

2026

Warrington
& Co.



Foreword

I'm pleased to introduce Warrington's 28th Annual Property Review, looking back on the last 12 months of activity within the town's property development and investment market.



Cllr Hans Mundry
LEADER
WARRINGTON BOROUGH COUNCIL

Economic success is hollow if it isn't reflected in the daily lives of our residents. It has been heartening to see our high street continue to defy the "decline" seen elsewhere. New shops, independent cafes, and vibrant restaurants are springing up across the borough, enriching our retail and leisure offer and ensuring that Warrington remains a destination of choice.

At the same time, our residential landscapes are evolving, with significant progress made this year on developments including the continued expansion of Omega South. We are also looking toward the horizon with the emerging proposals for the Fiddlers Ferry regeneration scheme, a project that promises to transform a former industrial landmark into a sustainable community for the future.

While the national conversation has often been dominated by stories of slow growth and economic stagnation, Warrington has consistently bucked the trend. Cities Outlook 2026 - the definitive annual health check for the UK's 63 largest cities and towns - places Warrington among the UK's best for growth in living standards, testament to the high-value jobs and robust economic foundations we have built here.

Our commitment to greener transport has reached a major milestone with the replacement of Warrington's Own Buses' entire diesel fleet with 105 state-of-the-art electric buses, directly improving air quality and providing greener, cleaner and more sustainable transport options throughout the borough.

"Warrington among the UK's best for growth in living standards"

This prosperity is underpinned by a healthy increase in the number of businesses choosing to call Warrington home. With unemployment rates remaining low and over £150 million of investment flowing into the town over the last year, primarily in our strongly performing industrial market, we continue to perform at a high level.

We're also using government Town Deal funding to invest in the cultural and digital future of Warrington. Our new Digital Enterprise Hub at St James Business Centre is already buzzing with activity, providing a vital platform for innovation, learning and growth. Meanwhile, work to transform our Pyramid theatre into a vibrant new cultural hub completes later this year.

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WARRINGTON TOWN CENTRE

Warrington's resilience is rooted in its geography, but our future is tied to our connectivity. We are thrilled that the government has confirmed its commitment to Northern Powerhouse Rail (NPR), officially cementing Warrington's status as a key transport hub for the North.

The planned new low-level station at Warrington Bank Quay will be transformational. Positioned as a vital link between Liverpool and Manchester, and providing seamless access to Manchester Airport, Chester, North Wales, and the West Coast Main Line, this project will unlock thousands of jobs and massive economic opportunities. It places Warrington at the very heart of one of the North's most important infrastructure projects in a century.

Looking ahead, the establishment of the Cheshire and Warrington Combined Authority marks a historic shift in how our region is governed. With the transfer of powers from Westminster, local people and leaders now have greater control over our destiny.

As we prepare for the election of our first Mayor in May 2027, the Combined Authority is set to unlock at least £650 million in funding over the next 30 years.

Our goal is ambitious but achievable: to transform this area into the UK's healthiest, most sustainable, and fastest-growing economy by 2045.

Warrington's continued success is the result of strong partnership work between our business sector, our residents, the Council, and our local and regional partners. Together, we have built a town that is resilient, innovative and ambitious.

These are exciting times for Warrington, and I look forward to us continuing to work together to deliver real, lasting success for our town, now and in the future.

Executive Summary

Economy

Warrington punches above its weight in terms of economic performance, including on measures of GVA growth, real disposable income and job creation. The town continues to attract key companies, including knowledge intensive businesses, and is a leader in economic performance across the North West.

As reported in the Centre for Cities Outlook 2026 report, real GVA increased by 41% between 2013 and 2023, the strongest proportional GVA uplift of any of the 63 cities and towns featured. Alongside this, real disposable income increased by 5.3%, with Warrington recognised as having the highest disposable income in the North of England.

GVA increased by 41% between 2013 and 2023

Business counts improved in 2025, with a net gain of 115 firms in Warrington, following several years of business failures outpacing business births. In difficult economic times, this reflects the attractiveness of Warrington as a business location and improved confidence in the local market. The number of knowledge intensive businesses has doubled since 2015, the strongest increase of any area in the UK. This expansion has contributed to Warrington recording the fourth lowest unemployment rate nationally at just 2.8%.

Warrington recently received national praise, with an article in The Guardian describing the town as a 'southern economy in the north'. The story boasted about the strength of Warrington's economic growth, rising living standards and utilisation of modern, high value sectors such as nuclear and advanced engineering. Drawing on analysis from the Centre for Cities report, the article emphasised Warrington as a shining example of resilience and economic progression relative to other Northern towns and cities.

To sustain this momentum, continued investment in education and skills will be important. Warrington still has a relatively high proportion of residents without formal qualifications, and improving skill levels will be key to supporting the ongoing growth of professional and knowledge based sectors within the local economy.

Investment

Investment activity remained strong in 2025, supported primarily by industrial transactions and several significant portfolio acquisitions involving national and international funds.

Around £151 million of property investment was recorded across 15 transactions. The industrial sector was again the main target for major investment, accounting for 10 deals and more than £110 million of investment.

High-profile industrial deals included the year's largest transaction, Canmoor's acquisition of the 35,000 sq m Warrington 379 at Dallam Lane for just under £40 million. Also, Orchard Street's purchase of the Taurus Park development at Gemini, sized over 12,500 sq m, for £23.65 million.

Portfolio activity was also evident, including Blackstone's acquisition of three industrial properties comprising over 19,000 sq m across the town centre, Woolston and Risley. Notably, Spire Hospital, Stretton was included in a national healthcare portfolio transaction to Primary Health Properties and was valued at £28.5 million.

Office

The office market recorded relatively stable levels of activity overall, with demand continuing to be driven by small and medium sized occupiers, alongside strong performance in out-of-town business park locations.

15,802 sq m of office floorspace was transacted across 28 deals above 200 sq m, broadly in line with the previous year's transaction volume. Total office floorspace saw an increase, reflecting a slightly larger higher deal size, with several larger transactions completed at Birchwood Park.

Prime rents increased to £279.86/sq m (£26/sq ft), achieved at 2 Trinity, Birchwood, on a 10-year lease to Opus Group, highlighting continued demand for the highest quality, fully fitted office space.

Birchwood dominated the office market, accounting for 70% of total take-up, reinforcing its position as the largest out-of-town office location in the North West.

The sub-200 sq m office market remained highly active, with 47 transactions recorded. This represents 68% more deals than the larger office market, demonstrating how Warrington's office market is now firmly dominated in volume by SMEs and flexible workspace occupiers.

Industrial

The industrial market continued to perform strongly despite a modest reduction in total floorspace compared with the previous year.

67,500 sq m of industrial floorspace was transacted across 39 deals, representing a 14% reduction in floorspace compared with 2024 due largely to fewer large-scale transactions.

The largest deal was the 39,135 sq m letting of In-durent 420 at Omega West to Regency Glass, which represented the largest manufacturing transaction in the UK during Q3 2025.

Smaller units continued to dominate activity, with almost 75% of transactions below 1,000 sq m, reflecting strong demand from SMEs.

Prime rents for smaller industrial units rose again, reaching £153.93/sq m (£14.30/sq ft) at Gemini 8, marking the third consecutive year that the location achieved the town's highest rents.



GEMINI 8

Retail and Leisure

Warrington's retail and leisure market continued to evolve during 2025 as operators responded to changing consumer spending patterns and growing demand for leisure and hospitality uses.

Six new retailers opened within Golden Square during 2025, including One Beyond, Kids Heaven and B&M relocating into the former Wilko unit.

The town centre food and beverage offer expanded with the opening of Taco Bell, Roast and The Dubliner alongside new independent cafés and restaurants.

Retail parks remained attractive locations for national operators, including the opening of an M&S Outlet store at Riverside Retail Park and further investment in the M&S store at Gemini Retail Park.

Leisure uses continued to diversify, with the growth of social sport facilities such as padel tennis and boutique fitness studios, reflecting wider national trends in leisure behaviour.

Residential

The residential market remained active during 2025, supported by healthy demand, strong local earnings and continued delivery of new housing developments across Warrington.

1,650 residential property sales were recorded during the year, representing a 7.7% increase compared with 2024.

The average house price rose to £275,650, slightly above the national average, reflecting Warrington's strong employment base and strategic location between Liverpool and Manchester.

591 net new dwellings were delivered during the 2024/25 monitoring period, with the majority occurring in Bewsey & Whitecross and Burtonwood & Winwick. When combined with delivery from the two previous years, the town has significantly exceeded the stepped housing delivery requirement of the Local Plan.

Major residential developments progressed across the town, including Omega South, the Peel Hall development in Orford, and emerging proposals for the Fiddlers Ferry and Cockhedge residential schemes.



HOLLY GRANGE DEVELOPMENT

Economy

Serves as a sketch of what places could do to achieve greater prosperity in the future

Warrington continues to punch above its weight in terms of economic performance, including on measures of GVA, real disposable income and job creation. The town consistently attracts key companies, including knowledge intensive businesses, and is a leader in economic performance across the North West.

The recently released Centre for Cities Outlook 2026 report presented Warrington as a town that “serves as a sketch of what places could do to achieve greater prosperity in the future” (Centre for Cities, 2026). Warrington led the country in terms of improving local prosperity. It was amongst 11 locations to have recorded an overall uplift in prosperity since the financial crisis of 2008.

Between 2013 and 2023, Warrington experienced one of the highest rates of combined growth in both economic output and household prosperity. Real GVA increased by 41% over the period, representing the strongest proportional GVA uplift of any area achieving improved prosperity. This was accompanied by a 5.3% increase in real disposable income per capita.

Furthermore, Warrington was identified as having the highest disposable income in the North of England and was the only area in the region where wages exceeded the UK average. Both economic and disposable income growth figures were 2.2 times the national average. Reflecting this performance, Warrington’s ranking for disposable income per capita improved from 19th to 14th out of 63 UK towns and cities over the decade period.

The Guardian describes the town as a ‘Southern economy in the north’

Warrington recently received national praise, with a recent article in The Guardian describing the town as a ‘southern economy in the north’. The article boasted about the strength of Warrington’s economic growth, rising living standards and utilisation of modern, high value sectors such as nuclear and advanced engineering. Drawing on analysis from the Centre for Cities report, the article emphasised Warrington as a shining example of resilience and economic progression relative to other Northern towns and cities.

Other economic achievements of Warrington noted in the report:

- Warrington *doubled* its knowledge intensive business services (KIBS) jobs between 2015 and 2024, the strongest growth of any UK city
- 5th highest 10-year jobs growth rate, with a *23.1% increase* from 2013-2023
- 4th lowest unemployment rate in 2025, sat at *2.8%*
- More than *half* of Warrington’s most deprived wards in 2010 are no longer in the *bottom fifth* of neighbourhoods nationally in 2025. Furthermore, *42%* of neighbourhoods in Warrington are now among the *20% least deprived* nationally
- Recorded the *2nd highest* ratio of private sector to publicly funded jobs, with a ratio of *4.6 (2024)*
- Ranked *8th* in business stock per *10,000* population, though business stock fell by *0.5%* from 2023 to 2024
- Warrington’s greenhouse emissions fell from *6.3 tonnes* in 2022 to *5.9 tonnes* in 2023, though still significantly higher than the *5.2 tonnes* UK average.

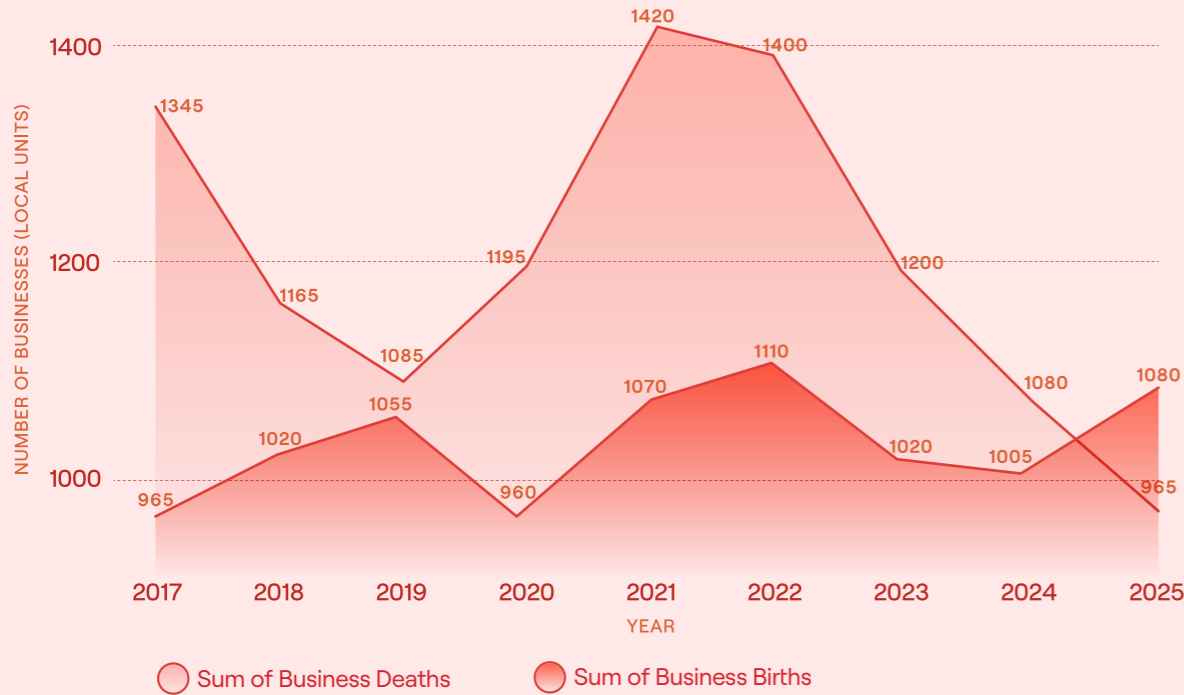
Main economic downfalls:

- Ranked *1st* for the highest proportion of residents with no formal qualifications (*13.6% in 2024*)
- Amongst the *10 slowest* growing cities by population (*ranked 56th*) from 2014 to 2024
- Ranked *8th* in business stock per *10,000* population (*2024*), though business stock fell by *0.5%* from 2023 to 2024.

Business Demography

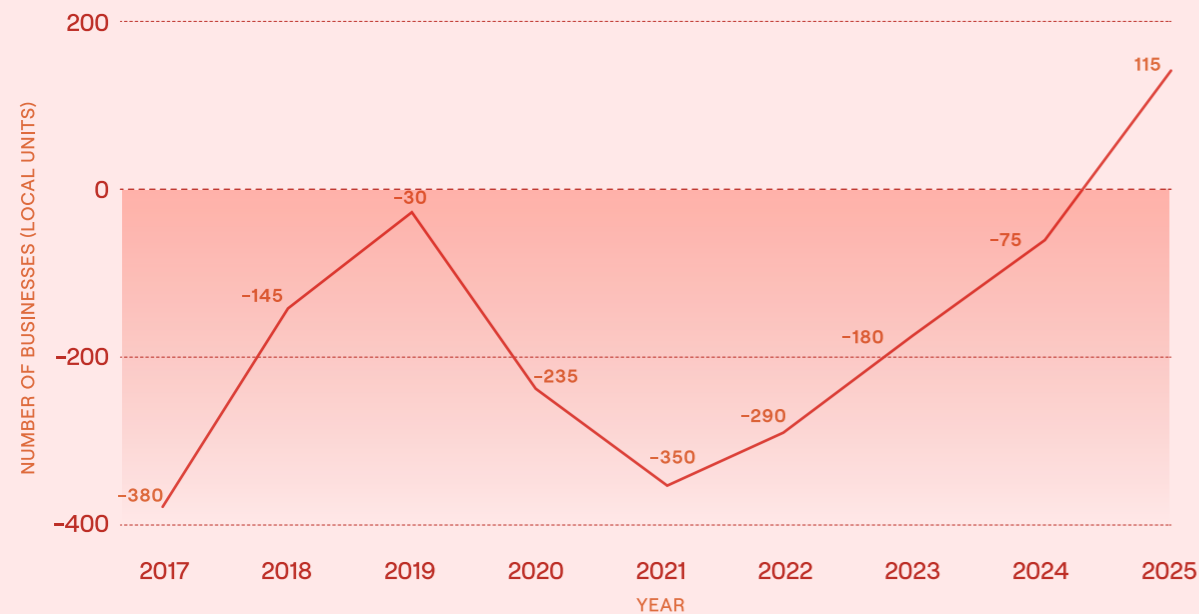
Business Births and Deaths | 2017 – 2025

SOURCE: ONS 2026



Net Businesses Gained or Lost | 2017 – 2025

SOURCE: ONS 2026



Business Demography

Business demography data for Warrington presents recent improvements in business counts in the borough, following a prolonged period in which closures exceeded business formation. In 2025, business births (1,080) exceeded business deaths (965) in Warrington for the first time in over a decade.

Significant wider economic uncertainty over the last decade, including Brexit, the pandemic, energy price increases and constrained public sector budgets have impacted business growth, as illustrated in the graph, with consistently higher business deaths than business births.

Closures declined from 1,400 in 2022 to 1,080 in 2024 and further to 965 in 2025

However, since 2022, significant stabilisation has been evident. Closures declined from 1,400 in 2022 to 1,080 in 2024 and further to 965 in 2025, the lowest level recorded across the period. Over the same timeframe, business formation remained relatively stable. As business creation remained static and closure rates fell sharply, the cumulative effect was a return to positive net change in 2025, with Warrington recording a net gain of 115 local business units.

The emerging improvement in business demography aligns with Warrington's wider economic performance, which in 2025 was characterised by strong employment growth, a tight labour market and a high concentration of private sector activity, particularly in knowledge intensive sectors. With this economic context, the return to net business growth reflects improving business resilience and confidence in Warrington's economy following the economic shock of the pandemic

Sectoral Business Growth

A clear structural shift in the local economy has been evident. In 2025, Warrington had the seventh highest concentration of 'new economy' firms (NEFs) out of all UK cities. (NEFs are firms in emerging knowledge intensive sectors at the forefront of new technologies and innovations). Paralleling this, Warrington doubled its knowledge intensive business services (KIBS) jobs between 2015 and 2024, the strongest growth of any UK city (Centre for Cities, 2026).

This expansion of these knowledge-based sectors requires a highly educated workforce. However, Warrington ranked 1st nationally for the highest proportion of residents with no formal qualifications (13.6% in 2024). Continued investment in education and skills development will therefore be essential to ensure local residents can participate in the town's economic growth and benefit from the opportunities created by its evolving economy.

The Government's Modern Industrial Strategy identified eight key priority industrial sectors to support accelerated growth, the so-called IS8. Out of the IS8 sectors, the share of new economy firms in Warrington was dominated by 'professional business' firms. (Centre for Cities, 2026). In 2025, Professional, scientific and technical services remained the largest sector in the Borough with 1,970 local business units or a 19.1% share of the economy.

Looking at industrial based sectors, Construction increased by 75 businesses (7.2% increase) with the share of the business base sat at 10.9% in 2025, the second largest sector.

Accommodation and food services saw the largest increase in businesses from 2019 to 2025. This retail and leisure based sector saw a 24.7% rise of 120 additional local units, reflecting the resilience of Warrington's service sector and investment into a thriving destination.

Visitor economy

Most recent STEAM data (2024) reports visitor days in Warrington grew from 9.66 million to 10.4 million in 2024. The visitor economy employed 6,554 people and reached a value of around £718 million, up by 12% on the previous year.

Investment

Industrial transactions led the way across Warrington’s investment market in 2025

10 of the 15 deals reported were from the industrial sector, but also with some significant transactions involving offices and the healthcare sector. In total, around £151 million for property was transacted in the Borough across 15 deals.

The activity reflects some of the reports coming from national commentators. CBRE reports annually on the UK investment market, highlighting that 2025 saw an uplift in performance with the healthcare, living, office and industrial sectors all featuring. Overall they reported an 11% improvement on the previous year with £62.8bn transacted, of which £12.0bn came from the healthcare market and £9.78bn from the industrial sector. Overseas investment helped this strengthening of the market with U.S. and other international funds buying into a range of sectors.

Warrington proved to be a target for some of these funds. Global investor Blackstone, headquartered in the U.S. bought three industrial properties from Warehouse Real Estate Investment Trust (REIT) totalling £19.4 million, picking up Gawsorth Court in Birchwood with a mix of tenants, 1 Kingsland Grange at Woolston, occupied by Life Technologies, and builders merchants Selco in the town centre. This was part of a much larger portfolio sale of 64 properties, one of several portfolio deals seen last year.

UK based investor, London Metric Properties bought 128 properties across the country and tenants

included The Range store on Winwick Road and Mark Thompson Transport on Grappenhall Lane.

The largest industrial deals saw Canmoor buy Warrington 379 at Dallam Lane for just under £40 million, occupied by warehouse specialist Kammac, and another UK fund manager Orchard Street picked up the 12,500 sq m Taurus development at Gemini paying £23.65 million with a yield of 4.9%.

Away from industrial, one of the largest transactions was in the healthcare sector, with the Spire hospital at Stretton, being sold as part of a huge transfer of assets from medical investor Assura to Prime Health Properties. What started off in early 2025 as a disposal programme to reduce debt, evolved to a full sale involving over 600 properties. The 4,000 sq m hospital was included at a value of £28.5 million.

The office investment market was quiet. Phoenix House at Lakeside, Centre Park was sold for £2.9 million, a significant reduction from the last sale reported in 2017 when at the time LCP achieved £4.9 million. The yield this time around was 9.5% from an income of £295,000 and a mix of tenants.

The only other significant office sale saw Hilden House on Sankey Street sell for £3.3 million. The former government office for DWP totals 4,900 sq m and was bought by Caro Group. The company is converting the building into 100 residential units.

Warrington Investment Deals | 2025

SOURCE: OBI, 2026

PROPERTY TYPE	NUMBER OF TRANSACTIONS	TOTAL FLOORSPACE TRANSACTED (SQ M)	INVESTMENT SPEND (£)
Office	3	7,864	6.475
Industrial	10	101,193	110.6
Other	2	4,007	28.5

PROPERTY	VENDOR	PURCHASER	SIZE (SQ M)	TENANT(S)	INCOME (£/PA)	NET INITIAL YIELD (%)	AGENT(S)
OFFICE							
Phoenix House, Centre Park	Private Landlord	Private Investor	2,725	CHEC, Ofcom, JB Associates	294,215	9.53	ADS RE / Knight Frank
Hilden House, Sankey Street	Elite Gemstone Properties	Caro Group	4,900	Vacant	N/A	N/A	JLL
20 Bold Street	Regent Street Investments	Bold Street Investments	221	Vacant	N/A	N/A	Morgan Williams
INDUSTRIAL							
Warrington 379, Dallam Lane	Hines	Canmoor AM, Greykite	35,220	Kammac	Portfolio sale of 5 properties.		ACRE Capital / SBY Real Estate
Taurus Park, Gemini	Marchmont IM	Orchard Street IM	12,529	Various	Undisclosed	4.90	ACRE Capital / Osborne Clarke
The Acres, Grappenhall Lane	Urban Logistics REIT	LondonMetric Properties	10,299	Mark Thompson Transport	Portfolio sale of 128 properties.		Source: RCA Real Estate Analytics
The Range, Winwick Road	Urban Logistics REIT	LondonMetric Properties	5,072	The Range			
1 Milner Street	Warehouse REIT	Blackstone	3,902	Selco			
1 Kingsland Grange, Woolston	Warehouse REIT	Blackstone	6,596	Life Technologies	Portfolio sale of 64 properties.		Source: RCA Real Estate Analytics
Gawsorth Court, Risley	Warehouse REIT	Blackstone	8,802	Various			
Barleycastle Industrial Estate, Appleton	Tandem Investment	Mileway	3,809	Shred-It, Evander Living	384,900	6.33	PK3 / B8 Real Estate
QAS Building, Calver Road, Winwick	Staffordshire CC Pension Fund	Northtree IM	3,490	QAS Group	Undisclosed	Undisclosed	B8 Real Estate / Colliers
Unit 4-11, Chesford Grange, Woolston	Nuveen Real Estate	Columbia Threadneedle	11,474	Various	Portfolio sale of 16 properties.		Source: RCA Real Estate Analytics
OTHER							
Cheshire Hospital, Stretton	Assura Group	Primary Health Properties	3,973	Spire Cheshire	Portfolio sale of 608 properties. Source: RCA Real Estate Analytics		
33 Buttermarket Street	Private Landlord	Private Investor	34	Dejavoo Barbers	Undisclosed	Undisclosed	Source: Atlas

500,000 SQ.FT.

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Office

Warrington continues to provide a key office market for the North West

Occupiers are attracted to the borough's position between Manchester and Liverpool and availability of some of the highest quality, refurbished office space in the region. The following analysis focusses on the key office market deals above 200 sq m, though also provides insights into the sub- 200 sq m market, which in recent years has shaped office leasing in Warrington.

Larger office activity (200 sq m and above), for both leasehold and freehold transactions, totalled 15,802 sq m across 28 deals. This was broadly in line with last year's deal volume (26 deals). The number of office deals above 2,000 sq m was again lower than the long-term average. However, total floorspace increased by 23%, reflecting a slightly larger average deal size. Rents for units 200 sqm and above averaged £187.69/sq m (£17.44/sq ft).

The volume of larger office activity in Warrington was almost entirely concentrated within the leasehold market, with only three transactions, or 11%, attributed to freehold sales. However, freehold take-up was more substantial with 3,473 sq m of floorspace equating to 22%, in line with the long-term average of 20%. Two of the three freehold sales were sized above 1,000 sqm, accounting for two of only four offices above this threshold transacted during the year. These included 1,708 sq m south of Spencer House at Birchwood Park, acquired by POD Properties and a 1,115 sq m unit at International Business Centre in Gemini taken by European Metal Recycling for £1,119.46/sq m.

Looking at the leasehold market, which consistently accounts for the majority of deals, 12,329 sq m of leasehold space was transacted across 25 deals in 2025. The average office unit size for leases remained unchanged from 2024 at 493 sq m. Average lease length decreased marginally to 6.1 years, with just over half of leases agreed on five-year terms. As expected, the seven deals agreed on 10-year leases

were also the seven largest leasehold deals of the year, each above 500 sq m. Occupiers committing to these larger spaces are typically establishing a longer-term operational presence, where extended lease terms help justify the investment required for fit-out and relocation. The average rent for units above 500 sq m was £209/sq m (19.41/sq ft), which was higher than overall average rent, as these units were mostly A-grade refurbished and serviced office space.

Rental levels continued to strengthen as the year's highest rent for units above 500 sqm increased to £279.86/sq m (£26/sq ft). This was achieved on a 10-year lease taken by the civil and electrical engineering firm Opus Group for the 700 sq m unit at 2 Trinity, Birchwood, the fourth largest leasehold office deal of the year. The firm's relocation from Culcheth to the fully fitted suite at Trinity illustrates a shift in occupier preference, with firms taking space at the top end of the market increasingly seeking ready-to-occupy offices that minimise upfront fit-out costs and allow for rapid and efficient relocation.

When assessing spatial attractiveness, the quantum of space above 200 sq m within wards mirrored that of last year's split. Yet again, Birchwood had a stellar year, being responsible for the largest number of transaction volume and floorspace. 18 deals equating to 11,182 sq m, or 70% of take up, occurred at Birchwood. Seven of the ten largest deals were situated here, ranging from 570 sq m to 2,240 sq m, all secured on 10-year leases.

Birchwood represents the largest out-of-town office location in the North West, accommodating over 165 businesses and over 6,000 employees. Here, the four largest office deals of the year were recorded at Allday House, Spencer House, Chadwick House and 2 Trinity. Birchwood continues to attract occupiers due to its strategic location between the M6 and M62 corridors, high quality campus environment and ongoing investment in workspace and amenities.

Rent for units across Birchwood averaged £192.66/sq m (£17.90/sq ft) which largely makes up the overall average stated above.

Centre Park maintained its office market activity with three deals throughout the year. Units leased ranged from around 300 sq m to 950 sq m with an average rent of £208.10/sq m (£19.33/sq ft). The most notable name to take space at Centre Park in 2025 was Ofcom, which agreed a 10-year lease on the first floor of 340 Firecrest Court, a 571 sq m office unit, at a rent of £247.57/sqm (£23/sq ft). The high rent achieved solidifies the continued appeal of the park's close proximity to the town centre.

Over at Gemini/Winick Quay, another cluster of deals occurred. Here, there were four deals equating to 2,093 sq m of floorspace. Two of these were for suites at Europa Boulevard. Both suites were let from Hurstwood Holdings for £129.17 (£12/sq ft) on 5 year leases to Avoe Ltd and Ziegler UK, taking 307 sq m and 305 sq m respectively. These rents sit below other areas of the town, reflecting the nature of the office stock within this location, which generally comprises older, secondary accommodation positioned towards the more affordable end of the Warrington office market.

Warrington Office Deals (Above 200 Sq M) by Area | 2025

SOURCE: OBI, 2026

AREA	NUMBER OF TRANSACTIONS	TOTAL FLOORSPACE TRANSACTED (SQ M)
Birchwood	18	11,182
Centre Park	3	1,825
Bewsey	1	200
Gemini / Winwick Quay	4	2,093
Stockton Heath	1	200
Wildespool Causeway	1	302
TOTAL	28	15,802



CHADWICK HOUSE | BIRCHWOOD PARK

Small offices

Offices under 200 sq m are now the norm for volume make up of transactions in Warrington. 47 of these small office transactions were recorded through 2025, totalling a modest 3,480 sqm of floorspace. While insubstantial in floorspace contribution, the number of deals recorded of this size were 68% higher than those above 200 sq m. This highlights the small office market as the main contributor to the volume of office deals in Warrington and was again where occupier demand was centered.

10 of 15 deals recorded in the town centre were leases from RAM Properties between 45-110 sq m

This dominance of small office deals has now become the expected narrative for Warrington's office market. The spread of these deals was also much more balanced, with the town centre rivalling Birchwood in small office deal volumes and each recording almost the same floorspace total of around 1,150 sqm. As the town centre recorded 15 deals compared to 19 across Birchwood, the same floorspace total recorded reflects slightly larger units transacted in the town centre. 10 of 15 deals recorded in the town centre were leases from RAM Properties between 45-110 sq m, all achieved at £150.70/sq m (£14/sq ft) on three year lease terms. The rental for these units whilst not hitting the prime levels seen elsewhere, still reflect a strong town centre market level.

At Birchwood, nine out of the 19 small office deals were for units at Chadwick House. This refurbished office building at the centre of Birchwood Park recorded the largest volume small office deals of any office space, with Warrington Borough Council (WBC) leasing units as small as 24 sqm. Rents for units below 200 sqm at Chadwick house averaged £403.54/sq m (£37.49/sq m) with almost all deals on one year lease terms. An even stronger rent was achieved elsewhere in Birchwood Park at 401 Faraday Street, where WBC let the 110 sq m unit to Veolia Nuclear Solutions UK for a rent of £484.38/sq m (£45/sq ft) on a one-year lease.

Out of the 42 disclosed lease terms for small offices, half were one-year leases. 16 of these 21 one-year lease deals were for units sized 50 sq m and below. There is a clear and prominent appetite for very small and flexible space and this contributes significantly to office deal volumes.

At Wilderspool Causeway, a notable refurbishment scheme was completed with the former St James Business Centre being renamed the Causeway. The building has undergone a multi million pound transformation through a joint venture between WBC and Langtree. As part of the repositioning of the scheme, the refurbished space secured three new occupiers, including games developer 10:10 Games, web design company Prism Studios and in 2025 introduced the technology specialist Oolio, collectively taking over 500 sq m of office space. The redevelopment has introduced enhanced co-working areas, flexible meeting rooms and event space, reflecting the continued shift towards more adaptable and collaborative workspace environment within Warrington's office market.

Warrington Office Deals (Sub 200 Sq M) by Area | 2025

SOURCE: OBI, 2026

AREA	NUMBER OF TRANSACTIONS	TOTAL FLOORSPACE TRANSACTED (SQ M)
Birchwood	19	1,147
Gemini / Winwick Quay	7	718
Latchford	1	55
Orford	2	156
Town Centre	15	1,157
Wildespool Causeway	3	247
TOTAL	47	3,480

Warrington Office Deals (Above 200 Sq M)

PROPERTY	LANDLORD / VENDOR	TENANT / PURCHASER	SIZE (SQ M)	RENT / PRICE (SQ M)	LEASE TERM (YEARS)	AGENT(S)
Ground Floor, Allday House, Birchwood	Pin Properties	21D Clinical	2,240	£177.61	10 years	JLL / Cushman & Wakefield
Spencer House, Birchwood	Evolve	POD Properties	1,708	Undisclosed	Freehold	OBI
Third Floor, Chadwick House, Birchwood Park	Warrington Borough Council	Culina Logistics	1,568	188.3.7	10 years	OBI / JLL
International Business Centre, Gemini	Warrington 2000+	European Metal Recycling	1,115	£1,119.46	Freehold	Warrington Borough Council
9 Lakeside Drive, Centre Park	Palladium Group	PAM Group	961	£177.61	10 years	OBI / Canning O'Neill
Ground & First Floor, 2 Trinity, Birchwood	Tandem Investments	Opus Group	699	£279.86	10 years	OBI / Cushman & Wakefield
Xpedia, Birchwood	Warrington 2000+	MRS Training & Rescue	650	£838.09	Freehold	Taylor Weaver
Second Floor, The Point, Birchwood	Orbit Developments	Balfour Beatty	649	£182.99	10 years	OBI / Canning O'Neill
Fifth Floor 401 Faraday Street, Birchwood Park	Warrington Borough Council	Synextra	627	£188.37	10 years	OBI / JLL
First Floor, 340 Firecrest Court, Centre Park	C4 Projects	Ofcom	571	£247.57	10 years	OBI / Carter Jonas
Second Floor, 2 Cinnamon Park, Birchwood	Orbit Developments	PNZ Group	459	£176.21	5 years	OBI / JLL
First Floor, Allday House, Birchwood	Pin Properties	Sunbelt Rentals	410	£195.64	5 years	JLL / Cushman & Wakefield
Suite 2, 310 Europa Boulevard, Gemini	Hurstwood Holdings	Avove Ltd	370	£129.17	5 years	OBI / Savills
602 Birchwood One, Birchwood	Seddon Developments	21D Clinical	310	£177.61	3 years	OBI
Suite 3, 310 Europa Boulevard, Gemini	Hurstwood Holdings	Ziegler UK	305	£129.17	5 years	OBI / Savills

Ground Floor, Unit 6, Quay Business Centre, Winick Quay	Bauer Group	OCU Group	303	£166.84	3 years	OBI / Roberts Vain Wilshaw
First Floor, 16 The Causeway, Wilderspool Causeway	Langtree	1010 Games	302	£156.08	5 years	OBI
Ground Floor, Unit A, The Beacons, Birchwood	Orbit Developments	Stothers	295	£160.92	3 years	OBI
340 Firecrest Court, Centre Park	C4 Projects	BGEN	293	£199.13	5 years	OBI
Ground Floor, 1 The Square, Birchwood	Orbit Developments	Alderley Partnerships	255	£166.84	5 years	OBI / Savills
Ground Floor, Unit A, The Beacons, Birchwood	Orbit Developments	Quinn Civils	251	£180.30	5 years	OBI
Suite D, Chadwick House, Birchwood Park	Orbit Developments	Blue Ribbon Health	226	£156.08	5 years	OBI / JLL
First Floor, 2 Trinity, Birchwood	Tandem Investments	AMB Recruitment	226	£236.81	5 years	OBI / Cushman & Wakefield
Unit 633/635, Birchwood Boulevard, Birchwood	Frankelbrow	Active Dental Cheshire	209	£172.22	5 years	OBI / Knight Frank
Ground Floor, The Engine Rooms, Birchwood Park	Warrington Borough Council	Barchester Helathcare Homes	200	£271.58	5 years	OBI / JLL
Dallam Court, Dallam Lane	RAM Properties	SSS Telecom	200	£150.70	3 years	RAM Properties
First Floor, 4 The Square, Birchwood	Orbit Developments	Opteven UK	200	£166.84	5 years	OBI / Savills
7a London Road, Stockton Heath	Langtree	KOK Surveyors	200	£258.34	5 years	OBI

Warrington Office Deals (Sub 200 Sq M)

PROPERTY	VENDOR / LANDLORD	TENANT / PURCHASER	SIZE (SQ M)	RENT / PRICE (SQ M)	LEASE TERM (YEARS)	AGENT(S)
47a Sankey Street	Private Landlord	Nichola Kenneally	161	£92.89	Undisclosed	Read Properties
Suite 416a & 416b, Chadwick House, Birchwood Park	Warrington Borough Council	GTC Infrastructure	158	£409.03	1 year	OBI / JLL
Ground Floor, The Old Rectory, Winwick	ATM Landmark	The Physio Lounge	150	£193.75	5 years	OBI
Suite 1, 310 Europa Boulevard, Gemini	Hurstwood	Evoqua Water Technologies	140	£172.22	5 years	OBI / Savills
Unit 1, Empire Court, Orford	Private Landlord	Caring Connections	139	£93.00	Undisclosed	Read Properties
11 Palmyra Square	Private Landlord	Top Hampers	133	£127.55	3 years	Morgan Williams
First Floor, 17a The Causeway, Wilderspool Causeway	Langtree	Oolio Group	133	£147.47	3 years	OBI
Unit 10, Quay Business Centre, Winwick	Bauer	People Asset Management	130	£161.46	5 years	OBI / Roberts Vain Wilshaw
Unit 11, Quay Business Centre, Winwick	Bauer	People Asset Management	130	£161.46	3 years	OBI
Ground Floor, 4 The Square, Birchwood	Orbit	Brown & Brown Insurance	199	£166.84	5 years	OBI
RAM Properties, town centre	RAM Properties	Undisclosed	111	£150.70	3 years	RAM Properties
401 Faraday Street, Birchwood Park	Warrington Borough Council	Veolia Nuclear Solutions UK	110	£484.38	1 year	OBI / JLL
Part Ground, 3 The Square, Birchwood Boulevard, Birchwood	Orbit	Warden Construction	104	£166.84	3 years	OBI / Savills
4B Bold Street, Town Centre	Private Landlord	Private Investor	99	£2,922.43	Long Leasehold	Morgan Williams
Suite 005 Lovell House, Birchwood Park	Warrington Borough Council	Envirotest Water	98	£236.81	1 year	OBI / JLL
RAM Properties, town centre	RAM Properties	Undisclosed	93	£150.70	3 years	RAM Properties
RAM Properties, town centre	RAM Properties	Undisclosed	93	£150.70	3 years	RAM Properties
RAM Properties, town centre	RAM Properties	Undisclosed	93	£150.70	3 years	RAM Properties
Suite S5 310 Europa Boulevard, Gemini	Hurstwood	Unique Risk Management	89	£193.75	3 years	OBI / Savills
GF East, 401 Faraday Street, Birchwood Park	Warrington Borough Council	Warrington Domiciliary Specsavers	86	£387.50	1 year	OBI / JLL
Suite C Unit 5 Palatine Ind Est, Wilderspool Causeway	Private Investor	Undisclosed	77	£65.77	Undisclosed	Read Properties

RAM Properties, town centre	RAM Properties	Undisclosed	70	£150.70	3 years	RAM Properties
Suite G08 Chadwick House, Birchwood Park	Warrington Borough Council	OBI	59	£389.33	3 years	OBI / JLL
RAM Properties, town centre	RAM Properties	Undisclosed	56	£150.70	3 years	RAM Properties
RAM Properties, town centre	RAM Properties	Undisclosed	56	£15.70	3 years	RAM Properties
Regan House, Latchford	Private Investor	Undisclosed	55	£358.12	1 year	Read Properties
Suite 512 Chadwick House, Birchwood Park	Warrington Borough Council	Mediaspace Diagnostics	50	£320.12	1 year	OBI / JLL
Suite 410b Chadwick House, Birchwood Park	Warrington Borough Council	GTC Infrastructure	49	£457.47	1 year	OBI / JLL
First Floor, 10 Rylands Street	Private Investor	Undisclosed	47	£110.76	Undisclosed	Read Properties
RAM Properties, town centre	RAM Properties	Undisclosed	46	£150.70	3 years	RAM Properties
RAM Properties, town centre	RAM Properties	Undisclosed	46	£150.70	3 years	RAM Properties
Suite S6 310 Europa Boulevard, Gemini	Hurstwood	Evoqua Water Technologies	44	£172.22	5 years	OBI / Savills
Suite 420 Chadwick House, Birchwood Park	Warrington Borough Council	Trinovant	39	£365.98	1 year	OBI / JLL
Suite 412 Chadwick House, Birchwood Park	Warrington Borough Council	Extra MSA Warrington	38	£457.47	1 year	OBI / JLL
Office C, Unit 5 Palatine Ind Est	Private Investor	Undisclosed	37	£113.02	1 year	Read Properties
1 Quay Business Centre, Winwick	Bauer	Intelliweb	35	£199.13	1 year	OBI / Roberts Vain Wilshaw
RAM Properties, town centre	RAM Properties	Undisclosed	33	£150.70	3 years	RAM Properties
Suite 507 Chadwick House, Birchwood Park	Warrington Borough Council	BE Group	32	£387.50	1 year	OBI / JLL
Suite 415b Chadwick House, Birchwood Park	Warrington Borough Council	Full Circle Workplace	28	£457.47	1 year	OBI / JLL
Suite 112 Newton House, Birchwood Park	Warrington Borough Council	Labdesk	25	£290.63	1 year	OBI / JLL
Suite 407 Chadwick House, Birchwood Park	Warrington Borough Council	Mikaway.com	24	£387.50	1 year	OBI / JLL
Suite 2A The Outset, Sankey Street	Equinox Property	JR Levins LLP	20	£376.74	1 year	OBI / Roberts Vain Wilshaw
Suite 119 The Hub, Jubilee Way, Orford	Warrington Borough Council	Undisclosed	17	£293.10	1 year	Read Properties
Suite 002 Newton House, Birchwood Park	Warrington Borough Council	Zion Care Group Limited	14	£258.34	1 year	OBI / JLL
Suite 116, Lovell House, Birchwood Park	Warrington Borough Council	Damens General Trading	14	£291.17	1 year	OBI / JLL
Suite 008, Lovell House, Birchwood Park	Warrington Borough Council	FMS Interiors	10	£285.25	1 year	OBI / JLL
Suite 008 Lovell House, Birchwood Park	Warrington Borough Council	Femini Print	10	£302.36	1 year	OBI / JLL

Industrial

The manufacturing sector led take up across the North West, with Warrington playing a key role in this trend.

A total of 2.64 million sq m (or around 28.4 million sq ft) take-up has been reported in the Warrington Annual Property Review since 1999.

Across Warrington, industrial take up totalled just over 67,500 sqm across 39 transactions in 2025 (deals over 200 sq m). This fell somewhat short of the previous year by six deals and 11,000 sqm, representing a 14% decrease in floorspace transacted. However, the reduction in overall floorspace is largely attributable to the absence of multiple large-scale transactions, reflecting a shortage of space rather than any weakening of underlying occupier demand.

Across the year, just two 'big box' deals sized above 50,000 sq ft (4,640 sq m) were recorded. By far the largest and most significant was the 39,135 sq m letting of Indurent 420 at Omega West. This Grade A speculative unit was taken by Regency Glass on a 15-year lease at £110.33/ sq m (10.25/ sq ft), marking the largest single-site lease in the North West during 2025 and the biggest manufacturing transaction across the UK in Q3 2025. The scheme was developed by Indurent and achieved BREEAM 'Excellent' certification. Regency Glass's relocation into a purpose-built facility highlights broader occupier preference for high specification, sustainable units.

Therefore, it is unsurprising that the manufacturing sector led take up across the North West, with Warrington playing a key role in this trend. The 39,135 sq m Omega West deal alone significantly boosted the total for the sector, with DTRE reporting that the volume of space signed to manufactures increased by 24% year on year across the region (DTRE, 2025).

Looking at the smaller end of the market, strength in occupier demand was reflected by the continued upward pressures on rent. Almost 75% of all industrial deals recorded this year were sized below 1,000 sqm. Within this range, the average rent sat at £127.57/sq m (£11.85/sq ft). This represents a notable increase

from the £107.84/sq m (£10.02/sq ft) average recorded the previous year. Average rent for all deals stood slightly lower at £120/ sq m (£11.15/ sq ft).

Prime rents for units below 1,000 sq m were, for the third year in a row, achieved at Gemini 8, with Northwood Urban Logistics letting a total of 1,939 sq m across three transactions where rents of £153.93/sq m (£14.30/sq ft) were achieved. This marks a further increase on the £139.93/sq m (£13/sq ft) achieved across three comparable transactions at Gemini 8 last year. The long term pattern in rising rents for smaller units signals a clear and continued strength of demand for modern, small industrial space.

This rental growth reflects wider trends across the North West industrial market, Research from DTRE highlights that rental levels across the region continued to rise throughout 2025 as 'each new deal has seemed to set a fresh benchmark, underscoring both scarcity of quality space and enduring appetite from occupiers seeking quality, well-located assets.' (DTRE, 2025).

Although the proportion of deals below 1,000 sq m increased by a further 11% compared with the previous year, the average deal size remained virtually unchanged, standing at 1,732 sqm compared to 1,747 sq m in 2024. However, the Indurent 420 deal heavily influenced the figure, excluding it drops the average to just 747 sqm.

Considering deal sizes were mostly on the smaller side, lease lengths accordingly sat at 10 years or below, with the exception of the 15-year lease agreed for Indurent 420. Five-year leases were once again the most common and, as with 2024, the average lease length was just under seven years. In the past, shorter lease structures were relatively uncommon for industrial units in Warrington. Over the past few years however, shorter leases have become increasingly evident, with six transactions agreed on



GEMINI 8

three-year terms during the 12 months. The recent presence of short term lease structures points to a degree of economic caution among occupiers. Equally, within the smaller unit market it can reflect businesses retaining flexibility to accommodate future growth, relocation or operational changes as space requirements evolve.

Woolston was responsible for the highest volume of transactions in Warrington in 2025, with 14 deals recorded compared to eight in the previous year. Excluding the Omega West transaction, Woolston again accounted for the most floorspace transacted, around 30%. Rents averaged £120/sq m (£11.15/sq ft), in line with the overall figure. Activity was largely spread across Westway 21 at Chesford Grange, Melford Court at Hardwick Grange and Tatton Court at Kingsland Grange. Westway 21 in particular saw two

notable transactions sized 1,328 sqm and 1,813 sqm, both agreed at rents of £118.40/sq m (£11/sq ft). The Estate was fully let by B8RE within 12 months of their appointment, demonstrating strong occupier demand for modern industrial space within this location.

Along with setting the new prime rent, Gemini/Winwick Way maintained a positive share of industrial market activity, recording nine deals totalling 5,578 sq m. Deals were primarily split between Gemini 8 and Europa Trade Park. Average rents within these two business parks achieved a comparatively high level of £138.16/sq m (£12.84/sq m). Gemini 8 reached 75% occupancy in November following its largest letting of the year, a 1,538 sq m shed taken by Caterite Food and Wine Services at £153.93/sq m (£14.30/sq ft) prime rent on a five year lease.

Warrington Industrial Deals by Area | 2025

SOURCE: OBI, 2026

AREA	NUMBER OF TRANSACTIONS	TOTAL FLOORSPACE TRANSACTED (SQ M)
Bewest / Dallam	7	7,498
Birchwood / Risley	7	6,478
Gemini / Winwick Quay	9	5,578
Lymm	1	367
Omega	1	39,135
Woolston	14	8,473
TOTAL	39	67,529

Warrington Industrial Deals

PROPERTY	VENDOR / LANDLORD	TENANT / PURCHASER	SIZE (SQ M)	RENT / PRICE (SQ M)	LEASE TERM (YEARS)	AGENT(S)
Indurent 420, Omega West	Indurent	Regency Glass	39,135	110.33	15 years	B8 Real Estate / DTRE / CCP
Dallam 1, Folly Lane	Morbaine	Private	4,805	34.98	0.5 years	JLL
Unit 5-7, Clayton Road, Risley	Mileway	Thinventory	3,198	86.11	10 years	B8 Real Estate
Unit 3, Westway 21, Chesford Grange, Woolston	Kennedy Wild	Stuart Canvas	1,813	118.40	5 years	B8 Real Estate
Unit 510, Birchwood Boulevard, Birchwood	Frankelbrow	FMS Interior Services	1,653	102.26	10 years	OBI
Unit 9, Gemini8 Business Park, Gemini	Northwood Urban Logistics		1,538	139.93	5 years	Newmark / B8 Real Estate
Unit 7, Westway 21, Chesford Grange, Woolston	Kennedy Wild	Dinex Exhausts	1,328	118.40	10 years	B8 Real Estate
Owen Street	Edge Fold Estates	Aldridge Foundation	1,130	117.33	10 years	B8 Real Estate
Unit 1c, New Cut Lane, Woolston	Private Landlord	Howden Joinery Properties	1,081	47.36	10 years	B8 Real Estate
Unit 3/4, Gemini8 Business Park, Gemini	Northwood Urban Logistics	Global Freight Solutions	975	153.93	10 years	Newmark / B8 Real Estate
Unit 6a, Westway 21, Chesford Grange, Woolston	Kennedy Wild	Victoria House (Sales) UK	764	118.40	10 years	B8 Real Estate
Unit 5, Easter Court, Gemini	Picton	Armoduct	712	123.79	5 years	Roberts Vain Wilshaw / CBRE
Unit 14, Tatton Court, Kingsland Grange, Woolston	Private Landlord	CPC Pension Scheme / Winners Propco	604	Undisclosed	Freehold	B8 Real Estate
Unit 4b, Eagle Park, Dallam	Mileway	Belfor UK	592	134.55	10 years	B8 Real Estate
Unit 5, Gemini8 Business Park, Gemini	Northwood Urban Logistics	Telefonica UK	554	153.93	5 years	Newmark / B8 Real Estate
Unit 15, Colville Court, Winwick Quay	Coal Pension Properties	Hudson Lifting	535	139.93	10 years	JLL
Unit C3, Trident Business Park, Birchwood	Indurent	Fan Doggy Dozy	514	110.33	5 years	OBI / B8 Real Estate
Unit D2, Trident Business Park, Birchwood	Indurent	SA Joinery	444	107.64	5 years	OBI / B8 Real Estate
Unit 49, Melford Court, Hardwick Grange, Woolston	Multi Industrial Galaxy	PCT Performance Chemicals	438	150.70	10 years	JLL
Unit 33, Melford Court, Hardwick Grange, Woolston	BGO	AST Signs	430	139.93	5 years	B8 Real Estate
Unit 15, Gemini8 Business Park, Gemini	Northwood Urban Logistics	Occastore	410	153.93	5 years	Newmark / B8 Real Estate

Unit 1, Marnshaw Industrial Estate, Lymm	Private Landlord	Omnisolar	367	Undisclosed	5 years	Roger Hannah & Co
Unit 10, Rufford Court, Woolston	Peter Stevens Estates	Some More	344	107.64	3 years	B8 Real Estate
Unit 223, Europa Trade Park, Europa Boulevard, Gemini	Mileway	Firecracker Projects	344	126.48	5 years	B8 Real Estate
Unit 46, Melford Court, Hardwick Grange, Woolston	4th Industrial Properties	Private Individual	325	150.70	10 years	Savills / B8 Real Estate
Unit 43, Melford Court, Hardwick Grange, Woolston	4th Industrial Properties	Oil Quick	321	141.55	5 years	Knight Frank / B8 Real Estate
Unit 241, Europa Trade Park, Europa Boulevard, Gemini	Mileway	M Group NW	294	127.55	5 years	B8 Real Estate
Unit 41, Melford Court, Hardwick Grange, Woolston	4th Industrial Properties	Pascomm Solutions	285	137.24	5 years	Knight Frank / B8 Real Estate
Unit 17, Cranford Court, Woolston	Private Landlord	Projuice Holdings	276		Freehold	B8 Real Estate
Unit 8, Gateway 49 Trade Park	Network Space	Crown Paints	275	150.70	10 years	B8 Real Estate
115 Hoyle Street, Bewsey	Morbaine	Aichinson Logistics	232	91.49	3 years	Roberts Vain Wilshaw
105 Hoyle Street, Bewsey	Morbaine	Tyler International	232	91.49	3 years	Roberts Vain Wilshaw
107 Hoyle Street, Bewsey	Morbaine	Kaltire	232	91.49	3 years	Roberts Vain Wilshaw
Unit 29, Tatton Court, Kingsland Grange, Woolston	Private Landlord	North West Auto Commercials	232	107.64	5 years	B8 Real Estate
Unit D1, Taylor Business Park, Risley	Ribston	NEO Transport	232	131.32	3 years	B8 Real Estate
Unit D6, Taylor Business Park, Risley	Ribston	Champion Products Europe Unlimited	232	131.32	5 years	B8 Real Estate
Unit 27, Tatton Court, Kingsland Grange, Woolston	Private Landlord	Liquid Technology	232	107.64	5 years	B8 Real Estate
Unit 33, Craven Court, Winwick Quay	Bizspace	YNZ Services	216	124.00	3 years	LM6
Unit B1, Trident Business Park, Birchwood	Indurent	Luella Projects	205	139.07	5 years	OBI / B8 Real Estate
Unit 8b, Trident Business Park, Birchwood	Indurent	BTY Boxing	177	68.35	5 years	OBI / B8 Real Estate

Industrial Developments

One of the most notable completions during the monitoring period was Omega Zone 8, a large scale industrial development forming part of the wider Omega employment area. Although the site is within St Helens Borough, it has been agreed that 31.2 hectares of the development will contribute towards Warrington's employment land supply due to its functional relationship with the wider Omega logistics hub. The scheme has now completed and represents the largest B8 employment floorspace delivery during the 2024/25 monitoring period, reinforcing the role of the Omega corridor as one of the North West's most significant logistics locations.

Elsewhere, planning permission was granted for a new warehouse facility for Sortimo at Appleton Thorn, on the site of the former inland border facility and coach depot. The proposed development will comprise 5,940 sq m of industrial floorspace

alongside 849 sq m of ancillary office space. This will ensure the continued availability of supply for industrial and logistics operators around the M56 motorway interchange.

Outline approval was also granted for the redevelopment of the former Cadent gas works site on Lingley Mere Business Park. The scheme will deliver approximately 9,300 sq m (100,000 sq ft) of new industrial and logistics space, representing the regeneration of a previously underutilised brownfield employment site. Network Space developments are committed to utilising the space to provide for market demand whilst prioritising sustainability.



TAURUS PARK

Retail & Leisure

The town continues to accommodate a substantial quantum of retail floorspace across the town centre.

Research published by Knight Frank suggests that the UK retail sector began to stabilise in 2025 following several years of disruption driven by the pandemic and changing consumer behaviour. Online sales growth has largely plateaued, with retailers increasingly reinvesting in physical stores as part of integrated omnichannel strategies. This reflects a more balanced relationship between digital and bricks and mortar retail, where physical stores remain important for customer engagement, brand presence and last-mile fulfilment (Knight Frank, 2025).

Within Warrington, these national trends are reflected in an ongoing reshaping of the Borough's retail and leisure offer. The town continues to accommodate a substantial quantum of retail floorspace across the town centre, district centres and retail parks. Activity during the year highlights a combination of occupier churn, retailer re-investment and the growing role of leisure and food and beverage operators in sustaining footfall across key locations.

Golden Square

Warrington's town centre remains the town's primary retail destination, including the Golden Square Shopping Centre, the new Times Square development, and surrounding high street frontages.

Golden Square continued to attract occupier interest, recording six new retailers acquiring space in the shopping centre in 2025. Retail additions included value retailer One Beyond, children's retailer Kids Heaven, and discount giant B&M which relocated from Cockhedge into the former Wilko unit. Alongside these new occupiers, existing retailer continued to invest in the centre, with Shoezone relocating to a larger unit and Pandora temporarily closing for refurbishment.

The shopping centre also strengthened its food and beverage offer during the year, with the opening of American fast food chain Taco Bell, much loved chicken vendor chain Roast, and The Dubliner Irish bar within the Old Market Place area, replacing the former Flanagan's Irish bar.



THE DUBLINER



TACO BELL

Flight to Affordability

Although inflation began to ease through 2024 and into 2025, household budgets remained under pressure following several years of high living costs. This has continued to shape consumer spending behaviour, with many shoppers prioritising value and convenience. This trend is reflected in Warrington's retail activity, where value-led operators such as One Beyond and discount retailer B&M have taken space.

Discounters became clear beneficiaries of stagnant real wage growth and pandemic frugality, catalysing a flight to affordability. These brands capitalise on efficient operating models and value-led propositions to win market share (Savills, 2025). The continued demand for value stores highlights the resilience of discount retail formats during periods of economic uncertainty, as consumers increasingly seek lower-cost alternatives for everyday purchases.

An obvious example of the shift to maximising affordability in Warrington is the growth of budget supermarket Lidl. Lidl overtook Morrisons to become the fifth biggest supermarket chain across the UK in 2025. In Warrington, the supermarket chain already operated four stores and announced plans during the year to deliver three more as part of its wider £500 million UK expansion. One of the most advanced proposals will be located in Pinners Brow Retail Park, where Lidl acquired multiple units previously occupied by Carpetright, The Jungle soft play centre which closed earlier in the year, and part of Sofology. The proposal involves the reconfiguration and extension of existing units in order to accommodate a new Lidl stores, alongside improvements to parking arrangements and traffic circulation within the retail park.

Time Square

After the completion of the major regeneration scheme, Times Square has solidified itself as a thriving hub of world cuisine, providing a benchmark of sophistication for modern markets and service units. Warrington Market's new traders in 2025:

- **My Avocado Lunch Box**
A healthy food vendor since March
- **Pattersons**
A fried chicken operator, opened in August
- **Pasta Master**
Providing fresh, Turkish inspired pasta dishes since August.

These additions add to over 70 vendors in the Market, which celebrated its 5th year anniversary in July. Food and beverage operators have become an increasingly important component of retail destinations, generating footfall throughout the day and evening whilst supporting the wider vitality of town centres.

However, commentary during the year suggested that financial performance of the Time Square regeneration scheme has faced challenges, with concerns raised that income projections for the development may prove ambitious.

Elsewhere in the town centre, several independent hospitality businesses opened during 2025, further expanding the café and casual dining offer. These included the trendy brunch spot Alma on Sankey St along with the versatile Village Farmhouse and Coffee Shop on Bridge St. Planning proposals have also emerged to convert the iconic Harry's Cars taxi unit into further retail offerings, demonstrating the continued appetite and need for retail space in Warrington's town centre.

Stockon Heath's ever evolving landscape

The village continues to perform as one of Warrington's most concentrated, vibrant and upmarket areas, characterised by a mix of independent retailers, modern cafes and high end bars and restaurants.

Stockton Heath's high street remained attractive with new occupiers joining the offer including Travel Lab, a specialist travel agency, and a unique gift boutique named The Rabbit Hole. This followed standard high street churn with the closure of fashion retailer Sorelle Style.

The food service offering also expanded with the opening of Acai Heaven, a health focused café, and Hungamaa, an Indian restaurant serving up quality, traditional Indian cuisine.

Shopping Centres & Retail Parks

The Cockhedge Shopping Centre's £99 million mixed use scheme is progressing well with the redevelopment of the existing shopping centre along with new residential and commercial space. Despite the longer term proposals, the centre continued to see active occupier churn in 2025. Several retailers opened or expanded within the centre, including Floor Land, Discount Direct, and an upgraded Greggs store.

At Junction Nine, activity largely centred on occupier movement and adjustments among national retailers. Furniture retailer HSL Chairs relocated to a larger showroom within the retail park with a continued confidence in the location as a destination for large format retail. Conversely, lighting retailer Pagazzi closed its doors, with the unit subsequently taken by ScS.

Riverside Retail Park gained the addition of retail giant Marks & Spencer, with the opening of the new 6,000 sq ft M&S outlet store in July. The arrival of the outlet concept reflects a wider retail trend where higher end brands use value-led concepts to maintain footfall, compete with discount operators, and monetise excess stock. Planning approval was also granted for a Starbucks drive-thru at the site of the former Harvester restaurant.

Marks & Spencer progressed its Warrington presence further at Gemini Retail Park, with the completion of its 10-month refurbishment. Introduced is an upgraded beauty department, improved café facilities and the arrival of the Mamas & Papas brand within the store. M&S is a prime example of an established retailer that has achieved long term success through evolving into a well-rounded shopping and leisure offer. They have embraced a strategy that combats e-commerce via in person experience, and the investment at Gemini demonstrates confidence in Warrington as a key location for this strategy.

The rise of sport as a social substitute

National research highlights a significant generational shift in leisure behaviour. Drinkaware's 2023 Monitor Report found that 26% of UK adults aged 18-24 now abstain from alcohol, compared with 19% in 2005, reflecting a broader move towards health-focused lifestyles among younger consumers. Instead, participation in sport and recreational fitness has increased in recent years. Sport England's Active Lives Survey reports that 63.7% of adults in England are now classified as physically active, representing the highest participation levels since the survey began. With greater consumer emphasis on leisure and wellbeing, entertainment uses are evolving, from the traditional cinema and bowling offer, to a more varied interactive offer of indoor amusements, competitive socialising and immersive leisure. These uses are accounting for a more significant proportion of shopping centre tenants and are key to improving the family destination offer.

A key component is the rapid growth of social sport. Padel tennis has emerged as one of the fastest growing sports in the UK, driven by its accessibility, flexibility and sociable format. Awareness of padel among UK adults grew to 43% in 2024, up from just 23% in 2023. Over 8 million Brits now express an interest in trying the sport. This trend is now reflected locally in Warrington, where new padel courts opened at T1 Golf Sports Village at Fiddlers Ferry in April, alongside the introduction of a footgolf course. Pipeline growth in facilities to accommodate rapid interest is evident, with planning approvals granted during the year for padel courts at David Lloyd and Birchwood Livewire Hub.

The leisure market has also seen strong growth in boutique fitness studios, particularly those offering reformer pilates. The UK health and fitness market value increased by 8% to around £5.5 billion in 2024, with boutique studios representing one of the fastest growing segments as consumers seek specialised classes over traditional gym memberships. The pilates format typically operates through small group classes and premium pricing, enabling operators to occupy relatively small commercial units while maintaining strong revenue per square metre. This gives these studios the spatial advantage of town centre operation unlike large warehouse gym units.

After gaining traction in big cities like Manchester, the trend has begun to emerge and thrive in Warrington. A notable cluster of town centre reformer studios opened during 2025, including Aleo Wellness Studio in Roebuck Plaza, Flow Nova Studios on Milner Street and the Village Hotel, alongside Basye Studio in Stockton Heath. Warrington's ability to adapt to emerging leisure trends has strengthened the resilience of its local economy, with fitness, social sport, and experimental leisure uses playing an increasingly important role in sustaining footfall and supporting the vitality of its retail destinations.



PADEL COURTS AT DAVID LLOYD

Recognition and Awards

Warrington's retail and leisure sector received notable national recognition for its 2025 offering:

- *Bents Garden & Home, Glazebury: named among the best retailers in Europe. The business has developed into a significant regional retail attraction, drawing visitors from across the North West*
- *The Parr's Bank Hotel, Warrington Town Centre: received the Small Serviced Accommodation Award, recognizing the quality of its boutique hotel offering within the restored Grade II listed former bank building*
- *The Knitting Network, Culcheth: three industry awards given to the UK's largest dedicated yarn retailer, praising the firm's continued success as a specialist retailer*
- *Kenyon Hall Farm Shop, Croft: named Best Farm Shop in the UK.*



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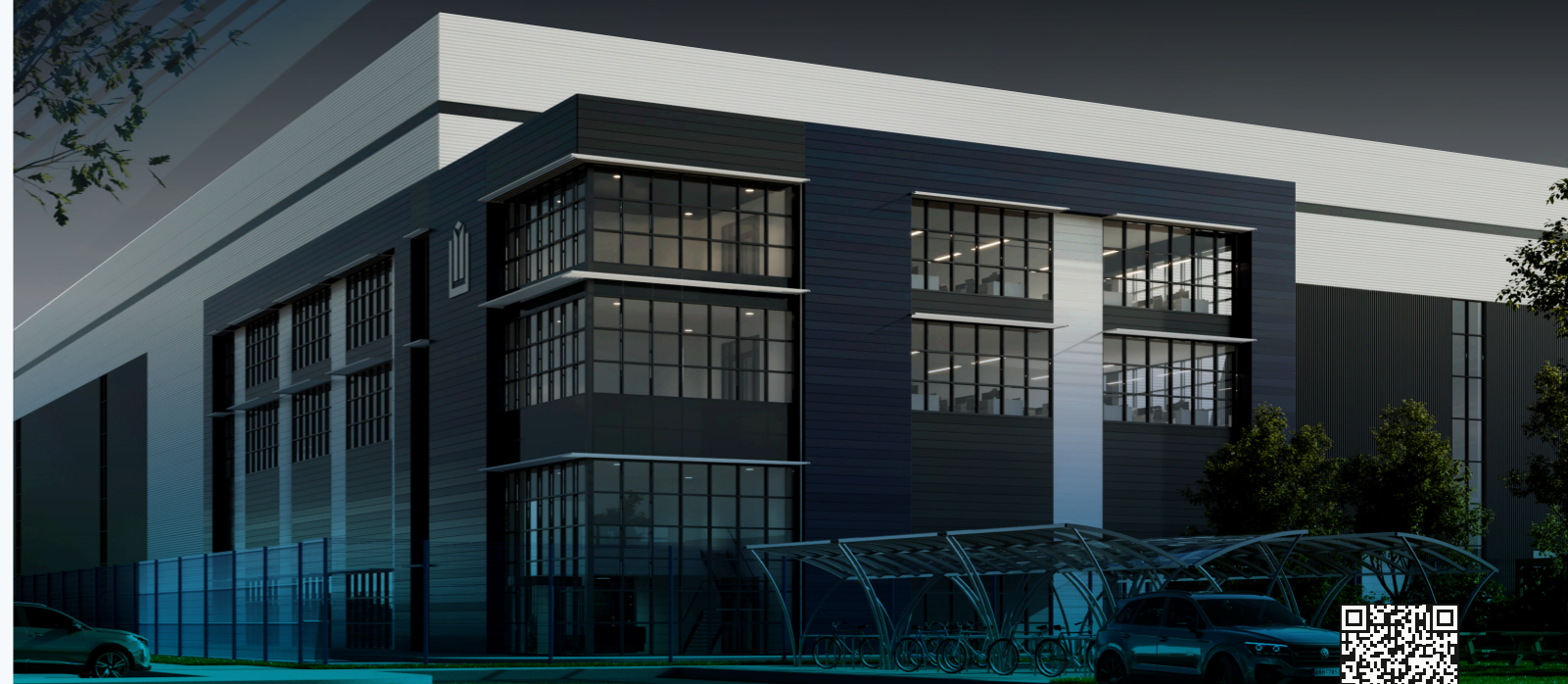
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Residential

An ever attractive and in demand residential market.

Data taken from Rightmove highlights an ever attractive and in demand residential market, with an average house price of £275,650 over the last 12 months. This was slightly above the national average of £270,259, as of December 2025.

Rightmove data used to compile the Warrington house sales table below provides an indication of the structure of Warrington’s residential market and this has changed year on year. Whilst not necessarily a comprehensive depiction of all sales and prices, the data does offer a useful overview of prevailing market trends. A total of 1,650 residential property sales were recorded, representing a 7.6% increase compared with the previous year. The distribution of sales by property type remained broadly consistent with previous years, with semi-detached properties accounting for 40% of sales, followed by terraced properties at 27%, detached homes at 24%, and apartments at 10%.

Housing Affordability

Warrington’s residential property affordability held well against regional and national benchmarks, despite a relatively strong average house price. The affordability ratio measures the relationship between house prices and earnings, indicating how many times the median annual salary would be required to purchase the average home.

Based on the Rightmove average house price of £275,650 and a median annual salary of £41,486, Warrington recorded an affordability ratio of 6.6. As shown in Table 6, this sits below the national ratio of 6.9, indicating that housing in the town remains marginally more affordable than the UK average. This is largely attributable to comparatively strong local earnings, which help offset Warrington’s slightly higher house prices when compared with national averages.

However, affordability remains weaker than the North West average, where the ratio stands at 5.8. The lower regional ratio is primarily driven by significantly lower house prices across the North West housing market. In contrast, Warrington’s position with the Liverpool-Manchester corridor and its strong employment base continue to support higher property values.

Warrington House Sales, by Property Type (Last 12 Months)

SOURCE: Rightmove, as of 30th February 2026

HOUSE TYPE	SALES	CHANGE FROM 2024 (+/-%)	AVERAGE PRICE (£)	CHANGE FROM 2024 (+/-%)
Detached	395	14.5	£465,454	1.5
Semi-Detached	654	8.5	£282,961	5.1
Terraced	441	3.3	£214,823	10.5
Apartments	160	0.6	£139,362	2.1
TOTAL / AVE	1,650	7.6	£275,650	4.2

WBC has provided annual housing completion data for the 2024/25 period, comprising a net completion total of 591 dwellings (608 gross and 17 losses). This is a decrease from the net additional dwellings that were reported in the previous monitoring period (654) and is slightly lower than the stepped housing requirement for this year of the Plan (678). However, the cumulative total of completions for the first 3 years of the new Local Plan Period significantly exceeds the stepped requirement for these 3 years.

As with the previous year, Bewsey & Whitecross saw the majority net housing completions, with 388 total dwellings built. 223 dwellings came from the completion of the apartment complex at John Street. Burtonwood and Winwick saw a notable 87 completions as the residential sections of the vast Omega South development continued construction. Rixton & Woolston saw notable completions this year, with 31 net new dwellings, 21 of which were new apartments converted from the offices of William Tarr and Co Ltd.

Housing Affordability Ratios | 2025

SOURCE: Rightmove & ONS 2026

AREA	OCTOBER 2025 AVG HOUSE PRICE	2025 MEDIAN SALARY	2025 AFFORDABILITY RATIO	COMMENTARY
Warrington	£275,650	£41,486	6.6	Higher earnings moderate affordability pressures, despite considerably higher house prices than regionally.
North West	£217,000	£37,445	5.8	Lower house prices and earnings growth maintain comparatively strong regional affordability.
UK	£270,295	£39,039	6.9	Marked improvement in affordability driven by stronger national earnings growth

Warrington Housing Completions by Ward | 2024/25

SOURCE: WBC 2026

WARD	2024/25 NET HOUSING COMPLETIONS
Appleton	24
Bewsey & Whitecross	388
Burtonwood & Winwick	87
Culcheth, Glazebury & Croft	20
Fairfield & Howley	8
Grappenhall & Howley	1
Latchford East	5
Latchford West	4
Lymm South	7
Orford	9
Poplars & Hulme	4
Poulton North	2
Rixton & Woolston	31
Stockton Heath	1
TOTAL	591

Warrington Housing Completions by Room | 2024/25

SOURCE: WBC 2026

HOUSING	1-BED	2-BED	3-BED	4-BED+	TOTAL
Standard	1	10	85	75	171
Affordable	0	21	24	0	45

APARTMENTS	1-BED	2-BED	3-BED	4-BED+	TOTAL
Standard	267	93	3	0	363
Affordable	23	6	0	0	29

Notable completions for the monitoring period include:

LAND AT JOHN ST / WINWICK ST, BEWSEY & WHITECROSS

Development by Palmus Developments Ltd, where a further 223 dwellings were completed during the monitoring period, within an eight storey building comprising a mix of one and two bedroom apartments. This brought the scheme to completion with a total of 359 apartments.

HOLY TRINITY VICARAGE, PALMYRA SQUARE NORTH, BEWSEY & WHITECROSS

Completion of an apartment complex by Torus delivering 23 apartments consisting of one and two bedrooms, all of which are affordable.

OMEGA SOUTH PHASE 6, BURTONWOOD & WINWICK

Continued delivery of the Bloor Homes development, with a further 64 dwellings completed during the period. The scheme comprises a mix of two, three and four bedroom houses, including 37 affordable units. This brings the total number of dwellings delivered within the phase so far to 159, with a target of 195.

OMEGA SOUTH PHASE 7, BURTONWOOD & WINWICK

Delivery commenced on the Bellway Homes scheme, with the first 21 dwellings completed during the monitoring period. The development will provide a mix of three and four bedroom houses, with a total target of 195 dwellings.

THE BOROUGH HAS DELIVERED A RANGE OF HOUSE AND APARTMENT SIZES.

One and two bed apartments and three bed houses were most common in delivery. However, there was a relatively low number of one and two bedroom houses delivered compared to the borough wide monitoring target. Smaller units have predominantly been provided in flatted developments within the town centre.

74 housing completions or 13% of overall supply were classed as affordable. This fell from 22% affordable stock in the previous year. The majority of the 2024/25 affordable offerings were two bed houses, one bed apartments for social rent & one bed apartments and two & three bed houses on shared ownership at Omega South and Holy Trinity Vicarage.

Housing Developments

FIDDLERS FERRY

Progress is being made with the Fiddlers Ferry Development Framework being approved by the Council's Cabinet in September 2024 and consultation having been completed on the emerging South East Warrington Urban Extension Development Framework. It is anticipated this will be approved in spring 2026. The expected start date on this site has been pushed back one year (to 2026/27).

The emerging proposals for the Fiddlers Ferry site form a major mixed use regeneration scheme for the former power station site. As part of the wider development, current plans include the delivery of up to 860 new homes, supported by new infrastructure, green space and community facilities. The residential element will play a key role in transforming the large brownfield site into a new sustainable neighbourhood, contributing significantly to Warrington's future housing supply.

OMEGA

Cities Outlook commended WBC, stating they have "been responsive to housing demand and particularly active in enabling commercial space expansion. Most significant in the last decade has been the development of the Omega business park in the north west of the city."

The last residential space at the old 600-acre RAF airbase development was distributed in 2025. First, housebuilders Anwyl secured approval in February for their 157-home plan named Eagles Green, spanning 12.5 acres. The mix of one to five bedroom detached and semi-detached homes, with 25% allocated as affordable, is now under construction until summer 2027.

Then, in November, Miller Homes agreed terms to acquire the final residential parcel capable of delivering 68 homes, subject to planning approval. The scheme represents the final phase of housing development within the wider Omega masterplan, marking the completion of the residential component of the region's largest mixed-use developments.

TOWN CENTRE

As part of the ongoing Cockhedge redevelopment scheme led by Altered Space, plans have been brought forward to deliver around 900 within the town centre. The scheme forms part of the wider regeneration of the Cockhedge Shopping Centre and represents a significant opportunity to increase town centre living. Development and funding partners are currently being sought for the first phase of the scheme, which is expected to deliver approximately 300 apartments.

Over on Academy Street, a scheme of 76 apartments was approved in the summer. The proposal will deliver a six-storey building, contributing to the continued intensification of residential development within the central location.

ORFORD

The second phase of the Peel Hall development, a major joint residential scheme delivered by Countryside and Torus, was approved in December. This phase will deliver another 501 homes, bringing the total number of homes approved on the wider 170-acre Peel Hall site to around 900, with the full scheme expected to produce up to 1,200 dwellings. The approved phase will include 344 market sale homes, 69 affordable rent units and 88 affordable home ownership properties, comprising a mix of two, three and four bedroom houses, alongside public open space and new access infrastructure.

Looking Forward

The Warrington economy enters its next chapter from a position of enviable strength.

The Centre for Cities' Cities Outlook 2026 identified the town as one of the UK's top performers, ranking 5th out of 63 major urban areas for growth in living standards. Disposable income rose 5.3% between 2013 and 2023, more than double the national average. This strong economic foundation sets the tone for a property market poised for continued expansion, regeneration, and investment confidence.

Warrington's economic resilience - described by the Centre for Cities as part of a "high growth" group - continues to underpin demand for both residential and commercial property. The town's strategic location, strong employment base, and ongoing regeneration projects reinforce its reputation as a

northern success story. Indeed, the same report was confident that Warrington has "gotten the ingredients right, through local policy choices that foster economic development". Much of this started when Terry O'Neill became Leader of the Council in 2011 and continues today with Hans Mundry in charge.

The next two years will see a significant uplift in new housing supply, with 870 new homes scheduled for completion in 2026/7. This surge reflects both market demand and Warrington's commitment to reshaping its urban core, as captured in Warrington Means Business and the Local Plan.



Warrington Town Centre

KEY SCHEMES INCLUDE:

- Academy Way (town centre) - A major 240 home affordable apartment development, submitted by Habiko (Muse, PIC, Homes England). Two six storey buildings will deliver one and two bed homes around a landscaped courtyard, forming the next phase of the Time Square regeneration.
- Town Centre Intensification - Numerous schemes across Mersey Street, Time Square's periphery, and other central sites continue to transform the urban skyline, with 2026/7 expected to be "as busy - if not more" than 2025 for planning activity.
- Together, these developments will diversify Warrington's housing stock, support affordability, and attract new residents aligned with the town's growing employment opportunities.
- The most transformative change on the horizon is the establishment of the Cheshire & Warrington Mayoral Combined Authority, following government approval and Parliamentary progression of the required orders. Nick Walkley has taken up the post of Interim Chief Executive to prepare the county for an exciting new era.

KEY MILESTONES INCLUDE:

- Mayoral elections scheduled for May 2027, giving the region a directly elected leader with strategic powers
- At least £650 million in long term investment unlocked, with devolved control over transport, skills, and economic development
- Confirmation that the region is part of the Government's Devolution Priority Programme, accelerating timelines and ensuring strong central support.

FOR THE PROPERTY SECTOR, DEVOLUTION PROMISES:

- More coordinated spatial planning
- Greater certainty for infrastructure investment
- Enhanced ability to align housing delivery with economic growth
- A stronger regional voice in national policy.

There are challenges, and although global, these will inevitably affect local regeneration activity. Continued low economic growth, military conflicts and President Trump's tariffs all create uncertainty, together with higher operating costs. An increase in the price of oil makes it more expensive to produce the basic materials of construction - steel, bricks, plastics and paint. Nevertheless, with a strong economy, ambitious regeneration pipeline, and imminent devolution, Warrington is well positioned for sustained property market momentum. The convergence of strong fundamentals - rising incomes, strategic investment, and a rapidly evolving town centre - suggests that the next phase of Warrington's growth will be both dynamic and transformative.

The 28th Warrington Property Review therefore looks ahead with confidence: Warrington is not only keeping pace with national trends - it is setting them.



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BEgroup

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BE Group is a planning and regeneration consultancy and has over 40 years' experience of working in the Warrington commercial property market. This report has been carefully prepared, however it is for general guidance only and Warrington Borough Council, Warrington & Co. and BE Group cannot guarantee that there are no errors or omissions.

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