

Cheshire West and Chester Property Review 2026



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Foreword



Councillor Nathan Pardoe

Cabinet Member for Inclusive Economy,
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Cheshire West and Chester Council

The Cheshire West and Chester Property Review 2026 showcases our growing economy across industrial, retail, leisure and the housing market.

Our borough has the fourth largest economy in the North West, with a Gross Value Added, GVA of £14.2bn and the second largest manufacturing economy in the North West by GVA, contributing £2.5bn to the economy.

Our growing and vibrant economy demonstrated substantial growth with a rise in businesses almost three times the level recorded in 2024, and that the local business base is becoming more resilient as well as more dynamic.

In addition to completed projects, throughout this review you will see substantial future planned activity across the borough, including ongoing town centre regeneration projects, businesses coming to the borough and developments with planning permission that are currently underway.

In Chester, the retail and hospitality sector was very buoyant, Ikea opened at Greyhound Retail Park, along with a second Lidl store at Caldley Valley Retail

Park, and work commenced on the construction of the Harrods H Beauty store and on an Ibis Styles hotel on the former Mecca Bingo site.

The Rooftop Social Club was described as "a genius transformation of an unused space in the heart of a historic city" by judges as the scheme was recognised at the Northern Design Awards 2025, winning the "Conversion, Redesign, Repurpose" category.

Plans progressed for the relocation of Northwich Market to a new indoor facility at Barons Quay and planning permission was granted to more than double the size of Weaver Vale Garden Centre, including a café and expanded retail floorspace.

Work also commenced on the transformation of Ellesmere Port Market and the town centre regeneration plans benefitted from the demolition of the former Council offices at Civic Way to progress the plans for new town-centre housing.

Phase one of Winsford town centre regeneration became operational, with an increased footfall of 10% following the opening which included a new B&M superstore and garden centre.

A total of 1,202 new homes were completed across the Borough, exceeding the current local plan annual target of 1,100 dwellings, with 352 dwellings delivered as affordable housing.

Winsford transacted the most floorspace with 25,968 sqm across six deals, including the largest transaction at The Quad 22,257 sqm.

In total, 87 office transactions were recorded, a 33.8 percent increase in deals compared with 2024, and a 22.5 percent increase in total floorspace.

Finally, as we look towards 2026, major changes are underway with the creation of the Cheshire and Warrington Mayoral Combined Authority in April 2026 which will have powers relating to transport, skills, planning and investment including a 30-year investment fund worth £650 million.

“ Our borough has the fourth largest economy in the North West, with a Gross Value Added, GVA of £14.2bn and the second largest manufacturing economy in the North West by GVA, contributing £2.5bn to the economy. ”



Executive Summary

Economy

Cheshire West and Chester's economy continues to improve across several metrics, including net business growth, unemployment, visitor economy and Gross Value Added, (GVA).

- Net business numbers growth of **+195** in 2025 was the highest figure since the pandemic, building on net growth of **+70** in 2024
- The borough has the fourth largest economy in the North West, with a GVA of **£14.2 billion**
- The borough has the second largest manufacturing economy in the North West by GVA, contributing some **£2.5 billion** to the economy
- Unemployment is low at **2.6 percent**, with the borough consistently having unemployment rates lower than regional and national averages
- The visitor economy contributed some **£2.5 billion** to the economy in 2024, up 10 percent from the previous year and supported over 22,400 jobs.

Retail & Leisure

In 2025, the retail and leisure market in Cheshire West and Chester was driven by occupier reconfiguration and regeneration activity. Chester remained the borough's primary retail and leisure centre and the focus of major visitor attractions, while Northwich, Winsford and Ellesmere Port progressed town centre regeneration centred on markets, food and leisure uses.

For lease transactions, 6,950 sqm of floorspace was transacted across 47 deals in 2025, a 17 percent decrease on the 8,361 sqm recorded in 2024 but a 20 percent increase in deal volume.

Chester

- New city centre retail lettings included **Sweaty Betty** at 22 Bridge Street and Utility at Eastgate Row
- **Ikea** opened a new format store at Greyhound Retail Park
- Construction commenced on a second **Lidl** store at Caldys Valley Retail Park (now completed and open)
- Major leisure investment was led by **Chester Zoo**, with the opening of the Heart of Africa habitat and 51 on-site lodges at The Reserve.

Northwich

- Plans progressed for the delivery of a new **Northwich Market** at Barons Quay
- **Wild Tots** reopened as an indoor play area and café
- Planning permission was granted to more than double the size of **Weaver Vale Garden Centre**, including a café and expanded retail floorspace.

Winsford

- Phase one of the town centre regeneration became operational, anchored by a 1,850 sqm **B&M store** and garden centre
- Early monitoring indicated a circa 10 percent uplift in footfall following opening
- **Sport Direct** opened a 700 sqm store at the newly refurbished Winsford Cross Shopping centre.

Ellesmere Port

- **Cheshire Oaks** saw nine new retail and restaurant openings across 2025, including major names like ESPA, Playmobil, Chit 'n' Chaat and Greggs
- Refurbishment works progressed at the **town centre market**
- Major food retailers **Farmfoods**, **Tesco Express** and **Lidl** opened new stores across the area.

Residential

The latest data from BuiltPlace shows 4,499 properties were sold during 2025. This represents 80 percent of the long-term average. Second hand properties accounted for 98 percent of all transactions and 2 percent new builds.

A total of 1,202 net new homes were completed across the Borough across April 2024-25, with 352 dwellings (29 percent) delivered as affordable housing.

The highest levels of development were seen in:

Ellesmere Port: 340 completions
Northwich: 286 completions
Rural: 280 completions

Multiple major residential development schemes progressed in 2025, including:

- **Kings Moat Garden Village, Wrexham Road, Chester, Redrow and Taylor Wimpey** delivered a further 110 homes in 2024/25, taking total completions on the scheme to 722 dwellings. With a final total of 1,269 homes expected, permission was granted for a new primary school and construction is underway
- **Chester Northgate regeneration** - a pre - development agreement was secured to progress the next residential-led phase of the Northgate regeneration. The scheme is expected to deliver around 400 homes in the city centre
- **Weaver Square, Northwich** - a pre-development agreement was secured to advance the Weaver Square regeneration, a residential-led town centre scheme expected to deliver over 100 new homes

- **Winsford Station Quarter** continued to represent the single largest residential opportunity in the Borough, with capacity for approximately 1,100 homes. The scheme will bridge the functional gap between the railway station and the waterfront in combination with broadening the town’s housing offer.
- **Ellesmere Port town centre regeneration**, as part of the £13 million Ministry for Housing, Communities and Local Government programme, progress was made towards the delivery in excess of 180 new homes in the town centre, with demolition of the former Civic Way council offices and surrounding buildings completed to enable a residential-led redevelopment focused on low carbon, family and first-time buyer housing.



Industrial

Industrial take up totalled 50,181 sqm across 31 transactions in 2025, with average rents at about £94/sqm (£8.73/sqft). Overall floorspace transacted was lower than in 2024 due to the unusually large transaction at Link Logistics Park in 2024. Take up aligns with that of other previous years.

Notable features of the industrial market in 2025 in the borough:

- Chester led the borough in the number of industrial deals with 15 deals comprising 5,541 sqm
- Winsford transacted the most floorspace with 25,968 sqm across six deals, including the largest transaction at The Quad 22,257 sqm
- Ellesmere Port 17,549 sqm transacted across six deals.

Chester continued to strengthen as the borough's principal office market. Chester recorded 11,044 sqm over 74 deals, making up 87 percent of the deals volume and 80 percent of total floorspace.

Office

In total, 85 office transactions were recorded, equating to 13,883 sqm of transacted floorspace. This represents a 32 percent increase in deal volumes compared with 2024, and a 15 percent increase in total floorspace from 12,066 sqm.

Rent across all sized units averaged at £180.03/sqm (£16.73/sqf.)

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Investment



Investment activity in the borough moderated in 2025, with 11 transactions recorded compared to 19 in 2024, and around £30 million of disclosed investment. This reflects a more selective market following a stronger level of activity in previous years.

The industrial sector remained the most active, attracting both UK and international investors and accounting for the majority of transactions. Winsford accounted for three of these industrial investments, totalling £17.7 million.

Yields remained broadly stable, with industrial investment deals typically achieving around seven to eight percent, indicating continued demand for well-let assets. Retail and office investment activity was much more limited.



Economy

Cheshire West and Chester’s economy continued to improve across several metrics, including net business growth, unemployment, visitor economy and GVA.

Table 1

Cheshire West and Chester Economic Indicators, 2025					
Economic Indicator	2025	2024	Change (%)	North West (2025)	National (2025)
Employment rate (%)	76.8%	76.5%	+0.3%	74.2%	76.1%
Unemployment rate (%)	2.6%	2.7%	-0.1%	3.6%	3.8%
Average house price (£)	£267,000	£277,000	-3.6%	£214,000	£270,000
Average monthly rent (£)	£910	£896	+1.6%	£860	£910
Visitor economy Value (£bn)	£2.48bn (2024)	£2.23bn (2023)	+9.9%	N/A	N/A

Source: ONS, Rightmove, STEAM, 2026

As presented in Table 1, the borough’s employment rate increased slightly over the last year to 76.8 percent, remaining above both the North West and national employment rates. At the same time, unemployment fell to 2.6 percent, again reinforcing evidence of **a relatively tight local labour market compared to both regional and national benchmarks.**

Cheshire West and Chester ranked fourth overall in the North West for Gross Value Added (GVA) in 2023 at £14.2 billion (current prices measure), behind only Manchester (£35.9 billion), Liverpool (£18.4 billion) and Cheshire East (£16.9 billion).

Table 2

GVA by North West Local Authority, 2023		
Rank	Local Authority	GVA (£M)
1	Manchester	35,873
2	Liverpool	18,431
3	Cheshire East	16,927
4	Cheshire West & Chester	14,193
5	Trafford	12,304

Source: ONS Regional Gross Value Added



“ Cheshire West and Chester’s economy continued to improve across several metrics, including net business growth, unemployment, visitor economy and GVA. ”

Cheshire West and Chester recorded the second highest manufacturing GVA figure in the North West at £2.4 billion, highlighting the importance of this sector in the regional economy.

Table 3

Manufacturing GVA by North West Local Authority, 2023		
Rank	Local Authority	GVA (£M)
1	Cheshire East	4,833
2	Cheshire West & Chester	2,488
3	Westmorland & Furness	2,293
4	South Ribble	1,206
5	Stockport	1,149

Source: ONS Regional Gross Value Added

The borough also has a significant services economy, valued at £10.6 billion in 2023, ranking it fourth in the North West.

Table 4

Services GVA by North West Local Authority, 2023		
Rank	Local Authority	GVA (£M)
1	Manchester	32,995
2	Liverpool	16,205
3	Cheshire East	10,783
4	Cheshire West & Chester	10,559
5	Trafford	10,181

Source: ONS Regional Gross Value Added

Business demography across Cheshire West and Chester, measured in terms of local business units, shows that **the shift towards net business growth has become more firmly established**. 2024 marked the first year since before the pandemic in which business births exceeded business deaths, resulting in a net increase of 70 business units. This strengthened further in 2025, when **net business growth rose to 195 additional business units, almost**

three times the level recorded in 2024. In a post Covid environment where commentators have questioned whether support measures reduced business dynamism, this business demography research suggests that business exits have not simply been postponed and that Cheshire West and Chester is emerging in a more robust manner. **The 2025 net uplift is consistent with a local business base that is becoming more resilient as well as more dynamic.**

Figure 1

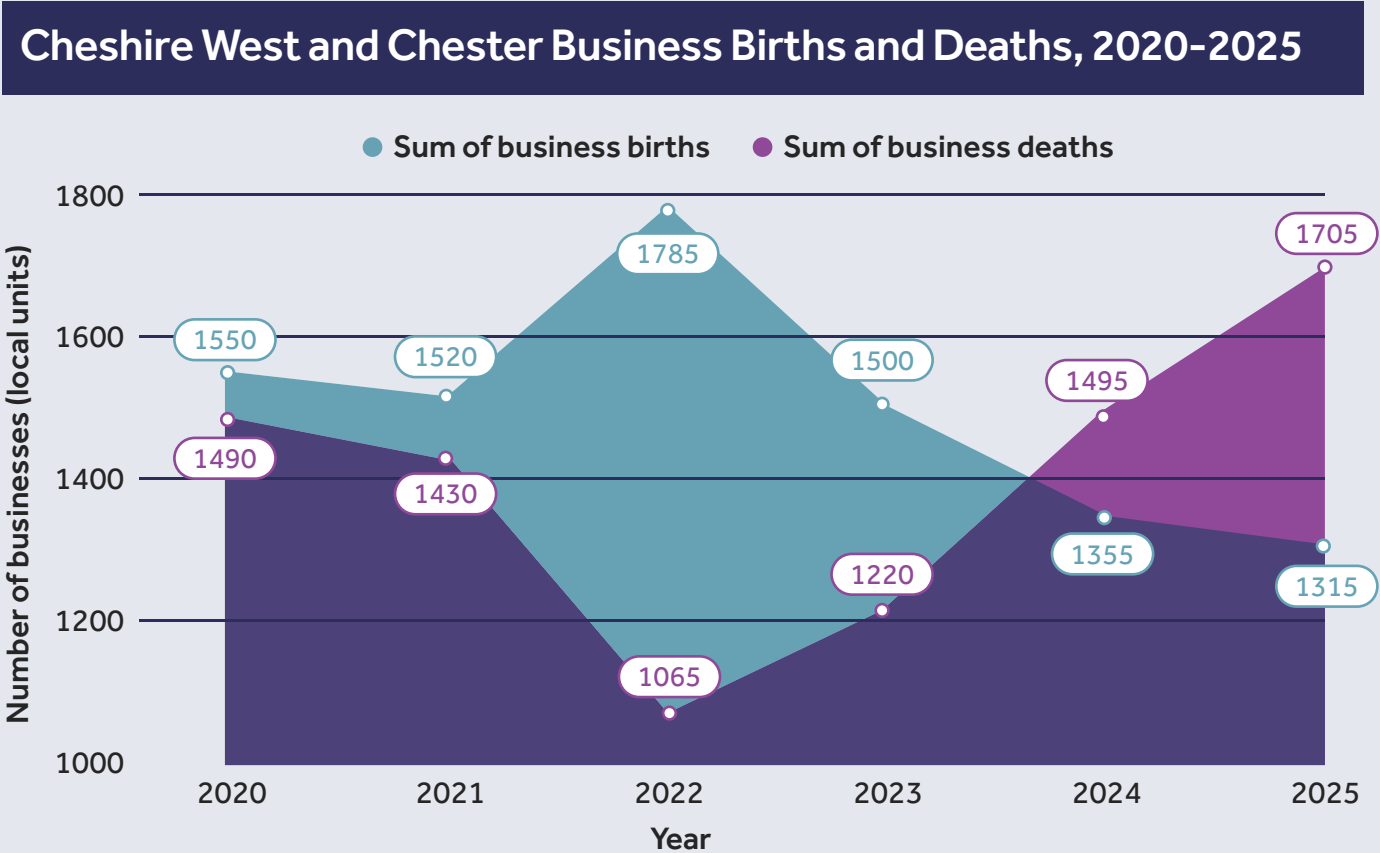
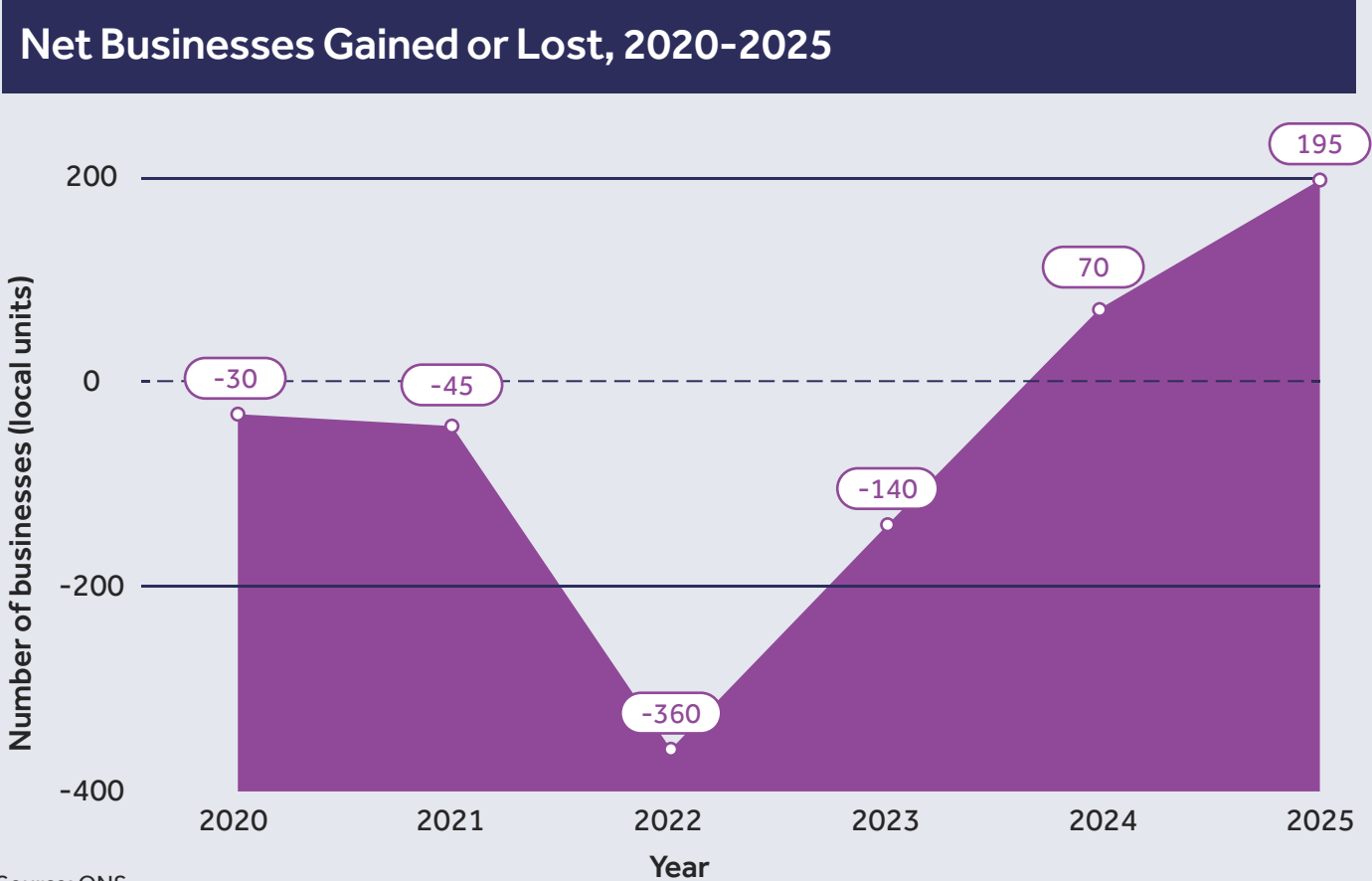


Figure 2



Sectoral business structure:

- **In 2025, professional, scientific and technical services remained the largest sector in the borough** with 2,775 local business units or 17 percent of the economy. Despite recording the largest absolute decline since 2020 (down 295 units or -9.6 percent), the sector returned to growth in 2025, increasing by around 40 units from 2024 (1.5 percent increase). This indicates stabilisation following several years of contraction after Covid and suggests renewed interest for office space.
- **The property sector recorded the largest increase in businesses since 2020**, rising by around 100 units (17 percent increase). This is closely followed by both the **health** sector and **arts, entertainment and recreation** with each sector recording an increase of 95 business units (11.3 percent and 9.2 percent increase respectively). Together, these trends point to a broad strengthening of demand.
- **Accommodation and food services grew by 85 units.** This reflects the **longer-term growth of the visitor economy**, confidence in the town centres and continued demand for retail, leisure and hospitality floorspace.

Most recent STEAM data (2024) reports Cheshire West and Chester saw 32.9 million visitor days, **driving the visitor economy value up by almost 10 percent to £2.48 billion and supporting 22,441 jobs** across the borough.

At a wider level, the Cheshire and Warrington region's combined visitor economy, including Cheshire East and Warrington, surpassed £4.3 billion in value with 59.3 million visitor days recorded. Cheshire West and Chester is the largest contributor to the combined authority's visitor economy, generating over half (55 percent) of all visitor days and **delivering over half of the total visitor economy value (57 percent)**. This reflects the concentration of regionally and nationally significant visitor attractions such as Chester Zoo, Cheshire Oaks, Chester's historic city centre plus waterways and green spaces.

Digital infrastructure investment has continued across Cheshire West and Chester, with full fibre (Fibre to the Premises, FTTP) coverage reaching around 87 percent, above the national average of roughly 70 percent. This level of coverage supports day-to-day business operations that depend on reliable bandwidth, including professional services, digital and creative firms, and hybrid-working requirements in the office market. In Chester, the rollout of small-cell 5G, with around 10 new small-cell sites, become operational in early 2026, and further deployment is planned during the year. This strengthens connectivity in high footfall and high-density areas where traditional mast coverage can be constrained, improving mobile performance for businesses, visitors and town centre users. Work is also progressing on additional mast provision, although delivery can be affected by constraints around site access, land interests and the limits of mobile coverage reporting.

Image: Winsford Town Centre



Retail & Leisure

Overall, the retail and leisure sector in Cheshire West and Chester has seen significant activity in 2025, highlighted by several high-profile brands locating in the borough.

Retail

National research published by Knight Frank indicates that, following significant disruption from the pandemic and shifts in consumer behaviour, there was a **stabilisation in online retail activity in 2025**. The research points to a more **sybiotic relationship between online and bricks and mortar retail**, with investment increasingly directed back towards physical stores as part of omnichannel strategies. (Knight Frank, 2025). Locally this has coincided with a pattern of retail activity focused on reuse, consolidation and reconfiguration of existing floorspace, rather than solely the delivery of new-build retail and leisure development.

A total of 6,950 sqm of leased retail floorspace was transacted across 47 deals in Cheshire West and Chester throughout 2025. Compared to the previous year, leased floorspace fell by 17 percent but the deal volume increased by 8 deals (20 percent rise), meaning **there were more retail units of a smaller size transacted in 2025**. Freehold sales contributed another 1,815 sqm across 11 deals.

Chester

Chester remains the borough's principal retail centre, supporting the greatest quantum of retail floorspace. 5,673 sqm of retail space was leased across the city over 2025, **82 percent of the leasehold total**, across 43 deals. A further 1,325 sqm was transacted over nine freehold sales.

New Chester retail occupiers in 2025 included:

- Sweaty Betty** – 22 Bridge Street: The activewear brand opened a new Chester city centre store in December, adding Chester to its UK network of 70 locations, including Cheshire Oaks, and with stores also extending worldwide. The 205 sqm unit was let by Chester Race Company Ltd on a five year lease, achieving a rent of £280 per sqm (£26/sqft). The letting was handled by Kenney Moore.
- Utility** – 50 Eastgate Row: The independent design and gift retailer opened its Chester store in May, taking a 322 sqm unit that had remained vacant since 2020 following the departure of OFFICE Shoes. Utility Retail Ltd agreed a 10 year lease with Frazers Group Ltd, at a rent of £202/sqm (£19/sqft). The letting was also handled by Kenney Moore.
- Lucy & Yak** – 6-8 Werburgh Street: The sustainable and inclusive fashion brand opened its 12th location in the UK. The unit was let through Legat Owen.
- Cheshire Fudge Company** – 76-79 Faulkner Street, Hoole: Beyond the city centre, Cheshire Fudge Company relocated from Liverpool to Chester in December, securing a five year lease on a 43 sqm unit for £237/sqm (£22/sqft). The fudge selection operates as part of the dessert café 'Crumble Country', contributing to a wider café and food-led offer in Hoole. The letting was handled by Bolton Birch.
- Rituals** – Unit 7 Eastgate Square, Newgate Mall: The popular fragrance and wellbeing brand from Amsterdam opened in September.



- **Chester Market** – celebrated its third birthday having welcomed over seven million visitors and gained a host of awards; now recognised as a benchmark for new markets under development across the country.

Ikea opened in Chester as a scaled-down store format of around 2,800 sqm, occupying a space at Greyhound Retail Park. The store operates with a reduced in-store range with greater emphasis placed on digital ordering, click-and-collect and in-store design services. This approach demonstrates how existing retail warehouse stock can be adapted through internal reconfiguration and revised layouts to make more efficient use of available floorspace, avoiding reliance on traditional large format models and the need for new build development.

Progress continued in Chester in 2025 on the construction of the **H Beauty** store by Harrods. The 2,200 sqm luxury Harrods department offshoot has now opened in February 2026, in part of the former Debenhams store, complementing the existing Chester offer whilst attracting a new audience and driving footfall.

Elsewhere in the city, construction began in 2025 on a second **Lidl** store at Caldys Valley Retail Park, following planning permission granted in 2024, now open. The development combines two existing B&M and Rightway units to create a store of around 1,400 sqm and is expected to create around 40 jobs, with construction now complete. The DIY store **Rightway** relocated and reopened for business in June at Tarvin Road, Boughton.

Ellesmere Port and Cheshire Oaks

Cheshire Oaks celebrated its 30th anniversary in 2025, having welcomed over 570 million visitors to the centre. The iconic shopping destination has been extended on several occasions to now boast more than 37,000 sqm (400,000 sqft) of retail space that houses over 150 stores and food outlets, employing over 4,000 people. Its high profile and wide range of leading brands, including nine new retail and food options in 2025, draws visitors from a wide catchment area, creating vast expenditure and activity in Cheshire West and Chester.

New Cheshire Oaks retail openings in 2025 included:

- **ESPA** – The luxury skincare brand, previously sold online or in spa locations, opened its first ever physical store at Cheshire Oaks in April
- **Joseph** – British contemporary women's designer brand opened in October
- **Whistles** – Another British luxury brand providing contemporary options for women joined the location in November
- **Weird Fish** – A Cornish clothing and accessories line opened in December
- **The Label Yard** – Premium streetwear and menswear, curating a range urban fashion since November
- **Playmobil** – International children's toy brand opened a new outlet in December.





Winsford

New retail provision within Winsford town centre has moved firmly into delivery. Phase one of the town centre regeneration scheme is now operational and anchored by a 1,850 sqm (20,000 sqft) **B&M** store and garden centre, joining a Subway and a drive-thru Costa Coffee delivered in 2024. Early monitoring indicated a circa **10 percent uplift in footfall** following operation of phase one. Further regeneration efforts involved global sportswear discounters **Sport Direct** opening a 700 sqm store in November at the newly refurbished Winsford Cross Shopping centre.

Winsford Gateway has seen a significant appearance of major names in 2025. Café giant Costa Coffee opened a new drive-thru location in April. Shortly after, the ever-popular McDonald's opened its doors on Road Six in July.

New Cheshire Oaks restaurant and takeaway openings in 2025:

- **Chit 'n' Chaat** – Manchester renowned Indian street food chain expanded its offering outside the city into Cheshire Oaks in April
- **PHO** – The healthy Vietnamese restaurant opened a new unit, serving a range of Southeast Asian dishes with plenty of vegetarian and vegan options
- **Greggs** – The national bakery giant selected Cheshire Oaks as one of the first locations to trial its 'bitesize' store format, supporting potential rollout across the UK.

Multiple major food retailers opened new locations in Ellesmere Port during 2025. Scottish retailer **Farmfoods** relocated to the new, larger location on Westminster Retail Park on Station Road in May, replacing the former Halfords store which had been vacant since the previous October. The new store is more than double the size of its previous Port Arcades Shopping Centre location. In addition, a new **Tesco Express** is being delivered at Ledsham Garden Village in Little Sutton, which was under construction in late 2025 and opened in March 2026. The store will support the delivery of the wider Garden Village scheme. At Great Sutton, **Lidl** progressed revised proposals for its first Ellesmere Port store following planning approval secured in July. The updated scheme incorporates the adjacent former McColl's unit and is expected to extend around 1,850 sqm (20,000 sqft).



Northwich

At **Weaver Vale Garden Centre**, planning permission was granted for the demolition of the existing 5,000 sqm facility and its replacement with a new centre of around 10,000 sqm, **doubling the size** of the existing operation. The redevelopment will increase the shop floor from 2,000 sqm to 4,500 sqm and provide 5,000 sqm of outdoor sales space and include a café alongside a warehouse. The scheme will deliver 361 car parking spaces including EV charging provision.

Leisure and Visitor Economy

Chester

Leisure infrastructure investment is progressing at **Chester Racecourse**, where planning permission has been secured for a £20 million transformation. Proposals include a 2,300 sqm (25,000 sqft) hospitality building with roof terrace and a 2,800 sqm (30,000 sqft) facilities hub, aiming to broaden year-round conference and events capability.

Chester Zoo completed a series of major developments in 2025 that mark one of the most significant years of change on the site in recent decades. In April, the Zoo opened its **Heart of Africa** habitat. The development covers around 22.5 acres and brings together 57 African species within a single savannah setting to expand both the physical footprint of the Zoo and the range of immersive visitor experiences available.

Later in the year, the Zoo brought forward a new on-site visitor accommodation offer with the opening of **The Reserve**. The development comprises 51 lodges positioned around landscaped lakes and wildlife viewing areas to complement the new Heart of Africa habitat. This marked the first time overnight accommodation has been offered directly within the Zoo estate.

Planning permission was granted at the former Mecca Bingo site on Union Terrace for TAG Developments' 144-bed hotel. Accor has agreed terms to franchise the development as an Ibis Styles, providing a design led economy hotel with associated bar and food space.

At Chester Northgate, restaurant operator **Maray** opened its doors in December. Having already established two successful units in Liverpool and another in Manchester, the restaurant group selected Chester as its next location and signed a 15-year lease on an 800 sqm (8,600 sqft) unit. The opening adds to the existing cluster of restaurants, cafes and bars at Northgate and strengthens Chester's role as a focal point for leisure and evening activity within the city centre.

Adding to Chester's already extensive and vibrant pub offer was **The Duck & Dagger**, located in the restored 19th century Steam Mill. The new establishment on the canal aims to offer both high quality ales and seasonal produce focused dining. The owners of the Coach House Inn secured the 313 sqm (3,367 sqft) ground floor letting via Legat Owen on a 10 year lease at £144/sqm (£13.35/sqft).

Chester's Brio **Northgate Arena** undertook a major refurbishment starting in January 2025, which will see improvements to the pool, gym, sauna and changing facilities in addition to upgrades to its energy efficiency, mechanical, electrical and plumbing systems. The Arena reopened in May 2026.

The new **Cheshire Archives Centre** is expected to open in early 2027 in Hoole, on the site of the former Enterprise Centre, as part of a National Lottery funded project to establish two new centres for the shared Cheshire Archives service, with a sister site in Crewe.

Image: The Reserve, Chester Zoo





Ellesmere Port

During 2025, physical works progressed on the refurbishment of **Ellesmere Port Market**. Current traders remained operational while installation of solar panels and upgrades to the building were implemented.

At the Port Arcades Shopping Centre, the **Coffee House** opened its 29th location across the UK at the start of the year. The much-loved northern coffee brand extended its offering to Ellesmere Port following a successful previous year with nine new stores.

Northwich

During 2025, designs for a new **Northwich Market in Barons Quay** were agreed and a procurement exercise to secure a contractor for the scheme was commenced. A decision has now been made to appoint Medlock as the contractor and works have started on site. The new market is expected to open in Summer 2026.



Wild Tots at Barons Quay reopened in April following a change in ownership. The facility operates as an indoor play area and café, bringing a family focused leisure use back into operation after a period of closure.

Winsford

The **£1 million investment** to transform **Winsford Market** over the next 12 months was confirmed. The funding is focused on improving facilities for traders and enhancing overall operation of the market. The market currently provides space for 13 traders, with investment centred around the retention of this established trader base. Longer term phases of market revamp will be dependent on availability of additional funding.



Rural

In Frodsham, independent food vendor **Bena Gelatina** has expanded its presence on Church Street, taking an adjacent unit to introduce a deli offer alongside its existing ice cream business. Also, leisure investment is being progressed through the redevelopment of the town's **Brio leisure centre** with a reported budget of £6 million. At Carden Park Hotel, planning permission was granted for the development of holiday lodges on land to the north west of the existing hotel.

The new Cheshire Archives Centre is expected to open in autumn 2026 in Hoole, on the site of the former Enterprise Centre, as part of a National Lottery funded project.

The Padel Takeover

A shift in leisure demand is evident when looking at the rapid emergence of padel tennis across the UK including in Cheshire West and Cheshire. Nationally, the sport has seen significant growth in recent years, with awareness among UK adults increasing to around 43 percent in 2024, up from 23 percent the previous year, and more than 8 million people expressing interest in participating. This reflects a wider move towards active social and experience led leisure, particularly amongst young adults who are cutting back on or cutting out drinking and substituting in social sport as their preferred social activity.

The padel trend is now translating into commercial property demand across the borough with new

padel facilities delivered in industrial / warehouse units. At Vortex Business Park near Cheshire Oaks, **Ignite Padel** opened a new padel centre in August, occupying a 1,569 sqm unit on a 15 year lease. The scheme represents a notable diversification of the primarily retail-oriented Cheshire Oaks offer. In Chester, another facility was delivered at Matrix Court, Sealand Industrial Estate, where occupiers Padel Sheds opened in October, taking a 1,125 sqm unit on a 10 year lease. While these two deals are included under industrial transactions in the later chapter, the use highlights a growing overlap between employment and leisure uses, with industrial space increasingly accommodating indoor sport and fitness operators.

Leisure Awards

During 2025, leisure and cultural assets across Cheshire West and Chester received a range of regional and national awards. Recognition spanned major visitor attractions, cultural venues and independent hospitality operators, demonstrating the strength and breadth of the borough's offer.

Chester Zoo's 'Heart of Africa' development was nominated for two awards at the North West Regional Construction Awards: 'Project of the year' and 'Integration and collaborative working'. Visitor numbers during 2025 reached a record level, with attendance exceeding 2.1 million visits across the year.

Cultural activity in Ellesmere Port also gained recognition in 2025 with the **Theatre Porto** project, which was awarded RTPI North West Awards for Planning Excellence 2025 for its transformation of Whitby Hall into a dedicated cultural venue for children and families. The project provided a new auditorium and flexible creative space for theatre, dance and performance, contributing to the leisure and cultural landscape of the town.

Rooftop Social Club, which opened in Chester city centre in 2024, received recognition in 2025. This regenerative project uses the two top floors of the Pepper Street multi-storey car park as a 300-capacity hospitality and social venue. The project reimaged underutilised rooftop space into a year-round destination with food, drink and leisure amenities.

The scheme was recognised at the Northern Design Awards 2025, winning the 'Conversion, Redesign, Repurpose' category for its adaptive use of an existing structure. In awarding the project, the judges described it as "a genius transformation of an unused space in the heart of a historic city".

Independent Chester pizzeria Stile Napoletano was named 13th best pizzeria in Europe (outside of Italy) at the Top 50 Pizza Europe Awards 2025 in Madrid. The Watergate Street pizzeria operating since 2017 was one of only three UK restaurants and the only restaurant outside of London to make the prestigious list. The business also won the award for best new entry, with judges commending their "consistency, constant attention to quality and well-defined identity".



Residential

Housing growth continues to perform at above target levels, highlighting the attractiveness of Cheshire West and Chester for residents and developers.

Housing completion information is taken over the monitoring period 1st April 2024 – 31st March 2025. Net housing completions across Cheshire West and Chester totalled 1,202 dwellings, **exceeding the annual target of 1,100 dwellings**. Ellesmere Port recorded the highest level of delivery with 340 new dwellings completed. Northwich followed second with 286 dwellings, taking delivery to over 105 percent of the area's Local Plan housing requirement to 2030.

Rural areas continued to make a significant contribution to housing growth, accounting for 280 completions. Though the Rural spatial area includes Key Service Centres, most of the rural delivery during the 2024/25 monitoring period occurred outside the borough's key service centres. Eight out of the ten Key Service Centres have already met their identified Local Plan housing requirements. Of the remaining centres, Tarvin is nearing full delivery at 96 percent, while Frodsham remains at 79 percent of its target.



Table 5

Net Housing Completions By Area, 2024 - 2025

The latest data from BuiltPlace shows 4,499 properties were sold during 2025. This represents 80 percent of the long-term average. Second hand properties accounted for 98 percent of all transactions and 2 percent new builds.

Spatial Area	Net housing completions 2024 -2025
Chester	183
Ellesmere Port	340
Northwich	286
Winsford	113
Rural (whole)	280
Total	1,202

Source: CW&C 2024-25 AMR, 2025

Housing affordability

The proportion of affordable housing within overall supply has improved over the recorded period, with the share of net housing classed as 'affordable' rising from 27 percent to 29 percent, equivalent to 352 dwellings and just one percent shy of the 30 percent affordable housing target set out by the Council's Local Plan.

According to provisional ONS data, the average house price in Cheshire West and Chester stood at around £267,000 in October 2025, maintaining values well above the North West average of £214,000 and broadly in line with the national average of £270,000.

Table 6

Housing Affordability Ratios, 2024-2025				
Area	October 2025 Average House Price	2025 Median Salary	2025 Affordability Ratio	Commentary
Cheshire West & Chester	£267,000	£37,198	7.18	Slight affordability easing driven by house price stabilisation; earnings broadly flat
North West	£214,000	£37,361	5.73	Strong affordability gains led by earnings growth outpacing house price increases
United Kingdom	£270,000	£39,039	6.92	Marked improvement driven by stronger national earnings growth

Source: ONS, 2026

Housing affordability across Cheshire showed a modest improvement during 2025, although pressures remain relative to regional and national benchmarks. 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 October 2025 average house price of £267,000 and a median annual salary of £37,198 (provisional data), the borough recorded an affordability ratio of 7.18, representing a slight

improvement on the 7.29 ratio reported in 2024. This slight improvement was driven primarily by stabilisation in house prices.

By contrast, affordability improvements across both the North West and the UK were more pronounced and were largely driven by stronger earnings growth. The North West and the UK experienced median salary increases of £2,185 and £1,600 respectively. As a result, housing affordability remains more constrained than across the North West but is closely comparable to the UK position.

Development Achievements & Plans

Chester

Out of the 183 net housing completions in Chester during 2024/25, the majority were attributed to the progression of **Kings Moat Garden Village** on Wrexham Road. Together, Redrow and Taylor Wimpey have constructed another 110 dwellings in 2024/5, taking the current total completed so far to 722 dwellings. With an expected final total of 1,269 homes, comprising a mix of two to four bed homes, Redrow will continue delivery over the next three years and Talyor Wimpey over five years. Alongside housing delivery, supporting infrastructure is also progressing, with permission granted for a new primary school and construction underway, set to open in September 2026, to serve the growing community.

The Deva Green housing development off Sealand Road, also continued delivery during the monitoring period, where Anwyll Homes completed a further 38 dwellings during the monitoring year which brought the total delivered to 87 units. The scheme will deliver 142 dwellings in total, comprising a mix of two to four bed houses. The remaining 55 homes are scheduled to be delivered over the next two monitoring years.

A pre-development agreement was secured with ION Developments to progress the next phase of the Chester Northgate regeneration, focused on the redevelopment of the former Forum Shopping Centre, Hamilton Place and former Gateway Theatre area. The scheme is expected to deliver a residential led, mixed use development of around 400 homes.

Northwich

The same ION Developments partnership also secured a pre-development agreement to advance the Weaver Square regeneration scheme in Northwich. The project is residential-led and is expected to deliver over 100 new homes, supported by enhanced public spaces and improved connectivity within the town centre.

Both pre-development agreements commit ION Developments to develop and produce a concept masterplan for each site and to develop business plans to help unlock external funding and support delivery. These pre-development works should be completed by the end of 2026. If all parties are satisfied with the outcome of the pre-development stage of the project, the Council can move forward to the signing of a development agreement, subject to Cabinet approval, where designs will be further developed, a planning application will be submitted, and delivery will commence.

This follows from the ongoing development of the land at Hargreaves Road. The first 42 net dwellings were completed in the monitoring period. The former Wade Works site is set to deliver 380 dwellings in total, with further phases expected to come forward over the next decade.

Winnington Place residential scheme reached completion of phase one, where the last nine dwellings delivered in 2024/25 brought the total to 124 dwellings. Alongside this, phase two continued



construction, with another 64 homes completed over the monitoring year. The 103 dwelling target for phase two is expected to be completed within the next year, 31 dwellings across the scheme are expected to be affordable.

The final phase five of the Weaver Park residential scheme neared completion over the monitoring period. With just eight dwellings left to be delivered out of the total of 258 for phase five, the scheme will soon reach the final total of 537 dwellings. The scheme comprises three and four bedroom homes including 94 affordable units.

Over at Gadbrook Park, there was prior approval in July for the conversion of Octagon House offices into 66 apartments. The scheme proposes a mix of one and two bedroom units. Although it responds to ongoing demand for smaller homes, the dwellings result in the loss of existing office floorspace within Northwich.

Winsford



Winsford's residential pipeline is characterised by large-scale, long term regeneration projects closely linked to town centre renewal objectives. The Winsford Station Quarter represents a major forthcoming residential scheme, with capacity for approximately 1,100 homes. The site constitutes

the final large housing allocation arising from the adopted 2014 Neighbourhood Plan. The housing scheme intends to bridge the physical and functional gap between the railway station and the waterfront in combination with broadening the town's housing offer.

Phase two began with construction on land adjacent to Wharton Road roundabout and, once complete, will bring total delivery of this site to 73 dwellings, with 46 of these allocated as affordable. Meanwhile, Spring Croft phase two opposite Clemonds Hey Police Headquarters, Oakmere Road reached completion with the housing total across both phases amounting to 479 dwellings.

Ellesmere Port



The **Ledsham Garden Village** scheme is set to provide 1,647 dwellings following approval of phases six to eleven in the previous year, with plans progressed for a new primary school to serve the development.

Part of the £13 million Levelling Up Fund regeneration scheme in the town centre is the creation of a proposed 180 homes. This has proceeded with the demolition of the former Ellesmere Port Council Offices at Civic Way along with multiple other buildings to make way for 'low carbon' homes. The Council aims to demolish empty or redundant buildings and then work with developers to build new first-time buyer of family homes.



Image: Protos, Ellesmere Port

Industrial

Industrial take up totalled 50,181 sqm across 31 transactions in 2025. While this appears substantially lower than the 115,862 sqm recorded in 2024, that figure was skewed by the single, extremely large-scale transaction of Link 674, Link Logistics Park in Ellesmere Port, which contributed over half of 2024's total take up. Excluding this deal from 2024, industrial market activity in 2025 aligns more closely with recent trends.

Looking at 'big box' market activity, Cheshire West and Chester recorded two deals sized over 4,645 sqm (50,000 sqft). The big box units transacted were the 9,981 sqm (107,435 sqft) Vortex 110 on Newbridge Road in Ellesmere Port and the 22,257 sqm (239,572 sqft) unit named The Quad, **Road Five at Winsford Industrial Estate** (the Borough's largest industrial deal of the year). Together, these two largest deals accounted for 70 percent of the borough's total industrial floorspace. The rent of £86/sqm (£8/sqft) was achieved for the unit in Ellesmere Port on a 5 year term. The Quad transaction completed as a freehold sale for £16,125,000 to Rubiks UK Propco Ltd. Both deals were handled by Legat Owen.

The distribution of the big box deals across Ellesmere Port and Winsford reflects the strategic strengths of each location within the regional logistics market. In Ellesmere Port, Vortex 110 on Newbridge Road sits within a long-standing industrial corridor with immediate access to the M53 and M56, placing it within reach of both Liverpool and Manchester, as well as the wider North West motorway network. At Winsford Industrial Estate, the unit on Road Five forms part of one of the borough's largest employment areas, where the scale of plots and estate layout can accommodate substantial footprint units and regular HGV movement, with access to the M6 and M56 via the A54.

Leading rents for small units about 100-200 sqm were about £135-150/sqm in 2025.

Table 7

Industrial Transactions by Area, 2024		
Area	Number of transactions	Total floorspace transacted (sqm)
Chester	15	5,541
Winsford	6	25,986
Ellesmere Port	6	17,549
Neston	1	70
Northwich	1	263
Frodsham	1	726
Malpas	1	46
Total	31	50,181

Source: BE Group, 2026

To ensure the continuity of quality industrial and logistics floorspace availability In Winsford, a new flagship industrial scheme progressed in October. Rula Developments secured planning approval and completed a pre-letting at the 30-acre **Winsford Gateway** site. The deal was agreed with Saint Group, which will take a bespoke headquarters building of 2,557 sqm (27,728 sqft) delivered on a build to suit basis. Planning consent was secured for two industrial units totalling 9,300 sqm (100,000 sqft), with a further speculative unit proposed across the site including larger industrial and smaller trade counter units. This follows Rula’s successful delivery of the 6,500 sqm roadside services scheme, including petrol station with retail amenities for The Kay Group, bringing together McDonald’s, Costa Coffee, Greggs, Subway and Londis, along with a new 5,600 sqm self-storage facility.



By floorspace, industrial activity was led by **Winsford** with 25,986 sqm of take up across six transactions, accounting over half (52 percent) of the total floorspace take up. The six transactions were all within **Winsford Industrial Estate, making it the cluster with the most industrial transactions across 2025**. For lease deals, rents at Winsford Industrial Estate averaged £90/sqm (£8.36/sqft), in line with the wider average. The year’s largest deal, the 22,257 sqm freehold sale of The Quad on Road Five, formed the majority of Winsford’s annual floorspace total. Excluding this transaction, remaining take up was modest compared to 14,797 sqm over 10 deals in 2024.

The previous year’s expansion of Roberts Bakery at Unity House, Winsford Industrial Estate accounted for over a third of Winsford’s floorspace total in 2024. In 2025, the 138-year-old bakery business was saved from closure after securing a change of ownership, safeguarding 433 jobs at the site and enabling operations to continue.

Unlike the previous year, **Chester led the borough in industrial deal volumes in 2025**, recording 15 deals comprising 5,541 sqm. Most transactions in Chester were smaller in scale, with 12 units sized below 500 sqm. **Sealand Industrial Estate** was an attractive location, accounting for six industrial deals across the year. This includes Dee View Business Park where four smaller units sized around 200-300 sqm were let throughout the year on three and five year leases, totalling 907 sqm. Average rent at Dee View was £90/sqm (£8.35/sqft), in line with the borough’s average rent. Also, the largest in deal in Chester occurred within Sealand. At Matrix Court, the 1,125 sqm Unit 1 was let to Padel Sheds on a 10 year lease for £88.89/sqm (£8.26/sqft). Elsewhere on Matrix Court, there was a substantial letting of the 9,644 sqm Unit 4 Matrix Court to PW Gates Distribution on a 10 year lease, however this is located just over the Chester boundary into Wales. The second largest deal at Sealand comprised the long leasehold sale of the 825 sqm Unit 8 Hartford Way for £475,000.

Deal volumes in **Ellesmere Port** halved year on year to six transactions. In terms of floorspace, the town’s singular 9,981sqm (107,435 sqft) big box deal did not compare to last year’s exceptional 62,646 sqm (674,316 sqft) letting at Link Logistics Park.

Activity in 2025 was instead concentrated within **Poole Hall Industrial Estate**, where units ranging from around 375 sqm–3,500 sqm accounted for half of Ellesmere Port's deal volume, totalling 4,975 sqm. Rents here averaged £71/sqm (£6.60/sqft) which is below the average, reflecting Ellesmere Port's role as a cost-effective industrial and logistics hub with M53 and M56 connectivity.

As noted in the earlier leisure chapter, both Chester and Ellesmere Port saw the introduction of padel facilities during 2025, which were captured within industrial transactions. At Vortex Business Park in Ellesmere Port, **Ignite Padel** Cheshire Oaks Ltd occupied a 1,569 sqm unit on a 15-year lease. As noted above, in Chester, **Padel Sheds** took a 1,125 sqm unit at Matrix Court, Sealand Industrial Estate on a 10-year lease. These lettings highlight the growing role of leisure operators within the industrial market, with mid-sized warehouse units increasingly

accommodating sport and fitness uses alongside traditional employment occupiers. The agreement of 10 and 15 year leases reflect the capital intensive nature of indoor court fit-out, with longer lease terms required to support upfront investment and ensure operational viability.

Only one transaction was recorded in **Northwich**, comprising a 263 sqm unit at Gadbrook Business Centre achieving £67 per sqm, handled by BA Commercial. This fell from six deals totalling 5,868 sqm in 2024. There were no deals at Winnington Business Park across 2025, the town's principal and only new build industrial estate. Rock Real Estate, a main agent for the development, confirmed that the estate was fully let, with the delivery of this stock in previous years largely absorbing demand within the local market. As a result, Northwich industrial activity in 2025 was scarce, limited by the low availability of units.

Image: Ignite Padel, Ellesmere Port





Industrial Parks with multiple transactions across 2025:

- **Sealand Industrial Estate (inc. Dee View Business Park), Chester:**
 - 6 deals
 - 2,857 sqm
 - Occupiers span manufacturing, leisure and technical services, including Prime Glazing Ltd, Padel Sheds, Surprise Adventure and 3D Metrology Solutions
- **Winsford Industrial Estate, Winsford:**
 - 6 deals (inc. Premier Park & Navigation Park)
 - 25,986 sqm
 - Activity included manufacturing, engineering and distribution occupiers such as BHS Corrugated, Shadow Foam and Stone Hardy Ltd, alongside the major freehold acquisition by Rubiks UK Propco Ltd
- **Poole Hall Industrial Estate, Ellesmere Port:**
 - 3 deals
 - 4,975 sqm
 - Occupiers included AM Transport and ML Engineering & Site Installations Ltd.

Looking ahead, the **Stoford industrial scheme** off the A556 in Northwich represents one of the largest current planning applications in the borough. In the previous year, Stoford acquired 82 acres of allocated employment land adjacent Gadbrook Park in Rudheath. A Development Brief was approved in November 2025 by the Council to inform the comprehensive development of the site. Local Plan policy N4(F) allocates the site for 19 hectares of employment development on the site.

Stoford are proposing a £220 million scheme of over 100,000 sqm of employment floorspace that could be capable of delivering big box industrial and logistics units of a range of sizes, which is subject to planning approval. Whilst the outcome of the planning application is unknown at this stage, the delivery of the employment allocated is expected to form a key component of the future employment land pipeline, supporting large scale industrial and logistics demand in a highly accessible corridor location.

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Quad, Road Five, Winsford Industrial Estate, Winsford	Undisclosed	Rubiks UK Propco Ltd	22,257	16,125,000	Sale	Legat Owen
Vortex 110 Newbridge Road, Ellesmere Port	Private Individual	Trade Outlet	9,981	86.16	5 Years	Legat Owen
Unit 2, Olympic Park, Poole Hall Industrial Estate, Ellesmere Port	Mileway	ML engineering & Site Installations Ltd	3,499	60.67	10 years	Legat Owen
Unit B2, Vortex Business Park, Ellesmere Port	Private Individual	Ignite Padel Cheshire Oakes Ltd	1,569	99.56	15 years	Legat Owen
Unit 1 Matrix Court, Sovereign Way, Sealand Industrial Estate, Chester	Columbia Threadneedle	Padel Sheds	1,125	88.89	10 years	Legat Owen
Units 2, 4 & 5 Poole Hall Industrial Estate, Ellesmere Port	Mileway	AM Transport	1,098	78.00	5 years	Legat Owen
Former Jewson, 142 Christleton Road, Boughton, Chester	Landview	Howden Joinery Properties Ltd	1,094	105.19	14 years	Legat Owen
Unit 1 Winsford Industrial Estate, Winsford	Undisclosed	Undisclosed	1,061	70.67	Undisclosed	BA Commercial
Unit 12, Stanney Mill Industrial Park, Ellesmere Port	Private Individual	AW Coaching in the Community CIC	1,024	93.75	Undisclosed	Legat Owen
Unit 11, Road One, Winsford Industrial Estate, Winsford	Undisclosed	Shadow Foam	1,001	74.93	5 Years	Legat Owen
Unit 8, Hartford Way, Sealand Industrial Estate, Chester	BPC Investments Ltd	Private	825	475,000	Long Leasehold	Bolton Birch

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Unit 5, Premier Park, Road One, Winsford Industrial Estate, Winsford	Merseyside Pension Fund	BHS Corrugated	753	91.45	5 years	Legat Owen
Former RTC, Newton Hallows, Frodsham	Private	Gravitas International	726	41.31	5 Years	Kenney Moore
Unit 1 Weaver Place, Road 3, Winsford Industrial Estate, Winsford	Undisclosed	Stone Hardy Ltd	491	122.18	15 years	Legat Owen
Unit 10, Central Trading Estate, Chester	Mileway	Private Individual	436	79.81	10 years	Legat Owen
Unit 6 Navigation Park, Road One, Winsford Industrial Estate, Winsford	James Hall Developments Ltd	Pearl Scan Holdings Ltd	423	620,000	Sale	Legat Owen
Unit 12, Poole Hall Industrial Estate, Ellesmere Port	Mileway	Private Individual	378	74.07	5 years	Legat Owen
Glebe Farm, Grosvenors, Chester Road, Aldford, Chester	Eaton Estates	Recclesia	321	57.60	10 years	Legat Owen
Unit 12, Dee View Business Park, Chester	Cheshire West and Chester Council	3D Metrology Solutions Ltd	288	85.07	5 years	Legat Owen
Unit 1, 7A Winsford Way, Chester	Private Individual	Gary Shone	265	49.06	Undisclosed	Legat Owen
Units 5-6, Dalby Court, Gadbrook Business Centre, Northwich	Undisclosed	Undisclosed	263	66.64	Undisclosed	BA Commercial

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Unit 14, Vantage Point, Bumpers Lane, Chester	Private Individual	Angling Direct PLC	243	121.29	10 years	Legat Owen
Unit 9, Dee View Business Park, Chester	Cheshire West and Chester Council	Prime Glazing Ltd	223	91.97	3 years	Legat Owen
Unit 7, Dee View Business Park, Chester	Cheshire West and Chester Council	Surprise Adventure Ltd	199	90.57	3 years	Legat Owen
Unit 3, Dee View Business Park, Chester	Cheshire West and Chester Council	Newgate Simms	197	92.36	5 years	Legat Owen
Unit 3b, Cestrian Court, Chester	Private Individual	Dee Archaeological Services	138	136.49	5 years	Legat Owen
Unit 4b, Church Farm Court, Chester	Private Individual	Graystons Solicitors Ltd	105	149.02	Undisclosed	Legat Owen
Clayhill Industrial Estate, Liverpool Road, Neston	Undisclosed	Undisclosed	70	107.64	5 Years	Hitchcock Wright & Partners
Units 4A, Church Farm Court, Chester	Private Individual	IGM Consultants (Chester) Ltd	62	149.10	Undisclosed	Legat Owen
Unit 2, Hampton Heath, Malpas	Mileway	Little Padron Ltd	46	163.07	Undisclosed	Legat Owen
Unit 12, New Russia Hall, Tattenhall, Chester	Bolesworth Estate	Ryan Lee	20	107.61	3 years	Legat Owen

Office

In total, 85 transactions were recorded across Cheshire West and Chester over 2025, equating to 13,883 sqm of transacted floorspace. This represents a 32 percent increase in deals volumes compared with 2024, alongside a 15 percent increase in total floorspace from 12,066 sqm. The stronger uplift in transaction numbers relative to floorspace reflects a reduction in average office size year on year.

The widening gap between deal growth and floorspace growth is consistent with a continued concentration of activity within the smaller unit market. Of the 85 transactions recorded in 2025, 65 transactions were units below 200 sqm, accounting for 4,576 sqm of take up. Therefore, in deals terms, office market growth over 2025 was primarily driven by higher churn in smaller, more flexible accommodation, reinforcing the established depth of demand at this end of the market.

The prime rent of the year for leased offices with the 100-200 sqm range reached £259/sqm (£24.09/sqft). This is an uplift of £37/sqm, equivalent to a 16 percent increase on the previous year. Rent across all sized units averaged £180.03/sqm (£16.73/sqft).

In contrast, the larger office segment (above 200 sqm) accounted for 9,307 sqm of the floorspace total spread across 20 deals. The number of offices transacted in this bracket remained almost unchanged from 2024 (21 deals), confirming stable demand for larger office space within the borough. 56 of the 73 leasehold deals have recorded lease lengths, with shorter lease commitments dominating the market. 12-month lease terms were the most common, with 20 deals (35 percent) agreed on this length. As expected, these leases were concentrated in very small units less than 100 sqm with the majority below 40 sqm. Although, as with the previous year, around half of recorded lease lengths were for 3 years or 5 years (20 percent and 24 percent respectively). The market continued to support both flexible, small-scale occupation and longer-term demand, occupier behaviour which was consistent with the previous year.

Table 8

Office Transactions by Area, 2025		
Area	Number of transactions	Total floorspace (sqm)
Chester (inc. Dodington, Pulford & Tattenhall)	74	11,044
Ellesmere Port	6	1,728
Neston	1	31
Northwich	1	511
Tarporley	1	162
Winsford	2	407
Total	85	13,883

Source: BE Group, 2026

In 2025, **Chester continued to strengthen** as the borough's principal office market. Chester recorded 11,044 sqm over 74 deals, making up 87 percent of the deals volume and 80 percent of total floorspace. The city's share of the market grew by 17 percent from 2024 as floorspace take up increased by 50 percent. This growth outpaced the wider Cheshire West market considerably, where activity outside the city declined in Winsford, Tarporley and Eccleston. Average rent in Chester sat at £184/sqm (£17/sqft), heavily dictating the overall average.

The city centre continued to provide a key location for office occupation, with deals recorded across the city centre, including clusters at Watergate Street, Northgate Street, Nicholas Street and the Steam Mill. **Watergate Street** saw the most activity, with eight deals completed during the year. All but one of these units measured below 40 sqm and were agreed on one-year terms, all handled by Bolton Birch. This reflects the prevailing availability and appetite within Chester city centre for small, flexible office space.

In terms of additional office floorspace, there was a change of use at 29 Grosvenor Street where a vacant restaurant was converted into three self-contained office units. This provided 642 sqm of new office space in Chester. The smallest of these new units (65 sqm) was leased at a rent of £204/sqm (18.93/sqft), a rent higher than Chester's average and considerably higher than the borough wide average.



Image: Chester





In November, District Estate announced the start of the **major transformation of Nicholas House**, a prominent office building in Chester city centre, with the aim of delivering a new benchmark for Grade A office space in the city. The scheme will provide around 1,860 sqm (20,000 sqft) of high-quality office accommodation through the extensive refurbishment of the existing vacant unit.

Outside of the city centre, Chester Business Park recorded eight deals in 2025, totalling 1,726 sqm. The largest unit transacted was 516 sqm to Vital Power Ltd on a 10 year lease for £140/sqm (£12.96/sqft).

Office activity in **Winsford** was very limited in 2025. Just two deals were recorded: a 345 sqm unit at Astbury House on a seven year lease for £139/sqm (£12.94/sqft), and a 62 sqm unit at Wharton Park House on a one year lease, both handled by Legat Owen. This was a sharp reduction from 2024, when 10 office deals were completed. However, the lower levels of transactions in 2025 reflects limited, good

quality available stock in the local market. Wharton Park House, the town's principal office location, was fully let after the 62 sqm deal and the eight lettings made in the previous year, and there was very limited alternative accommodation available in Winsford.

Ellesmere Port was the only area outside Chester to demonstrate continuity of office market activity in 2025. Occupier demand was directed towards established stock along **Inward Way**, where four out of the town's six transactions were completed. This comprised two leasehold lettings at the Technology Centre and two freehold sales at Rossmore Business Village, together totalling 520 sqm. All lettings were handled by Legat Owen. Elsewhere in Ellesmere Port, the biggest leasehold deal of the year took place, the 1,064 sqm Custom House on Merseyton Road was taken by the NHS on a 10 year lease for £92/sqm (£8.52/sqft). Rents in the area averaged at £130.80/sqm (£12.15/sqft)) which is slightly lower than the Borough average, though is skewed by the large NHS letting.

Office clusters with multiple transactions:

- **Bell Meadow Business Park, Pulford, Chester**
4 deals, 331 sqm
- **Chester Business Park**
8 deals, 1,726 sqm
- **Nicholas Street, Chester**
4 deals, 159 sqm
- **Northgate Street, Chester**
5 deals, 877 sqm
- **Rossmore Business Village, Ellesmere Port**
2 deals, 408 sqm
- **Sedan House, Chester**
4 deals, 83 sqm
- **The Steam Mill, Chester**
3 deals, 257 sqm
- **The Technology Centre, Ellesmere Port**
2 deals, 112 sqm
- **Watergate Street, Chester**
8 deals, 230 sqm

The office offer in **Northwich** decreased through 2025 due to the loss of office space at Gadbrook Park to other uses, totalling 3,057sqm; these included Osborne Court (2,300 sqm) to the creation of an independent One School global use, and Sherwood House (757 sqm) to an independent special school. There was a further approval at Octagon House in July 2025 for 66 apartments, which when implemented would result in a further loss of 5,750 sqm. Together these proposals could result in around 8807sqm of office floorspace being lost at Gadbrook Park.

The Council will continue to monitor any losses of office floorspace at Gadbrook Park. It is considering the supporting evidence and justification for an Article 4 Direction, which would require planning permission for changes of use that would otherwise be permitted development. This would allow the Council to assess proposals on a case-by-case basis and better protect key employment areas from further loss of office space. This is particularly important given growing evidence of a return to office-based working following the pandemic, with occupiers increasingly recognising the benefits of in-person collaboration, productivity and workforce development, especially among younger employees.

Image: Proposed Stoford industrial scheme off the A556 in Northwich



Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Custom House, Merseyton Road, Ellesmere Port	Mewbourne Properties	NHS	1064	91.67	10 Years	Legat Owen
Raymond House, Raymond Street, Chester	Citipoint Ltd	231 Developments Ltd	982	75,000	Sale	Kenney Moore
Second Floor Office, Knights Court, Weaver Street, Chester, CH1 2BQ	FT Pattern Properties	DTM Legal	617	187.41	10 Years	Legat Owen
67 Liverpool Road, Chester	Private Individual	University of Chester	553	850,000	Sale	Legat Owen
SF Merchants House, Crook St, Chester	Undisclosed	Undisclosed	548	129.19	Undisclosed	BA Commercial
Unit 3, Office Village, Chester Business Park, Chester	Highway Star Ltd	Vital Power Ltd	516	139.53	10 Years	Bolton Birch
2 & 4 Upper Northgate Street, Chester	Undisclosed	Undisclosed	512	717,750	Sale	BA Commercial
Century House, Gadbrook Park, Northwich	Undisclosed	Undisclosed	511	117.47	Undisclosed	BA Commercial
The Foundation Chester Business Park, Chester	Private Individual	Xeindin NW Ltd	492	216.22	10 Years	Legat Owen
Former Natwest Building, Union Street, Chester	Cheshire West & Chester Council	Steve Pendergast	483	950,000	Sale	Legat Owen
Lea Hall Farm, Aldford, Chester	Eaton Estates	Hickory's	457	Undisclosed	Undisclosed	Legat Owen

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Former St Andrews Church, Handbridge, Chester	Citipoint Ltd	Private purchaser	387	245,000	Sale	Kenney Moore
Astbury House, Bradford Road, Winsford	Private Individual	Impact North West	345	139.23	7 years	Legat Owen
Unit 2, The Oaks, Stanney Mill Lane, Little Stanney, Chester	Precision Facades	Johnstone Howell	288	121.64	5 years	Legat Owen
Suite 1B Honeycomb East, Chester Business Park, Chester	Undisclosed	Amore Social Care Ltd	279	78.85	Undisclosed	BA Commercial
Unit 7/8 Rossmore Business Village, Inward Way, Ellesmere Port	Cyberian	Edsential	279	275,000	Sale	Legat Owen
Ground Floor, Centurion House, 77 Northgate Street, Chester	Undisclosed	Undisclosed	260	Undisclosed	Undisclosed	Undisclosed
5 Chowley Oak Business Park, Chowley Oak Lane, Tattenhall, Chester	Bolesworth Estate	NFU Mutual	251	161.46	5 years	Legat Owen
171 First Floor, Boughton, Chester	C Brewer & Sons Ltd	The Bike Factory	251	79.74	5 Years	Legat Owen
9 Hunter Street, Chester	Private	Owner Occupier	232	Undisclosed	Sale	Legat Owen
11 Victoria Road, Chester	Private	Regency Organics Ltd	194	91.49	5 Years	Bolton Birch
Suite 2 The Coachworks, Chester	Undisclosed	Undisclosed	183	237.52	Undisclosed	BA Commercial

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
3A Cestrian Court, Lightfoot Street, Chester	Cestrian Properties	Emeral Therapy Services	169	109.57	10 years	Legat Owen
102 Whitby Road, Chester	Private Individual	THI/Skye Homes	168	204,000	Sale	Legat Owen
Oak Barn, Tarporley	Stuart Roberts	Oak Experts	162	135.92	5 years	Legat Owen
2 St Johns Court, Vicars Lane, Chester	Eaton Estates	Baker Risk	152	150.67	5 years	Legat Owen
Telfords Quay First Floor, South Pier Road, Ellesmere Port	British Sub Aqua Club	Turner Associates	144	129.17	3 years	Legat Owen
Suite A2 1st Floor, Linenhall House, Chester	Brian Metcalf Discretionary Settlement	Cheshire Community Action	141	75.28	5 Years	Bolton Birch
Honeycomb East 1B Ground Floor, Chester Business Park, Chester	Palladium Property	Amore Healthcare	132	167.28	5 Years	Legat Owen
Dodleston House, First floor right, Bell Meadow Business Park, Pulford, Chester	Undisclosed	Undisclosed	131	Undisclosed	Sale	BA Commercial
Unit 5, Rossmore Business Village, Inward Way, Ellesmere Port	360 Systems	Retrospect Energy	129	160,000	Sale	Legat Owen
Suite C2A The Quadrant, Chester	Hapgood Developments Ltd	Car Loan First	126	124.22	5 Years	Bolton Birch

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Honeycomb North-Front, Chester Business Park, Chester	Palladium Property	TBC Recruitment	116	259.29	5 Years	Legat Owen
1 Kings Buildings, King Street, Chester	Veracity Marketing	Maley Digital	113	217.42	5 Years	Legat Owen
Goss Chambers, Chester	Undisclosed	Undisclosed	108	111.2	Undisclosed	BA Commercial
First Floor Honeycomb West, Chester Business Park, Chester	Undisclosed	Love Mortgages Ltd	105	Undisclosed	Undisclosed	Undisclosed
York House, 1 York Street, Chester	Private Individual	Undisclosed	104	180,000	Sale	Legat Owen
Unit 2 Old School Building, High Street, Tattenhall, Chester	Bolesworth Estate	Undisclosed	100	130.43	5 Years	Legat Owen
Dodleston house, 1st Floor Right Bell Meadow Business Park, Pulford, Chester	PPLS	Rapid News Publications Ltd	99	188.33	3 years	Bolton Birch
8 Commonhall Street, Chester, CH1 2BJ	Private Individual	Philip Jeffrey Skin	98	129.17	3 Years	Legat Owen
Offices 4, 7, 11 & 14 12 Nicholas Street, Chester	Private	Private	93	161.29	1 Year	Bolton Birch
The Steam Mill, Chester	Columbia Threadneedle	Simplexity Travel	91	193.75	3 years	Legat Owen
The Steam Mill, Fourth Floor, Chester	Columbia Threadneedle	Captivate Social UK Ltd	90	188.17	3 Years	Legat Owen

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
4 St Johns Court, Grosvenors, Vicar's Lane, Chester	Eaton Estates	Mercury Search Selection	76	161.46	5 years	Legat Owen
The Steam Mill, Ground Floor, Chester	Columbia Threadneedle	Exchequer Solutions	76	186.59	Undisclosed	Legat Owen
Heritage Place, Grosvenor Court, 1-2 Foregate Street, Chester	Chester Property Holdings	Stellar Heavy Industries	74	161.46	3 years	Legat Owen
Honeycomb West E1 First Floor, Chester Business Park, Chester	Palladium Property	Love Mortgages	70	185.02	5 years	Legat Owen
6 St Johns Court, Grosvenors, Vicar's Lane, Chester	Eaton Estates	Bloc Building Consultancy Ltd	66	177.27	3 Years	Legat Owen
29 Grosvenor Street, Chester	Undisclosed	Undisclosed	65	230.77	Undisclosed	BA Commercial
Ground Floor Suite, Egerton Mill, Chester	Global Media Group Ltd	Kell & Ko Ltd	64	156.25	4 years	Bolton Birch
Suite 12 The Meadows, Church Road, Dodleston, Chester	Undisclosed	Undisclosed	62	140.19	Undisclosed	BA Commercial
Wharton Park House, Nat Lane, Winsford	5 Cooper Holdings Ltd	Evolving Care	62	Undisclosed	1 Year	Legat Owen
The Old Coach House At The Grange, Hoole Road, Chester	DGM Investments Properties Ltd	Wattle & Daub Architects	60	216.67	3 Years	Bolton Birch

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Part First Floor, 8-9 Grosvenor Street, Chester	Undisclosed	Undisclosed	58	171.53	Undisclosed	Undisclosed
The Technology Centre, Room 4, Inward Way, Ellesmere Port	The Eric Wright Group	Richmond Training	58	150.74	3 years	Legat Owen
Shiftworks, Upper Northgate Street, Chester, CH1 4EE	Shiftworks	Venum	56	215.28	1 Year	Legat Owen
Bretton House, First Floor Bell Meadow Business Park, Pulford, Chester	PPLS	Pulford Medical Centre	54	189.44	3 Years	Bolton Birch
The Technology Centre, Room 3, Inward Way, Ellesmere Port	The Eric Wright Group	Noble Care Alliances	54	151.63	10 years	Legat Owen
Waverton House, Bell Meadow Business Park, Pulford, Chester	PPLS	AOKE	47	188.37	Undisclosed	Legat Owen
2nd Floor Suite, Sedan House, Stanley Place, Chester	HS & JE Jones Ltd	Mulberry Travel	43	244.19	1 Year	Bolton Birch
T1 & T2 104 Watergate Street, Chester	Private	LMK Treatments & Training Ltd	42	190.48	3 Years	Bolton Birch
Unit 8/9 Church Farm Court, Capenhurst Lane, Chester	Private Individual	Crownshield Security Services	42	200.57	5 years	Legat Owen
FF Office, Suite 2, 9 Lower Bridge Street, Chester	Undisclosed	Undisclosed	39	Undisclosed	Undisclosed	BA Commercial

Property	Vendor/ Landlord	Tenant/ Purchaser	Size (Sq M)	Rent/Price (per Sq M)	Lease Term (Years)	Agent(s)
Room 1, 2nd Floor, Watergate House, Chester	ADT Property Holdings Ltd	True Potential Solutions	39	171.79	1 year	Bolton Birch
Room 15, 1st Floor, Watergate House, Chester	ADT Property Holdings Ltd	Private	38	242.11	1 year	Bolton Birch
Room 12, 1st Floor Watergate House, Chester	ADT Property Holdings Ltd	Private	33	240	1 year	Bolton Birch
Tower Building, 2 Parkgate Road, Neston	Private	Hallmark Estates Group Ltd	31	100,000	Sale	Bolton Birch
Room 4, 2nd Floor Rear, 92 Northgate Street, Chester	Private	Alphastor Ltd	29	189.48	1 year	Bolton Birch
Office 15, Attic, 22 Nicholas Street, Chester	Green Door Offices (Chester) Ltd	Private	25	162	1 year	Bolton Birch
Room 6, 50 Watergate Street, Chester	Private	Naturally Ross Ltd	23	185.65	1 year	Bolton Birch
The Barns Lane End Farm, Kelsall Road, Chester	Private Individual	Cleanse Commercai Ltd	23	26.32	6 months	Legat Owen
Room 4, 50 Watergate Street, Chester	JA & PN Bartlett	Richard Hickman	22	189.32	1 Year	Bolton Birch
Room 9, 2nd Floor, 20 Nicholas Street, Chester	JA & PN Bartlett	Private	22	217.27	1 Year	Bolton Birch
Room S3, 104 Watergate Street, Chester	Private	Madebyswish Ltd	19	265.26	1 Year	Bolton Birch

Investment

During 2025 the UK commercial property investment market showed signs of increased activity, partly brought on by stabilisation of interest rates and forecasts of further rate reductions and partly through increasing occupier demand leading to rental growth.

Table 9

Investment Deals by Use Type		
Type	Number of transactions	Investment Spend (£M)
Office	1	0.48
Industrial	6	28.42 (exc. Thornton)
Retail	2	0.65
Other	2	0.49
Total	11	30.4

CBRE in its annual review of the market reported an 11 percent increase in activity with healthy activity across healthcare, living, office and industrial sectors. Retail also saw improved investment activity as high streets began to fight back against online shopping with consumers looking to reconnect with the shopping experience. As a result, rents have started to creep up again.

As well as volume and rental growth, yield levels are a key market indicator, and according to Savills in its end of year review, yields stabilised across sectors with some seeing falls by the end of the year.

A further factor underpinning the market was the level of overseas investment into the UK property market with US and other international funds diversifying across different sectors.





Image: Stanlow, Ellesmere Port

Whilst much of the fund activity is currently directed to the capital and the larger cities, the trickle-down effect hopefully will see that confidence spread. Investment activity has been seen in Cheshire West and Chester in 2025 with 10 transactions totalling around £30 million were recorded during the year. Add to that the undisclosed figure for the purchase of **Thornton Science Park** by Essar Energy Transition and which also completed during 2025.

The strongest sector was industrial which saw a mix of UK and international investors buy up six different investments. The largest saw European investment fund, Iroko, which bought a group of industrial units at Matrix Court Chester for £10.73 million producing a rent of £833,500 and a yield of 7.28 per cent.

Winsford saw the most industrial investment, with three transactions reflecting yields of sub eight percent. The largest saw One Point Investments paying Pitalia Real Estate £16 million and a yield of 7.41 per cent, for four units at **Road Five** in Winsford, with occupiers including Henkel and Roberts Bakery.

Reported retail deals were few and far between, but activity was seen in Chester and Tarporley. The single office sale reported saw local Chester investment company Wastdale Investments Ltd purchase **Talbot House** in Chester reflecting a yield of 8.1 percent.

Industrial

Property	Vendor	Purchaser	Size (Sq M)	Price (£M)	Tenant(s)	Income (£/pa)	Net Initial Yield (%)
Thornton Science Park, Pool Lane, Ellesmere Port	University of Chester	Essar Energy Transition	267,000	Undisclosed	Multi	Undisclosed	Undisclosed
Quad, Road Five, Winsford Industrial Estate, Winsford	Pitalia Real Estate	One Point Investments	22,257	16	Multi	1,265,856	7.41
Matrix Court, Sealand Road, Chester	Mileway	Iroko	12,576	10.723	Alliance Automotive, Stokers, PW Gates	833,500	7.28
IDE, Winnington Avenue, Winnington, Northwich	Malou Investments	Hamilton Heath Estates	2,858	Undisclosed	Industrial Door Engineering	136,055	Undisclosed
Unit 1 Road One, Winsford	Undisclosed	Armstrong Brooks	2,202	1.08	Secondtek	90,000	7.87
Unit 6 Navigation Park, Road One, Winsford	James Hall Developments Limited	Pearl Scan Holdings Ltd	423	0.62	GAP Limited	42,500	6.74

Office

Property	Vendor	Purchaser	Size (Sq M)	Price (£M)	Tenant(s)	Income (£/pa)	Net Initial Yield (%)
Talbot House, Albion Street, Chester	Private Individual	Wastdale Investments Ltd	259	0.48	Multi	40,657	8.1

Retail

Property	Vendor	Purchaser	Size (Sq M)	Price (£M)	Tenant(s)	Income (£/pa)	Net Initial Yield (%)
65 Garden Lane, Chester	Undisclosed	Undisclosed	74	0.2877	Undisclosed	13,552	4.71
60 High Street, Tarporley	Undisclosed	Undisclosed	50	0.365	Tarporley Hair Boutique	15,000	3.9

Other

Property	Vendor	Purchaser	Size (Sq M)	Price (£M)	Property Type	Tenant(s)	Income (£/pa)	Net Initial Yield (%)
Canal Street, Chester	Canal & River Trust	Douglas Williams & Co Electronics Ltd	1,619	0.49	Car Park	iPark Smart Ltd	45,833	8.6
28 Bridge St & 26 Bridge St Row & Commonhall Apartments, Chester	Private	Private	473	Undisclosed	Mixed Use	Multi	93,500	Undisclosed

Looking Forward

As seen throughout this report, there is substantial activity in the development pipeline in the borough, including ongoing town centre regenerations, businesses coming to the borough and developments with planning permission or currently underway.

Blacon South and **Ellesmere Port Rossmore** were confirmed in September as two of the 75 beneficiaries of the Government's £5 billion 'Pride in Place' programme, a long-term initiative aimed at



supporting regeneration in of the country's most disadvantaged neighbourhoods. Under the programme, **each area will receive £2 million per year for a decade**, providing sustained investment rather than short term funding. The selection of both areas reflects their relative deprivation profile as parts of Blacon South and Rossmore fall within the most deprived deciles nationally, with several lower super output areas ranked in deciles one and two. As part of the programme, Neighbourhood Boards will be established locally to shape investment priorities and oversee delivery.

Elsewhere, a number of schemes are expected to reach completion in 2026, supporting further advancement of the Borough. As part of the Weaver Square project, a new **Northwich Market** is being delivered in Barons Quay. This is expected to open in summer 2026.



Town centre improvements in Ellesmere Port, Winsford, Northwich, Winsford and Frodsham are progressing to reinvigorate the borough's key centres and improve vitality. Where recent improvements have already been completed, there has been noticeable increases in footfall.



The Council has recently exchanged contracts with Rothstone Estates Ltd for land at Leicester Street, Northwich. Rothstone has entered into an Agreement for Lease with **Marks and Spencer** for a 1,700 sqm (18,000 sqft) **M&S Food store** on the town centre site. The disposal is subject to planning.

The establishment of the Cheshire and Warrington Combined Authority marks a significant step forward in the devolution of powers to the sub-region from Whitehall, strengthening local decision making. Cheshire West and Chester will continue to work alongside Cheshire East and Warrington Councils as well as the UK Government as the new authority takes forward its priorities, with mayoral elections scheduled for May 2027. The Combined Authority Shadow Board approved a 20 year Sustainable and Inclusive Economic Strategy, establishing the platform for a long-term strategic framework for economic growth, investment and place development across the sub-region to 2045.



Acknowledgements

Cheshire West and Chester Council and BE Group would like to acknowledge and thank the following organisations for their inputs into this document.

- Avison Young
- BA Commercial
- Bolton Birch
- CBRE
- Cheshire Oaks
- Chester Zoo
- Eaton Estates
- Edwards Property Consultants
- Fisher German
- Kenney Moore
- Lambert Smith Hampton
- Legat Owen
- Mason Partners
- OBI
- Rock Real Estate
- University of Chester

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