistics from the Department for the Economy (DfE), formerly the Department for Enterprise, Trade and Investment (DETI), are contained within the Electricity Consumption and Renewable Generation Statistics report[8]. This report deals: with Northern Ireland as a whole, and states that for the twelve month period January 2015 to December 2015, 25.4% of total electricity consumption in NI was generated from renewable sources located in NI. This represents an increase of 6.4 percentage points on the previous 12 month period (January 2014 to December 2014) and is the highest rolling 12 month proportion on record.

9.37 The report further states that in December 2015, 38.2% of total electricity consumption in NI was generated from renewable sources located in NI. This is higher than the corresponding figure for the previous month (21.6% in November 2015) and higher than the corresponding figure for the same month one year ago (23.5% in December 2014) and is the highest monthly proportion on record.

9.38 Of all renewable electricity generated within NI over the 12 month period January 2015 to December 2015, 91.1% was generated from wind. A number of other renewable sources contribute to the overall total as shown in Figure 9.1 below.

**Figure 9.1: Renewable Electricity Generation by Type of Generation (January 2015 to December 2015)**




Other includes Hydro, Tidal, Combined Heat & Power (CHP) and Photovoltaic (PV)

9.39 In terms of the volume of electricity consumption between January 2015 and December 2015, approximately 7,819 Gigawatt hours (GWh) of total electricity

[8] Electricity Consumption and Renewable Generation Statistics https://www.economy-ni.gov.uk/publications/electricity-consumption-and-renewable-generation-northern-ireland-april-2015-march-2016

was consumed in NI. Of this, some 1,984 GWh (25.37%) was generated from renewable sources within Northern Ireland.

**Energy in Northern Ireland Report (2016)**

9.40 The Energy in Northern Ireland Report[9], is published by the Analytical Services Unit within DETI. This is a new publication (first published in March 2016), which aims to provide an overview of key statistics and information relating to energy in NI. The report examines: the economic contribution of energy to the local economy; electricity generation, transmission, distribution and supply; renewable electricity generation; total energy consumption; and energy and the consumer. As this report is a new initiative, the frequency of reviews or updates has yet to be determined.

9.41 The report explains how in each year 2004-2013, NI was a net exporter in terms of electricity trades with the Republic of Ireland (via the North-South tie-lines). However in 2014, NI imported more electricity from the Republic of Ireland than it exported (although such imports and exports totals are relatively small accounting for only a small proportion of overall consumption of electricity).

9.42 The report continues to explain that NI is a net importer of electricity from Scotland (via the Moyle interconnector). Transfers of electricity from this interconnector are significant, accounting for almost 14% of total electricity consumption in NI in 2014. Indeed, between 2009 and 2013 around one quarter of all electricity consumed in NI was via transfers from Scotland.

9.43 Turning to renewable energy, the report states that the annual proportion of electricity consumption from renewable sources in NI has risen considerably in recent years, from 8.4% in 2010 to 25.4% in 2015. Wind is the dominant source of renewable electricity generation in NI accounting for around 90% of installed capacity and volume generated. Such reliance on this source does mean that monthly renewable electricity generation volumes in NI can be prone to large fluctuations, due to changing weather conditions (Energy in NI 2016, DETI).

**Department of Energy and Climate Change (DECC)**

9.44 The DECC regularly publishes statistics on energy consumption. The most recent data was for 2013-2014, and shows interesting trends for both domestic and non-domestic energy consumption.

9.45 The Northern Ireland Energy Consumption statistics[10], show that, in terms of domestic consumption in the legacy Antrim Council area, average

[9] The Energy in Northern Ireland Report, DETI, 2016
https://www.economy-ni.gov.uk/sites/default/files/publications/deti/energy-northern-ireland-2016.pdf

[10] Northern Ireland Energy Consumption Data
https://www.gov.uk/government/collections/northern-ireland-electricity-consumption-data

consumption per meter was higher than the NI average, while in Newtownabbey average consumption per meter was lower than the NI average. The Energy in NI 2016 paper attributes the wider availability of gas in the greater Belfast area for heating of homes, as a reason for the lower electricity consumption figures in such areas.

9.46 However in the non-domestic sector the greatest differences occur, with Antrim average consumption being significantly above NI average and amongst the largest in NI. This indicates individual large consumers operating within the area. In Newtownabbey although still above the NI average, the average consumption per meter is much lower. These trends point to a more residential bias in terms of Newtownabbey and more business bias in terms of Antrim.

**Protection of Natural and Built Heritage**

9.47 As mentioned earlier in this section, the SPPS requires local development plans to take account of regional objectives to ensure that the environmental, landscape, visual and amenity impacts associated with or arising from renewable energy development are adequately addressed. A further objective is to ensure adequate protection of the region's built, natural, and cultural heritage features. There is the need to facilitate the integration of renewable energy technology into the design, siting and layout of new development and promote greater application of the principles of Passive Solar Design.

9.48 The Department of Agriculture, Environment and Rural Affairs (DAERA) can provide evidence on the Borough's built and natural heritage. Considering how even renewable energy development can have positive and negative impacts on the environment, the new LDP needs to ensure development occurs in a sustainable manner.

9.49 DAERA evidence will be largely based on work completed by the former NIEA, and will include their Northern Ireland Regional Landscape Character Assessment and the Northern Ireland Local Landscape Character Assessment series. Specific issues that are mentioned include how the landscape is able to absorb solar farms on the flat land around Crumlin, as well as the need to determine the potential for upland areas within the Borough to absorb wind energy developments, particularly along ridge lines. It is noted how major transition lines radiate out from Kilroot and Ballylumford power stations in paths of steel towers. Upgrades or alterations to these overhead lines could have impacts on the landscape and visual amenity of the Borough's hills and valleys.

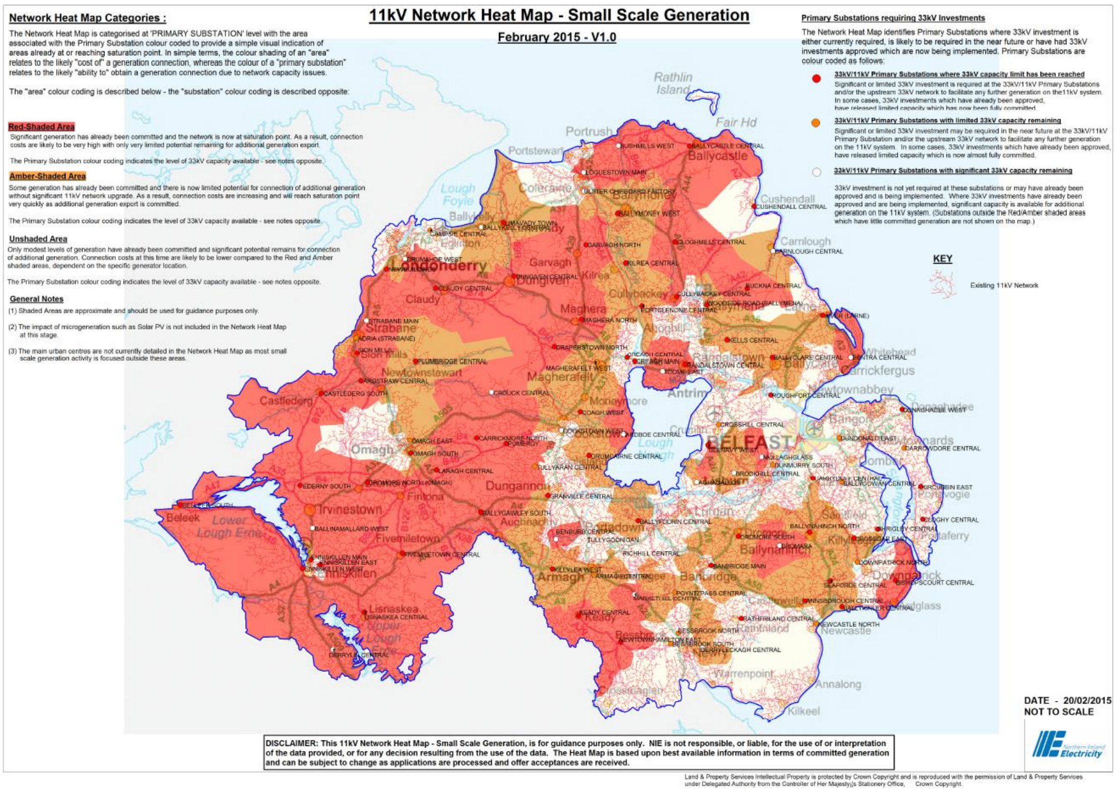
9.50 DAERA also hold a wealth of detailed information on environmental designations and protected areas, such as Special Areas of Conservation, Special Protection Areas, Areas of Special Scientific Interest, Local Landscape

Policy Areas, and so on. The identification of these areas will ensure the right sustainable energy development is occurring in the most appropriate places.

### NIE Networks

9.51 NIE Networks produces a heat map to illustrate areas where there may be limited capacity of the 11kV network to accept further small scale energy generation. The latest heat map is shown below in Figure.9.2.

**Figure 9.2. NIE 11Kv Network Heat Map for Small Scale Generation**




*Source: NIE Networks*
*(http://www.nienetworks.co.uk/documents/Generation/SSG_HeatMap_200215_V1.aspx)*

9.52 While the heat map is for illustrative purposes only, and shaded areas are approximate, it is nevertheless a valuable evidence resource to refer to when considering the location of energy development. Another factor to consider is that main urban centres are not currently detailed on the heat map as most small scale generation activity is focused outside these areas.

9.53 From this latest version, it is possible to get a picture that the majority of the Borough has significant potential for connection of additional generation. However, parts of the northeast could have limited potential, and a substantial section of the northwest appears to have reached saturation point.

9.54 The heat map also identifies primary substations which require 33kV investments. There are five primary substations within the Borough, three of which have reached their capacity limit and require investment to facilitate further generation on the 11kV system.

### Energy from Minerals

9.55 Detailed consultations with DETI/GSNI will provide data on the Borough's capacity for energy from mineral resources such as ground water / geothermal technologies, as well as the extraction of minerals through quarrying. The geology underlying the Borough contains a wide range of mineral resources.

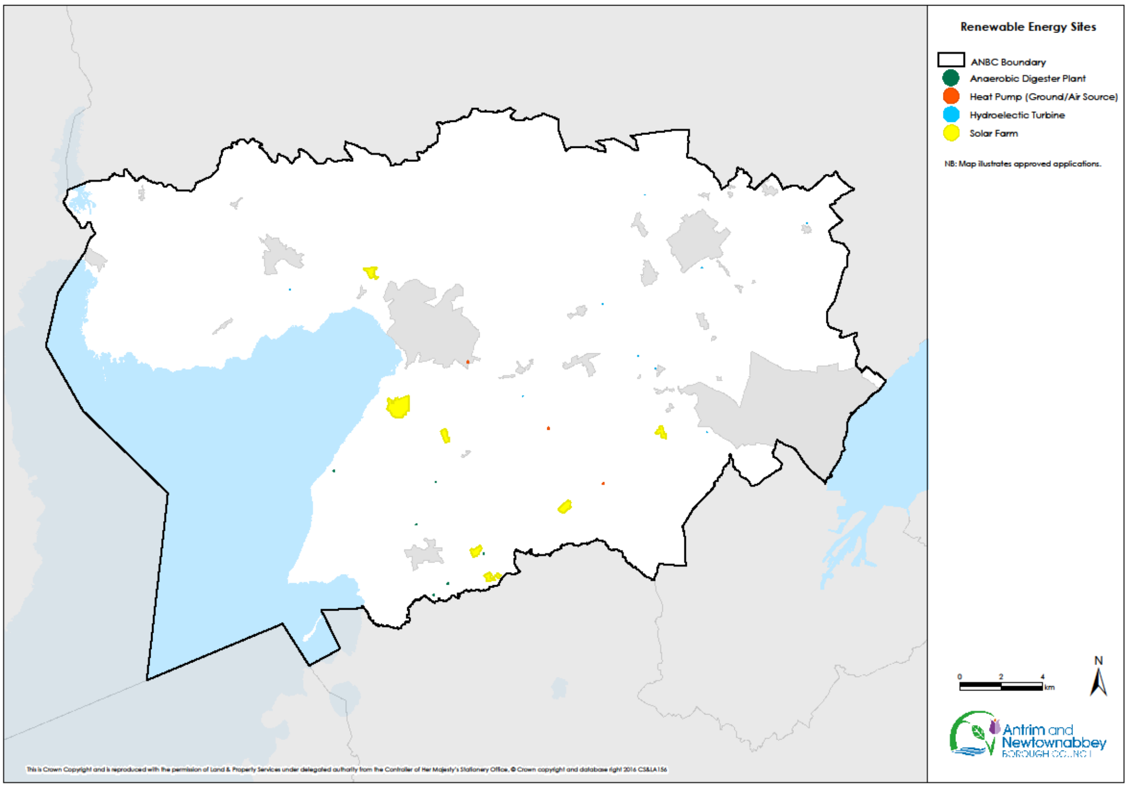
9.56 These include perlite, sand and gravel, lignite, with pockets of sandstone, limestone, igneous/meta-igneous rocks (suitable for crushed rock aggregate), peat, aluminium, iron, and groundwater (including geothermal potential). There is also interest in oil and gas exploration. There may be potential for unconventional shale gas production within the Lough Neagh basin. However, the distribution of shales at depths suitable for shale gas production is unknown because few exploration wells have been drilled.

9.57 This topic is specifically considered within the Minerals section of this Evidence Paper.

### Planning Approvals

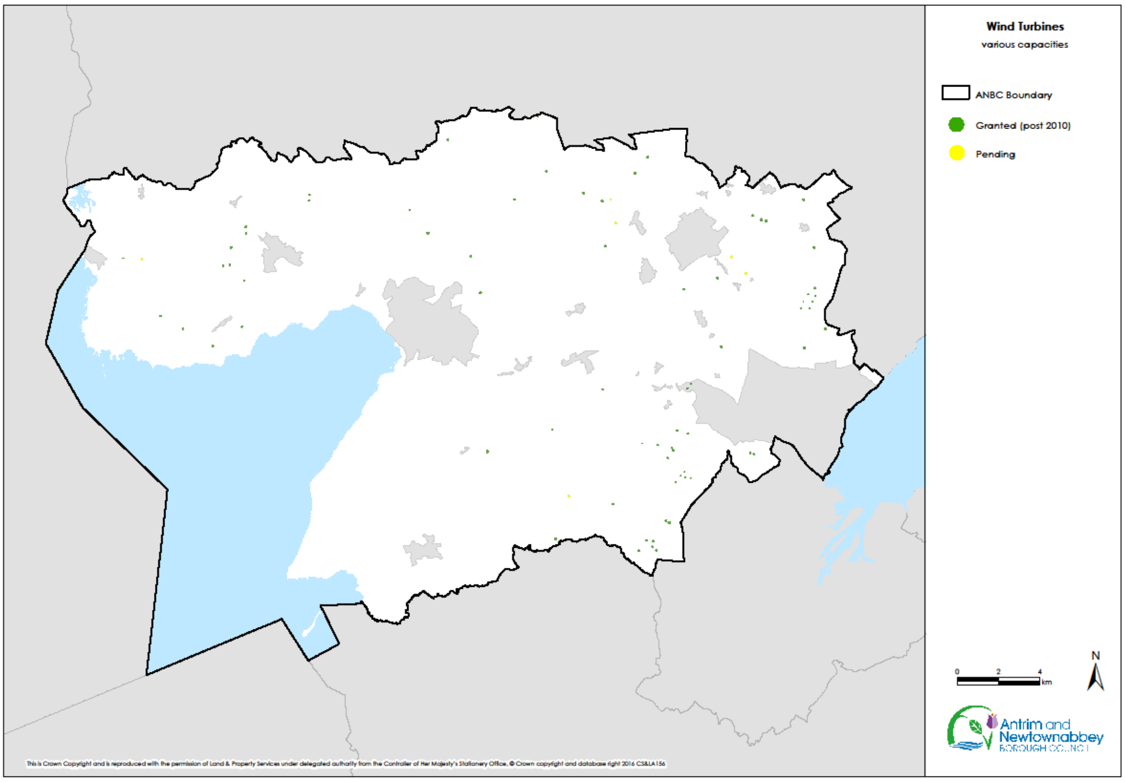
9.58 Examining approved energy related development schemes offers a picture of what is happening within the Borough and what opportunity for future energy exploitation remains. Figures 9.3 and 9.4 illustrate the various approved schemes and their location.

**Figure 9.3: Approved Renewable Energy Developments**




9.59 Figure 9.3 (above) illustrates how approved renewable energy development has been drawn to the south of the Borough, around the rural Lough Neagh lowlands. This corresponds with areas of electric connection potential on the NIE small generation heat map, mentioned earlier in this report. This area also contains Belfast International Airport and as such the unacceptable effects of wind and solar energy development (including effects on aircraft safety, aircraft navigation equipment, and electro-magnetic interference) must be carefully considered by experts in that field.

**Figure 9.4: Approved and Pending Wind Turbines**




9.60 Figure 9.4 (above) demonstrates how wind turbines have a tendency to cluster, especially in exposed upland areas towards the east of the Borough. These areas also tend to be highly visible from the surrounding area and a sensitive approach in the turbines placement is required.

**Anaerobic Digestion**

9.61 As anaerobic digestion (AD) is primarily regarded as a waste treatment facility, that aspect is considered within the Waste Management section of this Evidence Paper. Here, the energy by product is examined.

9.62 The process of AD provides a source of renewable energy as the waste is broken down to produce biogas, which is a mixture of around 60% methane, 40% carbon dioxide and traces of other gases. The biogas can be burned in a boiler or Combined Heat and Power (CHP) plant to generate renewable heat and/or electricity. It may also be upgraded to pure methane and used as a bio-fuel (sometimes referred to as bio-methane) that may be injected into the gas grid to provide heat and power, or condensed for use as a renewable fuel for transport. One cubic metre of biogas at 60% methane content converts to 6.7kWh of energy.

9.63 In terms of energy, the benefits of AD are that it contributes towards meeting Government targets in relation to renewable energy and greenhouse gas emissions. It is also an opportunity to utilise NI's natural resources to enhance security of energy supply and reduce reliance on importing energy.

9.64 AD plants can be developed at a range of scales in order to meet specific waste disposal and energy generation requirements. The map at figure X, shows that six anaerobic digestion plants have been approved since 2011 (none prior to that), and are all located within the rural Crumlin area. These are at the smaller end of the AD scale, where the plants are developed to treat agricultural waste from single large farms, or a group of neighbouring farms. They may be as a result of the DARD Biomass Processing Challenge Fund, which was launched in 2010 and offered grants for on-farm biomass fuelled renewable energy technologies. In instances where the plant may only produce enough energy to operate the AD, it is still a beneficial process as it does not require energy from the Grid to process farm waste into a fertiliser.

9.65 In NI as a whole, energy production from AD remains low and small scale. In fig. x above, we see that only 3% of electricity produced from renewable sources in NI is from biomass sources. The AD industry within NI is in infancy. To research and promote the process, the Agri-Food and Biosciences Institute have commenced a project to consider the potential of the small scale on-farm AD in NI as a future strategy for managing farm waste, together with the production of renewable energy.

9.66 AD proposals raise a number of planning issues including visual and landscape impacts arising from industrial scale plant/buildings; potential odour impacts, air emissions, noise impacts, watercourse pollution, and traffic impacts.

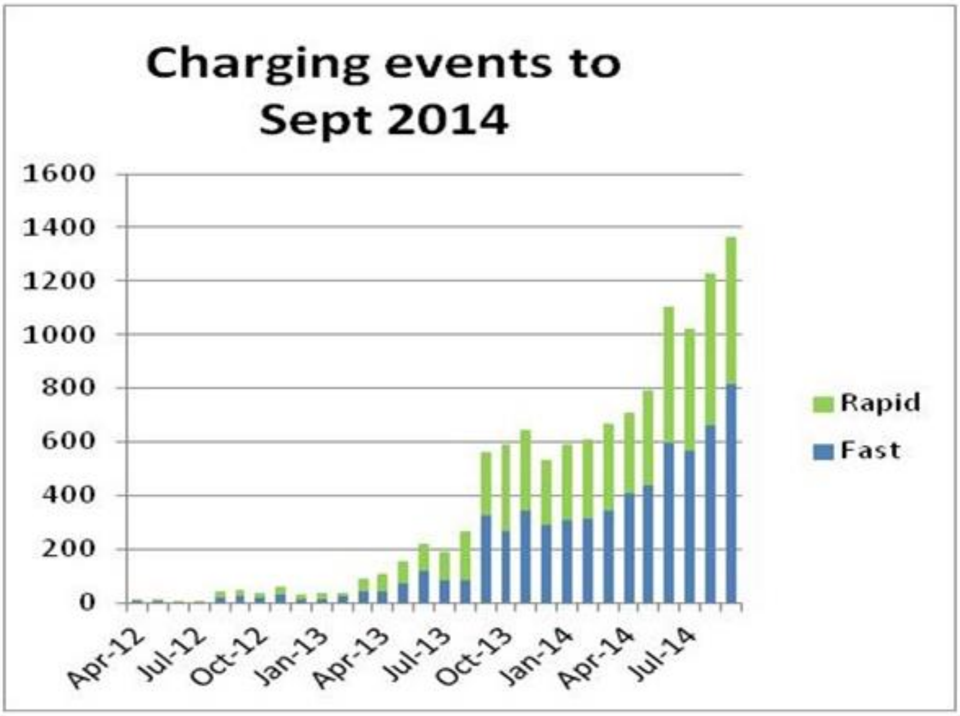
**Electric Vehicles**

9.67 The use of electric vehicles is a sustainable means to decarbonise transport. Ideally the vehicles would be powered using renewable energy sources. This is in keeping with the above mentioned policy objectives and targets.

9.68 Public electric vehicle (EV) charging accounts for 45%, whereas 55% of charging occurs at private points at the workplace or home (Ecarni, Sept 2014).

9.69 The DRD Ecarni scheme was set up to introduce public EV charging infrastructure to NI. The phased installation began in 2012 and ended in 2013. Under the Ecarni scheme 14 rapid charge points and 320 fast charge points have been installed in NI. Within the Borough they developed one rapid charge point (located at the M2 motorway services and 18 fast charge points which are located were urban areas. Figure 9.5 illustrates the dramatic increase in charging events throughout NI.

**Figure 9.5: eCar Charging Events**




*Source: ecarni.com*

9.70 The increase in demand has been as a result of infrastructure provision and the increasing ownership and variety of electric vehicles. Throughout NI, the introduction of rapid charging points has proved very popular. Latest figures (Sept 2014) show these rapid stations accounted for 47% of the total number of public network charging events.

9.71 In July 2015, the ecarni scheme was handed over to Electricity Supply Board (ESB). They are now responsible for the operation, maintenance and development of the public charge point network in NI. Since the handover, ESB have installed a further 1 rapid charge point (at Junction One) and a further 3 fast charge points within the Borough.

9.72 Planning policy can also facilitate private EV charging infrastructure at the workplace or within residential developments. In some instances where a new major development is likely to attract a greater number of car based journeys, it may be appropriate for planners to specify the installation of charging points. However, this would need to be applied sensibly to prevent onerous costs to developers and as a result discourage any development from taking place. The inclusion of active spaces (ready to use) or passive provision (providing the underlying infrastructure ready for activation at a future date) could be specified through the LDP. Passive provision is one means that would limit costs to developers.

9.73 Antrim and Newtownabbey Borough Council is leading the way in encouraging this sustainable form of transport by locating 7 charging points on their premises throughout the Borough.

**Key Findings**

9.74 The evidence presented in this section has led to the identification of the following key findings:

- The DETI Strategic Energy Framework (2010) confirms a target of achieving 40% of NIs electricity consumption from renewable energy sources by 2020;
- NI relies heavily on fossil fuels to meet energy needs, with 65% of the Borough's households heating their homes using oil;
- Renewable energy production is becoming more common; with the annual proportion of electricity consumption from renewable sources in NI rising considerably in recent years, from 8.4% in 2010 to 25.4% in 2015;
- Of all renewable electricity generated within NI over the 12 month period January 2015 to December 2015, 91.1% was generated from wind. Such reliance on this source does mean that monthly renewable electricity generation volumes in NI can be prone to large fluctuations, due to changing weather conditions;
- Natural gas mains connection is available in main urban areas, and in 2011 19% of the Borough's households heated their homes using this source;
- The majority of the Borough has significant potential for Grid connection of additional small scale energy generation. However, parts of the northeast could have limited potential, and a substantial section of the northwest appears to have reached saturation point;
- There are five primary substations located within the Borough, three of which have reached their capacity limit and require investment to facilitate further generation on the 11kV system;
- Approved renewable energy development has been drawn to the south of the Borough, around the rural Lough Neagh lowlands. Wind turbines have tended to cluster in exposed upland areas towards the east of the Borough;
- Anaerobic Digestion plants in the Borough are small scale, focusing on processing farm waste rather than a means of creating renewable energy; and

- The infrastructure network for charging electric vehicles has recently been developed within the Borough, although the public's interest and investment in electric vehicles remains low.

**Next Steps**

9.75 As the preparation of the Local Development Plan continues, the Council's Planning Section will collect, update and analyse data and trends with particular regard to energy supply, generation, and consumption both at a regional (Northern Ireland) level, and in the context of the Borough. Where updates or new sources of information are identified, these will be reflected in subsequent research.

Antrim and Newtownabbey
BOROUGH COUNCIL


ANTRIM CIVIC CENTRE
50 STILES WAY, ANTRIM BT41 2UB
**T** 028 9446 3113

MOSSLEY MILL
NEWTOWNABBEY BT36 5QA
**T** 028 9034 0000

www.antrimandnewtownabbey.gov.uk