



Employment Land Audit 2018/19

Aberdeen City Council
Aberdeenshire Council

Employment Land Audit 2018/19

A joint publication by Aberdeen City Council and Aberdeenshire Council

Executive Summary	1
1. Introduction	
1.1 Purpose of Audit	5
2. Background	
2.1 Scotland and North East Scotland Economic Strategies and Policies	6
2.2 Aberdeen City and Shire Strategic Development Plan	7
2.3 Aberdeen City and Aberdeenshire Local Development Plans	8
2.4 Employment Land Monitoring Arrangements	9
3. Employment Land Audit 2018/19	
3.1 Preparation of Audit	10
3.2 Employment Land Supply	10
3.3 Established Employment Land Supply	11
3.4 Constrained Employment Land Supply	12
3.5 Marketable Employment Land Supply	13
3.6 Immediately Available Employment Land Supply	14
3.7 Under Construction	14
3.8 Employment Land Supply Summary	15
4. Analysis of Trends	
4.1 Employment Land Take-Up and Market Activity	16
4.2 Office Space – Market Activity	16
4.3 Industrial Space – Market Activity	17
4.4 Trends in Employment Land	18
Appendix 1 Glossary of Terms	
Appendix 2 Employment Land Supply in Aberdeen and map of Aberdeen City Industrial Estates	
Appendix 3 Employment Land Supply in Aberdeenshire	

Appendix 4 Aberdeenshire: Strategic Growth Areas and Regeneration Priority Areas

Appendix 5 Historical Development Rates in Aberdeen City & Aberdeenshire and detailed description of 2018/19 completions

December 2019



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Executive Summary

Purpose and Background

The Aberdeen City and Shire Employment Land Audit provides up-to-date and accurate information on the supply and availability of employment land in the North-East of Scotland. The audit has been produced by officials of Aberdeen City and Aberdeenshire Councils and the Strategic Development Planning Authority (SDPA). The 2018/19 Audit has a base date of 1st April 2019. You can also view the Employment Land Audit document on the councils' websites:

www.aberdeencity.gov.uk/localdevelopmentplan

www.aberdeenshire.gov.uk/council-and-democracy/statistics/economy

Established Supply

Between April 2018 and April 2019 the established land supply in Aberdeen City decreased by 4% to 274ha. Over the past year one site which was under construction has now been completed. This is approximately 12ha at The Event Complex Aberdeen (TECA) which replaces the Aberdeen Exhibition and Conference Centre (AECC), also known as Site OP19 in the Local Development Plan. Aberdeenshire has seen a small decrease of 5ha resulting in a new established supply total of 548ha. Over the past year, 3.4ha have been built out and a further 1.9ha are under construction.

Constrained Supply

There has been no change in the constrained supply for Aberdeen City between April 2018 and April 2019, remaining at 64ha for a fourth year, which equates to 22% of its established supply. In Aberdeenshire, the constrained supply has increased by 9% over the same period to 267ha, meaning that almost half (49%) of the established supply in the Shire is constrained.

In general, the relatively high amount of constrained supply in both authorities can be explained by the fact that some of the larger Local Development Plan (LDP) allocations with more complex infrastructure requirements are realistically expected to come forward in the medium rather than short term.

Marketable Supply

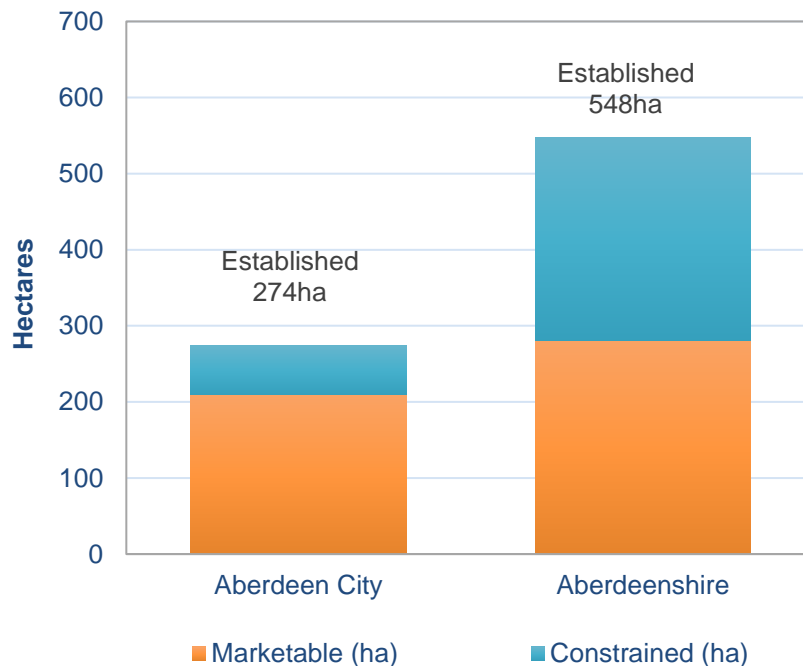
The marketable land supply in Aberdeen City has decreased by 6% from April 2018 to April 2019 to 210ha as the first phase of the OP19 Rowett North site has been built out, of which 52ha are classed as immediately available. In Aberdeenshire, there was a net decrease of 9% in the marketable supply over the year to 281ha, of which 64ha are classed as immediately available.

The Strategic Development Plan requirements for employment land supply are as follows:

- 60ha of marketable land available in Aberdeen City
- 60ha of marketable land available in the Strategic Growth Areas of Aberdeenshire
- At least 20ha of this marketable land to be suitable for high quality business use/company headquarters

The targets for the supply of marketable employment land in both Aberdeen City and Aberdeenshire continue to be significantly exceeded and the overall employment land supply provision is generous. Over 20ha of the total marketable land available is considered suitable for high quality business use and/or company headquarters. The Proposed Strategic Development Plan has been out for consultation, in which the employment land supply targets remain unchanged. The Proposed Plan is still undergoing Examination by the Planning and Environmental Appeals Division (DPEA) of the Scottish Government at the time of writing.

Figure 1: Employment Land Supply Aberdeen City and Shire 2018/19

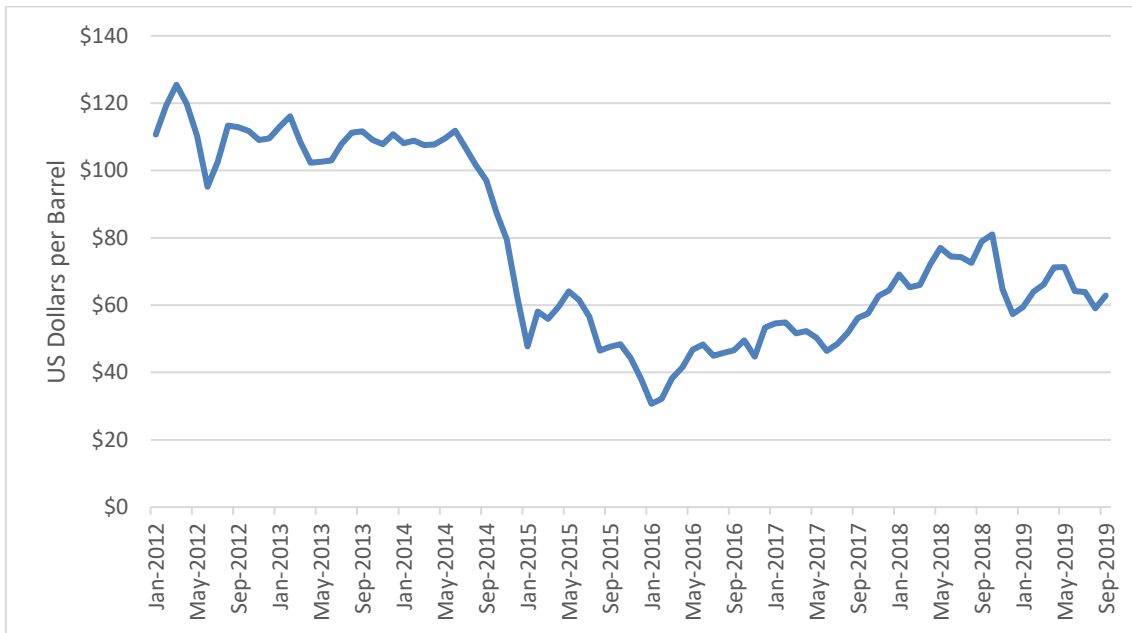


Market Activity ¹

Figure 2 below shows the dramatic fall in the oil price towards the end of 2014 from over \$100 per barrel to below \$40 per barrel in early 2016. Over the 9 months from January to September 2019 the price has averaged \$65 per barrel and it is anticipated that ongoing price stability in the region of \$60 - \$65 per barrel will continue in 2020. Oil price stability, together with the vast reduction in operating costs achieved over the last 3-4 years, may now allow companies to plan for the future. Whether this could involve new property requirements which would in turn filter through to an increased take up rate of employment land remains to be seen.

¹ Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2019 ; Ryden 84th Scottish Property Review April 2019; Ryden 83rd Scottish Property Review October 2018, CBRE Marketview Aberdeen Office H2 2018

Figure 2: Europe Brent Crude Price January 2012 – September 2019



Source: eia.gov (US Energy Information Administration)

Looking back over 2018/19, there has been a significant fall in the take up of employment land in Aberdeenshire, despite the recent improved stability in the oil price. Development has taken place on around 3ha of employment land in 2018/19 compared to a 10 year average for Aberdeenshire of around 14ha per annum. There has also been a continued fall in the rate of development in the City over 2018/19 with no new developments commencing in that period. The first phase of the new mixed use development at OP19 Rowett North, covering 12ha, has completed and is now in use. The second phase of the site, which is to include office space, has yet to commence. Several of the previously completed sites in the City continue to remain vacant despite reported confidence returning to the oil and gas industry.

Overall the supply of both office and industrial space has continued to exceed demand, although a high proportion comprises of older stock and at least a third is regarded as obsolete. The market is expected to gradually improve but primarily for good quality “Grade A” buildings. Some occupiers have taken advantage of favourable lease terms and upgraded to modern, high quality accommodation, often moving out of poorer quality secondary premises. The commercial property market is currently seen to be lagging behind the reported uptick in the oil and gas sector, although very limited speculative development has returned to the new build industrial market with smaller multi-let units at Kingshill Commercial Park at Westhill and City South Business Park at Portlethen.

Issues for the Future

A number of initiatives to support and improve the economy of the region have been established in recent years. **Opportunity North East (ONE)** is a partnership between the private and public sectors to respond to the regional economic challenge of maximising the oil and gas opportunity, as well as rebalancing the economy of Aberdeen and Aberdeenshire by supporting other important sectors. **Invest Aberdeen** is a collaboration between the two councils aiming to attract and deliver inward investment to the Aberdeen City Region and promote the Energetica Corridor. The Aberdeen Western Peripheral Route (A90) opened during this Audit period and is now operational. This has improved the road links from the south to the north and west of Aberdeen City and beyond into Aberdeenshire. The completion of key projects in Aberdeen city centre, including the recent Art Gallery redevelopment and Music Hall refurbishment hope to boost the city centre experience for residents and visitors alike. Elsewhere, the new TECA at Bucksburn is now open and welcoming major acts and events to the city. Work continues on the Aberdeen Harbour Expansion Project which is expected to complete in 2020.

The rate at which land is transformed from the marketable to the immediately available supply, and the subsequent building out of this land, will be determined largely by market forces. Within Aberdeen City and the nearby Aberdeenshire towns, market forces remain closely linked to the fortunes of the oil and gas industry. While some confidence is reported to have returned to the oil and gas industry with the oil price having stabilised over the past two years, it is likely to be some time for this to lead to any marked increase in the take up of employment land.

Following the Barclay Review of non-domestic rates in Scotland, a number of measures were announced by the Scottish Government in September 2017 to boost economic growth through relief from business rates. Since 1 April 2018 business rates are not payable on a new build commercial property until a new business tenant has been secured, and the tenant benefits from one year without having to pay rates, known as Business Growth Accelerator Relief. This removes the risk of vacant rates for speculative new build development for developers and is hoped will attract occupiers for new offices or industrial properties. Any potential effect of these measures on the take up of land for new build premises in the North East of Scotland has yet to have a significant impact, although there have been a small number of speculative workshop units built this year at Kingshill Commercial Park, Westhill and City South Business Park. Portlethen.

Land ownership can also be a significant constraint to the development of employment land, particularly if the land is allocated for mixed uses and owned by a developer for whom office and/or industrial space is not a priority compared to housing. The two local authorities have seen delivering employment space within large new developments as a vital part of ensuring mixed and sustainable communities. However, within Aberdeenshire in particular, the employment land element of these mixed use allocations in the LDP has been slow to progress in the short to medium term. Aberdeenshire also faces the issue of limited demand and a subsequent low take up of employment land allocations in rural areas and the north compared to sites within settlements close to Aberdeen. In addition, it has recently been reported that employment land values have fallen by 45% since the market peak and many owners are said to be willing to wait for better economic recovery.

1. Introduction

1.1 Purpose of Audit

- 1.1.1 The Aberdeen City and Shire Employment Land Audit has been prepared to bring together into one source an up-to-date document with accurate information on the supply and availability of employment land in the North East of Scotland.
- 1.1.2 The audit is used to monitor the policies and proposals relating to employment land in the Strategic Development Plan (SDP) and the Aberdeen City and Aberdeenshire Councils' Local Development Plans (LDP). In addition, the information provided in the audit assists in the preparation of economic strategy and policy making and in the implementation of action plans, and may highlight areas where further research and analysis is required. The audit is also of interest to companies, developers and other organisations with a requirement for, or interest in, employment land in the North East of Scotland
- 1.1.3 Officials of Aberdeen City and Aberdeenshire Council together with the Strategic Development Planning Authority have prepared the audit. Reference is also made to relevant information and research from the private sector. This has helped ensure the provision of a robust and comprehensive source document for employment land supply to assist in delivering the future prosperity of the North East of Scotland.

2. Background

2.1 Scotland and North East Scotland Economic Strategies and Policies

2.1.1 The **Scottish Government Economic Strategy**, published in 2015, sets out the broad agenda for the Government's focus on Scotland's economy. The aim is for a more cohesive and resilient economy that improves the opportunities, life chances and wellbeing of every citizen. It identifies four strategic priorities:

- Investment in people, infrastructure and assets
- Promote inclusive growth
- Foster a culture of innovation
- Enable Scotland to take advantage of international opportunities

2.1.2 The Scottish Government adopted the **National Planning Framework 3 (NPF3)** in June 2014. The NPF3 sets out the Government's development priorities over the next 20 to 30 years. The NPF3 has significant implications for the development of employment land in Aberdeen City and Shire. The Aberdeen Harbour expansion and improvements to Aberdeen Airport are included as National Developments. NPF3 also reinforces the importance of infrastructure provision, particularly improvement to transport links, such as the Aberdeen Western Peripheral Route, and major energy-related projects.

2.1.3 NPF3 highlights the potential for both Aberdeen and Aberdeenshire to apply their energy sector and offshore strengths to the development of renewable and clean energy technologies. Aberdeen is focusing on strengthening its role as Scotland's northern gateway and broadening its economic base. Preliminary work and consultation on NPF4 is expected to begin in the coming months following the arrival of the Planning (Scotland) Act 2019 earlier this year.

2.1.4 In early 2016 the **Aberdeen City Region Deal** was awarded funding by the UK and Scottish Governments of £250 million over the next 10 years to improve infrastructure in the region and attract employment opportunities.² Aberdeen City and Aberdeenshire Councils work in partnership with the private sector led economic development agency, **Opportunity North East (ONE)**, which has replaced ACSEF (Aberdeen City and Shire Economic Future). The focus of ONE is on diversifying oil and gas, tourism, food and drink, and life sciences to create a sustainable economic future for the area. A **Regional Economic Strategy** was published in December 2015 which provides a shared vision and ambition for the future of the North East of Scotland to align commitment, investment and action in pursuit of its economic growth and diversification objectives. It is updated and supported by the **2018-2023 Action Plan** to respond to the changing economy and new opportunities. **Invest Aberdeen** was established in 2018 as a regional investment hub in a partnership between Aberdeen City and Aberdeenshire Councils.

² An additional £254 million was committed by the Scottish Government in parallel with the City Region Deal.

- 2.1.5 A new regeneration strategy for Aberdeenshire was approved in March 2016 called “**From Strategy to Action: Developing Excellence in our North Coast Communities**” - this sets out revised proposals for the regeneration of the north coast towns of Fraserburgh, Banff, Macduff and Peterhead, with each town having its own Vision and Action Plan.
- 2.1.6 The **Energetica** project aims to highlight attractive development propositions along the A90 corridor from Bridge of Don and the airport in Aberdeen City, through Ellon, to Peterhead in Aberdeenshire. Energetica has now transitioned into an overall inward investment programme for the region known as **InvestAberdeen**.
- 2.1.7 The Scottish Government’s planning policy for economic development is set out in **Scottish Planning Policy (SPP)** published in June 2014. The SPP requires Councils to allocate sites that meet the diverse needs of different sectors and sizes of business and to take a flexible approach, allowing changing circumstances to be accommodated and new opportunities to be realised. SPP is expected to be combined into the new NPF4, although the timescale for the preparation of this is currently unknown.
- 2.1.8 Planning authorities should ensure that there is a range and choice of marketable sites and locations for businesses allocated in development plans, including opportunities for mixed use development, to meet anticipated requirements and a variety of size and quality requirements. Marketable land should meet business requirements, be serviced or serviceable within 5 years, be accessible by walking, cycling and public transport, and have a secure planning status. The SPP states that business land audits should be undertaken regularly to monitor sites within the existing business land supply and to inform reviews of development plans. This audit provides a useful tool to measure performance against some of the requirements of Scottish Planning Policy and the Strategic Development Plan (see paragraph 2.2.1 below).

2.2 Aberdeen City and Shire Strategic Development Plan

- 2.2.1 The Aberdeen City and Shire Strategic Development Plan was approved by Scottish Ministers in March 2014. The plan, which sets out a strategic framework for the management of land in the North East up to 2035, requires the Aberdeen and Aberdeenshire Local Development Plans to identify land for business and industrial uses throughout the plan periods. The Proposed Strategic Development Plan has been submitted to the Planning and Environmental Appeals Division (DPEA) of the Scottish Government for an Examination in public.
- 2.2.2 Specific employment land allowances are stated for the four identified strategic growth areas:
- Aberdeen City
 - Aberdeen to Peterhead
 - Aberdeen to Huntly
 - Aberdeen to Laurencekirk

There is also flexibility for Aberdeenshire Council to determine an appropriate mechanism for 'local growth and diversification' areas. Business and industrial development rates are to be monitored to ensure continuity of employment land supply. In this respect the audit contributes to the monitoring requirements of the Strategic Development Plan.

- 2.2.3 The targets under the Economic Growth Objective of the Strategic Development Plan include:
- To make sure there is at least 60ha of marketable land available to businesses at all times in a range of places within Aberdeen City
 - To make sure there is at least 60ha of marketable land available to businesses at all times within the strategic growth areas in Aberdeenshire
 - For at least 20ha of the above land available to businesses in the strategic growth areas to be of a standard which will attract high-quality businesses or be suitable for company headquarters

These targets remain unchanged in the Proposed Strategic Development Plan.

- 2.2.3 In the new Planning (Scotland) Act 2019, Strategic Development Plans will be replaced by Regional Spatial Strategies. This will be implemented in due course with further guidance.

2.3 Aberdeen City and Aberdeenshire Local Development Plans

- 2.3.1 The Aberdeen City and Shire Strategic Development Plan 2014 seeks to provide opportunities which encourage economic development and create new employment in a range of areas that are both appropriate for and attractive to the needs of different industries. In turn, Local Development Plans for Aberdeen City and Aberdeenshire are required to identify employment land allocations and identify strategic reserve land to meet this objective.
- 2.3.2 The Aberdeen Local Development Plan was adopted in January 2017 and aims to maintain a generous supply of employment land to ensure Aberdeen retains its position as a competitive and sustainable business location. In order to meet the diverse needs of different types of businesses, a range of allocations have been identified of varying sizes and locations. This will also ensure the Planning Authority is well equipped to manage future proposals efficiently and effectively during the Plan period.
- 2.3.3 The Aberdeenshire Local Development Plan was adopted in April 2017. The plan promotes an 'open for business' approach and considers the development of business as being very important to the economic health of the region. It supports the development of business and sustainable economic growth in all areas by taking account of the economic benefits of a proposed development when making decisions in development management.
- 2.3.4 The new and existing employment land sites allocated in the Aberdeen City and Aberdeenshire Local Development Plans, both 2017, are included in the Employment Land Supply tables that can be found in *Appendices 2 and 3*. In addition, several previously allocated employment sites have now been removed from the 2017 plans and no longer appear in the audit. The audit supports the monitoring requirements of the two Local Development Plans.
- 2.3.5 Both Councils are working on the review of their current Local Development Plans and their Proposed Local Development Plans are expected to be approved in 2020.

- 2.3.5 Aberdeen City Council approved the City Centre Masterplan and Delivery Programme in June 2015, which focuses on improving the quality of the environment in the city centre and developing cultural and recreational facilities to create a more vibrant social scene. There is also scope for attracting more tourists to the city and expanding the service sector, including financial services. The city's role as a regional media centre is promoted by the Masterplan. This provides the base for a larger creative sector which supports jobs and businesses and improves the perceptions of Aberdeen. Some of the projects that have been completed include Broad Street improvements, as part of the Marischal Square development.

2.4 Employment Land Monitoring Arrangements

- 2.4.1 The audit is a record of the employment land supply in Aberdeen City and Shire at a given date. It shows the supply of marketable land as required by SPP. Significant non-allocated brownfield development sites which have been granted consent for use classes 4, 5 or 6 have also been considered. It does not provide information on the range and size of individual plots within new employment areas, nor does it provide detailed information on vacant land within existing, completed sites. Aberdeen City Council additionally publishes a Development Activity Report, which monitors the development of new Class 4 (business) uses in the City.

- 2.4.2 Further information on properties and sites in Aberdeen City and Aberdeenshire is available from the following sources:

1. The 2018-2019 Aberdeen Industrial Areas Guide:
<https://www.aberdeencity.gov.uk/services/strategy-performance-and-statistics/statistics-and-information/place>
2. The Aberdeenshire Business and Industrial Areas Guide 2014
<https://www.aberdeenshire.gov.uk/media/4742/gdt21982iaquideprintfilev5.pdf>
3. The 2018 Scottish Annual Vacant and Derelict Land Survey (published April 2019):
<https://www.gov.scot/publications/scottish-vacant-derelict-land-survey-2018/>
4. The Aberdeen City Council Vacant and Derelict Land Survey 2018 Report
https://www.aberdeencity.gov.uk/sites/default/files/2019-03/Scottish%20Vacant%20and%20Derelict%20Land%20Survey%202018_0.pdf
5. Scottish Assessors Grampian Valuation Roll:
<https://www.saa.gov.uk/grampian/>
6. Aberdeen City Council Development Activity Report 2018
<https://www.aberdeencity.gov.uk/sites/default/files/2019-07/Development%20Activity%20Report%202018.pdf>

3. Employment Land Audit 2018/19

3.1 Preparation of Audit

- 3.1.1 The audit is prepared from information gathered by officials from both Councils, through their monitoring of planning approvals and individual site inspections. The information is kept up-to-date throughout the year and the status of sites checked and reviewed prior to publication. The base date for the published data is 1 April 2019, and the period monitored is 1 April 2018 to 31 March 2019. (Up until 2009, the base date for the audit had been 1 January each year and the period monitored covered a calendar year.)

3.2 Employment Land Supply

- 3.2.1 Several categories of land supply are identified in the audit. *Appendix 1* provides a list of definitions used for these categories. Information on established, constrained, marketable and immediately available employment land supply is given in full in *Appendices 2 and 3*. The information has been divided by area (Aberdeen City and Aberdeenshire. Aberdeenshire is further divided by Administrative Area and settlement - see *Figure 1*). It includes details of site area and location, developer, constraints and servicing status. *Appendix 4* presents the information for Aberdeenshire by strategic growth areas and regeneration priority areas. *Appendix 5* contains information on historical employment land take-up rates in Aberdeen City and Aberdeenshire, together with an additional table which provides a description of the type and size of development that has taken place in the past year.

Figure 2 - Aberdeen City and Aberdeenshire Map



Based on Ordnance Survey mapping. © Crown copyright reserved. Aberdeenshire Council 0100020767 2009.

3.3 Established Employment Land Supply

3.3.1 The established employment land supply for Aberdeen City and Aberdeenshire is shown in *Figure 3*. This includes all undeveloped land that is allocated for industrial and business uses (Use Classes 4, 5 and 6) in local development plans or has a valid planning approval for these uses.

Figure 3 - Established Employment Land Supply (in hectares) April 2018 and April 2019

Employment Area	2018	2019	Change
Aberdeen City	286	274	-4%
Aberdeenshire	553	548	-1%
TOTAL	839	822	-2%

3.3.2 In Aberdeen City the level of established land supply has decreased by 4% to 274ha between April 2018 and April 2019. Over the past year no further employment land sites have been commenced and 12ha was completed at OP19 Rowett North. There have been no new identifications of employment land, and no additions have been made to the existing areas.

3.3.3 In Aberdeenshire there has also been a minor decrease in the established land supply between 2018 and 2019 with a reduction of 5ha to now total 548ha. Completions in the past year covered 3.4ha and a further 1.9ha were under construction as at April 2019. Take up of sites has been considerably lower compared to the previous year with individual small developments spread over Aberdeenshire at Blackburn, Ellon, Westhill, Huntly, Macduff and Peterhead.

3.3.4 Take up of employment land in Aberdeenshire over the past year of just over 3ha is a significant drop compared to the average of around 14ha per annum over the previous 10 years and is at the lowest level since 2005. In addition, sites totalling only 1.9ha were found to be under construction as at 1 April 2019. In Aberdeen City there are currently no new developments under construction on employment land. Despite the recent reduction in take up, the supply of employment land remains generous and exceeds the requirements of the Strategic Development Plan. However, any reported improvement in the local economy, and increase in confidence returning to the energy sector in particular, may take some time to have an effect on the take up of land for new build projects.

3.4 Constrained Employment Land Supply

- 3.4.1 Employment land that is subject to constraints in Aberdeen City and Aberdeenshire is shown in *Figure 4*. The constrained land supply includes sites which are not expected to come forward in the short to medium term because of difficulties that need to be overcome, such as ownership issues, planning and phasing issues, insufficient infrastructure in place and contamination.

Figure 4 – Constrained Employment Land Supply (in hectares) April 2018 and April 2019

Employment Area	2018	2019	Change
Aberdeen City	64	64	0%
Aberdeenshire	245	267	9%
TOTAL	309	331	7%

- 3.4.2 There has been no change in the constrained land supply for Aberdeen City between April 2018 and April 2019, remaining at 64ha for a fourth year, which equates to 22% of its established supply. The constrained supply takes into account allocations within the Aberdeen LDP which do not currently have a Development Framework or Masterplan or are unlikely to see significant progression in the near future. The figure also takes into account employment land allocations within larger mixed use land release sites such as Grandhome and Loirston. The employment land within such allocations will likely be delivered at a later stage of the overall development and is therefore designated as constrained within the audit.
- 3.4.3 The amount of constrained land in Aberdeenshire increased by 9% to 267ha and now makes up 49% of its established supply. The change is largely due to the recent development appraisals carried out for the proposed Energetica Industry Park on nearly 17ha of employment land at Peterhead concluding that cost of servicing the site is not commercially viable in the short to medium term. In addition, several LDP sites remain constrained either because they do not yet have agreed masterplans or because the planned phasing means the employment land element is not expected come forward until a later stage, and so they are not classed as currently marketable. Other sites have significant infrastructure issues to overcome, in particular the proposed redevelopment of the former Edzell Air Base.

3.5 Marketable Employment Land Supply

- 3.5.1 The marketable employment land supply for Aberdeen City and Aberdeenshire is shown in *Figure 5*. These figures include land which is both immediately available and land which is not immediately available but does not face any major constraints to development and could come forward within 5 years.

Figure 5 - Marketable Employment Land Supply (in hectares) April 2018 and April 2019

Employment Area	2018	2019	Change
Aberdeen City	223	210	-6%
Aberdeenshire	307	281	-9%
TOTAL	531	491	-8%

- 3.5.2 The marketable land supply in Aberdeen City has decreased by 6% from April 2018 to April 2019 to 210ha as the first phase of the OP19 Rowett North site has been built out. In Aberdeenshire there has been a net decrease of 9% in the supply of marketable land, as a small number of sites have been built out or are under construction and others have moved into the constrained supply.
- 3.5.3 The supply of marketable land in Aberdeen City and key Aberdeenshire settlements remains generous with a wide choice of sites currently available. Aberdeen City and Aberdeenshire continue to have an adequate choice and supply of marketable land, following both Councils having adopted their new Local Development Plans in 2017, and continue to exceed the requirement for the supply of marketable employment land in the Strategic Development Plan.
- 3.5.4 The requirement in the Strategic Development Plan for at least 20ha of the total marketable supply in the strategic growth areas to be of a standard that will attract high quality businesses or be suitable for company headquarters has also been met. In Aberdeen City there are still over 16ha at Prime Four, Kingswells available for high quality business use. In Aberdeenshire sites have been allocated specifically for high quality business use/company headquarters at both Inverurie and Chapelton. In addition, other sites in and around Aberdeen have attracted high quality business development, such as City South, Portlethen and the business parks in the vicinity of Aberdeen Airport.
- 3.5.5 Demand for land in Aberdeenshire tends to be in those settlements concentrated around Aberdeen City such as Westhill, Kintore, Ellon and Portlethen. As a result, employment land in these areas tends to be taken up more quickly while large allocations of land in the north of Aberdeenshire are often taken up at a much slower rate.

3.6 Immediately Available Employment Land Supply

- 3.6.1 The immediately available employment land supply for 2018 is shown in *Figure 6*. This is marketable land that currently has planning permission or a secure planning status, is serviced and has no major constraints to immediate development.

Figure 6 - Immediately Available Employment Land Supply (in hectares) April 2018 and April 2019

Employment Area	2018	2019	Change
Aberdeen City	52	52	0%
Aberdeenshire	68	64	-6%
TOTAL	120	116	-3%

- 3.6.2 The supply of immediately available land in Aberdeen City has remained unchanged at 52ha in April 2019, with no further sites having commenced over the past year.
- 3.6.3 In Aberdeenshire there has been a small net decrease of 6% in the supply of immediately available land to 64ha. Much of the immediately available land is concentrated relatively close to Aberdeen at Westhill, Portlethen, Marywell, Ellon, Banchory and Oldmeldrum, but there are also a number of sites in other areas of Aberdeenshire, such as Macduff, Peterhead, Fraserburgh, Inch and Huntly.
- 3.6.4 Overall some 45% of all immediately available land is currently located within Aberdeen City and 55% within Aberdeenshire. 19% of the established supply of land in Aberdeen City is immediately available compared with 12% in Aberdeenshire, reflecting the stronger demand in the City. Almost three quarters (47ha) of the immediately available land in Aberdeenshire is situated within an 18 mile radius of Aberdeen.

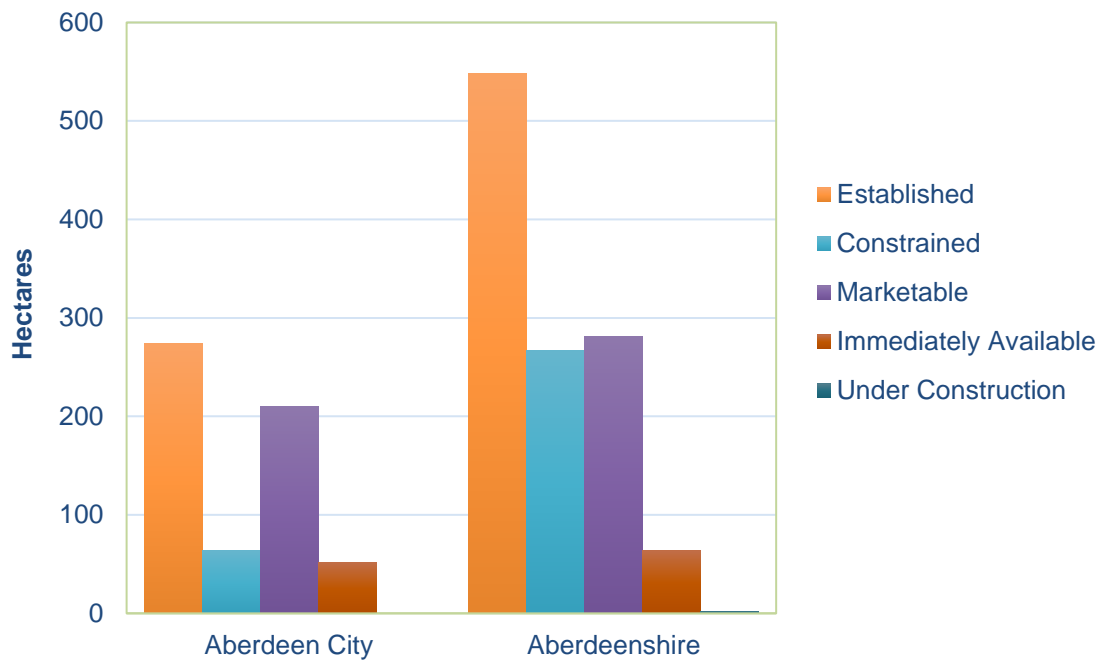
3.7 Under Construction

- 3.7.1 Land under construction is not included in the above categories, as it is neither available nor considered as developed. On completion it will, however, be reflected in the historical development rates for next year's audit. Land under construction is identified in *Appendices 2 and 3* of the Audit. At April 2019 there were no further sites under construction in Aberdeen City. Within Aberdeenshire new build activity has also fallen significantly compared to recent years where just under 2ha was found to be under construction.

3.8 Employment Land Supply Summary

3.8.1 *Figure 7* gives a summary of the amount of land in Aberdeen City and Aberdeenshire which falls into each of the supply categories. NB: The Established Land Supply column represents the *total* supply of land in the corresponding area. The marketable supply includes land which is both immediately available and that which is not considered to be immediately available, but does not face any constraints to it coming forward within the next five years. Therefore the immediately available column reflects the proportion of marketable land which is serviced and awaiting development.

Figure 7 - Employment Land Supply Summary April 2019



4. Analysis of Trends³

4.1 Employment Land Take-Up and Market Activity

- 4.1.1 In 2018/19 just over 3ha of employment land was developed in Aberdeenshire, well below the average development rate of approximately 14ha per year for the previous 10 years, and less than 2ha are presently under construction. This is a considerable reduction in the development of employment land compared to recent years, in contrast with the improvement in the oil price and reported increase in confidence within the oil and gas industry. In Aberdeen City, one large site of 12ha comprising Phase 1 of the OP19 Rowett North development (TECA) has completed over the past year and no further sites are under construction.
- 4.1.2 In mid 2018 the price of Brent Crude rose above \$70 per barrel for the first time since late 2014 and encouraging signs of improvement in trading conditions in the oil and gas industry have been reported. (See Figure 12) .It is anticipated that ongoing price stability in the region of \$60 - \$65 per barrel, together with the vast reduction in operating costs achieved over the last 3-4years, has allowed companies to better plan for the future. Confidence within the energy sector has improved, recruitment is said to be on the rise and more contracts are being awarded.
- 4.1.3 The current low levels of new build development in both Aberdeen City and Aberdeenshire, despite an improvement within the local economy, demonstrate the considerable time lag involved before any increase in market confidence and demand leads to renewed take up of land. For many occupiers, they already have surplus accommodation that can absorb immediate increased requirements and commitment to any new build premises is likely to be further into the future should the cautiously optimistic outlook continue. Similarly, the development of employment land continued to be strong for a few years following the dramatic fall in oil prices in 2014 as commitment to new build projects had often already been made.
- 4.1.4 Within Aberdeenshire the limited new build development has mostly comprised of small industrial units on employment land sites both close to Aberdeen at Westhill, Blackburn and Oldmeldrum and further afield at Huntly, Peterhead and Macduff.

4.2 Office Space – Market Activity

- 4.2.1 Reports from local agents state that the office market in Aberdeen and the North East region is at a low point with supply continuing to significantly outstrip demand. Although the energy sector is seen to have stabilised and a degree of confidence within the industry has returned, this has not yet had a positive effect on the office market which is seen to be lagging behind the economy. The market is expected to gradually improve as more requirements filter through and supply decreases, although this is mainly confined to Grade A space. In 2018 several companies within the energy sector took advantage of the market and attractive lease incentives to move to recently built higher quality buildings in more desirable locations in the city centre. However, at present there are no further new office developments in the pipeline which may prompt a trend towards city centre office refurbishments.

³ Published Sources: *Knight Frank Aberdeen Office Market Activity Report Spring 2019* ; *Ryden 84th Scottish Property Review April 2019*; *CBRE Marketview Aberdeen Office H2 2018 and Q1 2019*.

Approximately one third of available office space is of such poor quality that it is expected to be demolished or redeveloped for alternative uses.

Figure 9 below shows both the increase in supply of office space and the low levels of take up over the past five years as a result of the downturn in the oil industry.

Figure 9: Aberdeen Office Supply and Take Up



Source: Ryden, 84th Property Review, pg8, April 2019

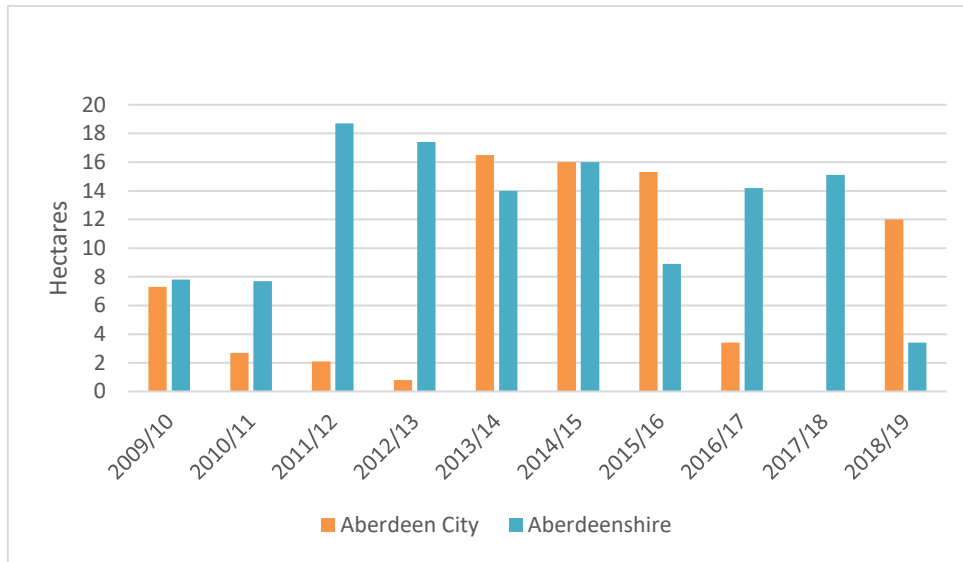
4.3 Industrial Space – Market Activity

4.3.1 Local agent reports indicate that the industrial market in and around Aberdeen remains difficult and supply continues to outstrip demand. Some oil and gas operators are still placing large industrial premises on the market as they continue to consolidate and reduce costs. Most demand has been confined to good quality high specification industrial units and a large proportion of current stock (about 40%) is not regarded as fit for purpose.

Limited speculative development has returned to the market in the form of smaller multi-let industrial developments in prime locations, such as at Kingshill Commercial Park, Westhill, and City South, Portlethen.

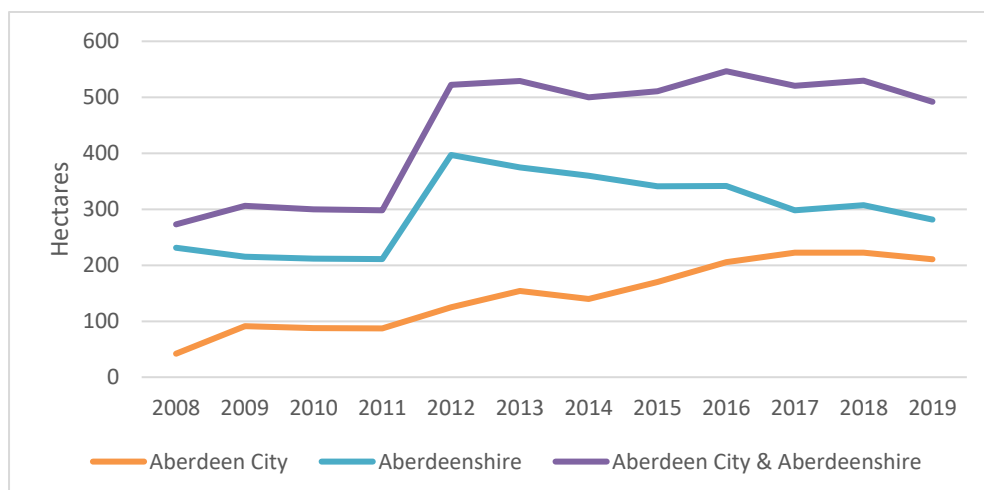
4.4 Trends in Employment Land

Figure 10: Employment Land Development Rates 2009/10-2018/19



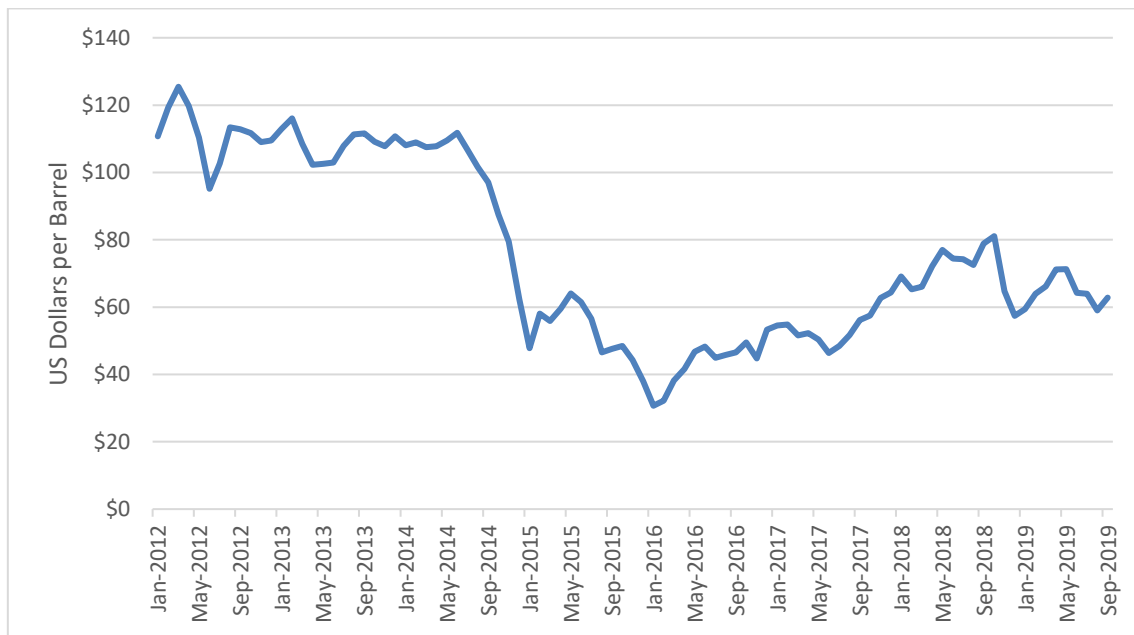
4.4.1 Figure 10 shows that Aberdeenshire had dominated the take-up of employment land up to 2012/13. However, this changed over the following 3 years with substantial rates of take up in Aberdeen City where a period rapid development took place on many of the large employment sites allocated in the LDP. Most recently, take up of employment land can be seen to have dropped back in the City during 2016/17, there were no further sites completed in 2017/18 and the higher completion level for 2018/19 can be entirely attributed to the TECA mixed use development at Rowett North. However, it is hoped that take up of employment land will pick up over the next few years as other mixed sites with employment uses gradually come forward. Development rates in Aberdeenshire had remained relatively steady over the 10 years to 2017/18, averaging 14ha per annum. However, 2018/19 has seen a large fall with take up totalling just over 3ha from a number of small developments spread over Aberdeenshire.

Figure 11: Trends in Marketable Employment Land in Aberdeen City and Shire 2008-2019



4.4.2 Figure 11 shows that both Aberdeenshire and Aberdeen City had a steady amount of marketable land supply up until the Structure Plan of 2009 and the release of land through the subsequent adoption of the two LDPs in 2012, when the supply of marketable land increased significantly. The totals are expected to remain fairly steady at this higher level in the near future, as some sites allocated by the LDPs are developed and subsequently replaced by the progression of other sites into the marketable supply. However, following the downturn in the oil and gas industry over the past four years, fewer marketable sites are expected to come forward in the near future and existing sites are being taken up at a slower rate. Aberdeenshire shows a slight fall in the marketable supply since 2012 as sites had been taken up and some larger LDP allocations were moved into the constrained supply as they are not now expected to come forward in the short to medium term. In Aberdeen City a steady increase in marketable employment land has begun to tail off with the completion of sites or first phases. The progression (and eventual adoption) of a new Local Development Plan may influence this trend in the coming years.

Figure 12: Europe Brent Crude Price January 2012 – September 2019



Source: *eia.gov* (US Energy Information Administration)

4.4.3 Figure 12 above shows the dramatic fall in the oil price towards the end of 2014 from over \$100 per barrel to below \$40 per barrel in early 2016. Over the 9 months from January to September 2019 the price has averaged \$65 per barrel and it is anticipated that ongoing price stability in the region of \$60 - \$65 per barrel will continue in 2020. Oil price stability, together with the vast reduction in operating costs achieved over the last 3-4 years, may now allow companies to plan for the future. However, there will be a time delay before any return of confidence to the energy industry filters through to an uptake in the rate of development on employment land sites.

Appendix 1: Glossary

Brownfield Sites

Land which has been built on or used in the past for some development purpose. Brownfield land does not include private or public gardens, sports pitches, woodlands or open spaces used for leisure and recreation purposes. The grounds of institutions (such as schools and hospitals) that are no longer used are not considered as brownfield sites. Brownfield sites have only been included in the audit where planning permission has been granted for employment land use on sites above 0.1 hectares in size.

Constrained Employment Land Supply

This includes land for example, that has planning difficulties, land subject to ownership difficulties (e.g. multiple ownership/unwilling sellers), land subject of local plan objections, land with insufficient infrastructure provision, etc. This category therefore includes much of the land in the Established Employment Land Supply that is not Marketable (see below). Sites with a constraint shown as "Other" do not yet have a development framework or masterplan and are considered unlikely to come forward in the short to medium term.

Development Rates

These refer to the sum of the net area of employment land that has been developed in a particular year. A site is considered to be developed once the first building has been constructed, even though further building may take place within the same site at a later date.

Employment Land

This includes land for general industrial and business/office use, storage and distribution uses, business parks and specialist technology parks including research and development uses. This comprises Classes 4 (Business), 5 (General Industrial) and 6 (Storage or Distribution) of the 1997 Town and Country Planning (Use Classes) (Scotland) Order, but is not exclusive to these uses.

Established Employment Land Supply

This includes all undeveloped land that is allocated for industrial/business/employment use in finalised or adopted Local Plans or has a valid planning approval for these uses.

Greenfield Sites

Sites which have never been previously developed, or are fully restored derelict land.

Immediately Available Land Supply

This is marketable land that currently has planning permission or has a secure planning status, is serviced and has no other major constraints to immediate development. This definition is useful in the assessment of whether demand for land is being adequately met.

Marketable Land Supply

This is land that as well as meeting business requirements, has a secure planning status, can be serviced within 5 years, is accessible by walking, cycling and public transport as defined by SPP. It is incumbent on the two planning authorities to ensure that a supply of marketable land is available throughout their areas at any one time, as set down in the Strategic Development Plan. Land that is restricted to Class 4 (Business) use only is considered marketable. Land that is held as 'option land' for existing companies' own expansion cannot be considered to be marketable.

Net/Gross Figures

In general net figures are used where it is known how the site is to be developed or where development of the site is in progress, which in some cases can be spread over a number of years. The net area is generally expressed as 80% of the gross site area to account for roads, landscaping etc. Net areas are also used for completions and sites under construction. LDP allocations that have yet to come forward have not been adjusted to a net area – this is done once further detail about the how the site is to be developed becomes available.

Serviced

The area of undeveloped land for which servicing has been provided either on the site itself or the wider site.

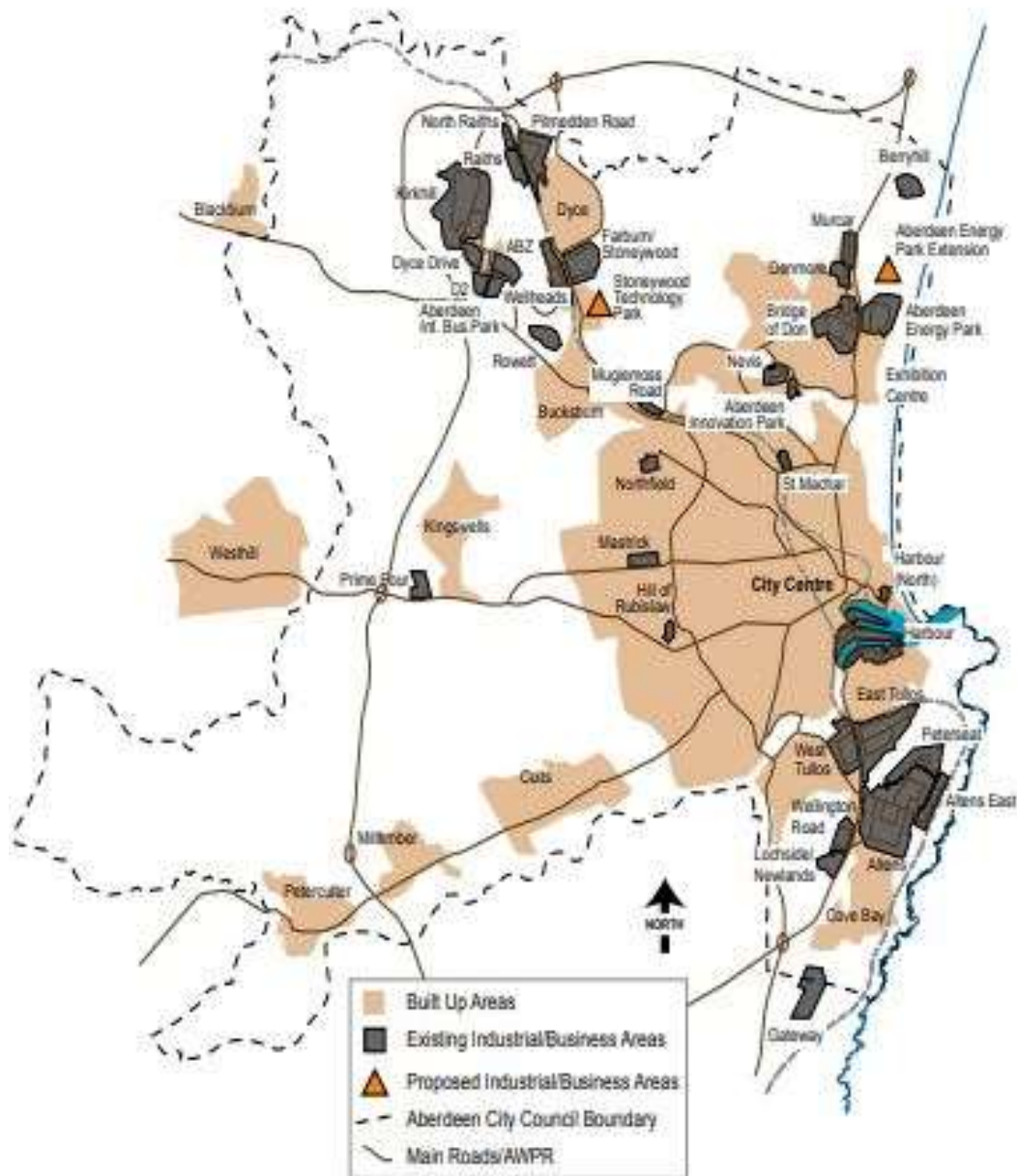
Under Construction

The area of land under construction but not yet complete. This land is not included within the land supply totals.

Development Rates

Development rates are shown in Appendix 5. Since the 2009 audit, the base date used has altered from a calendar year to April-March. Annual development rates shown in Appendix 5 since 2009 reflect the period 1 April of the year indicated to 31 March of the following year.

Appendix 2



Aberdeen City Industrial and Business Areas 2018-19

From Aberdeen City Council Industrial Areas Guide

APPENDIX 2: Employment Land Supply in Aberdeen City (all figures in hectares)

Location	Developer	Constraints	Serviced	Established	Constrained	Marketable	(of which) immediately available	Under Construction
Lochside/Newlands (Balmoral Business Pk)	Balmoral Group	None	Yes	2.2	0	2.2	2.2	0
Aberdeen Gateway	Halladale Muir	None	Yes	2.4	0	2.4	2.4	0
Peterseat	Forbes Development Ltd	None	Yes	8.6	0	8.6	8.6	0
Altens East & Doonies	Aberdeen City Council / Esson F	None	Part	8.2	0	8.2	8.2	0
Aberdeen Science & Energy Park	Agent	Class 4 Only	Yes	1.5	0	1.5	0	0
Aberdeen Innovation Park	Agent	Class 4 Only	Yes	3	0	3	0	0
Findlay Farm	Aberdeen Science Parks LP	Class 4 Only	No	16.4	0	16.4	0	0
The Core Berryhill/Cloverhill	Private	None	No	68.4	0	68.4	0	0
Airport Dyce Drive	Miller, Abstract, ABZ Development Ltd	Infrastructure	Part	77.35	30.1	47.25	21.5	0
Dyce Drive 9 Dyce Avenue	Morley	None	Yes	1.1	0	1.1	1.1	0
Raiths, Dyce (Kirkton Drive)	Private	None	Yes	1.5	0	1.5	1.5	0
Wellheads West	Private	Noise & Height Restrictions	Yes	0.9	0	0.9	0.9	0
OP9 Grandhome	Grandhome Trust	Infrastructure/Phasing	No	5	5	0	0	0
OP18 Craibstone North & Walton Farm	Private	Physical/Other	No	1.5	1.5	0	0	0
OP19 Rowett North	Private	None	No	22.5	0	22.5	0	0
Prime Four	Drum	None	Part	16.5	0	16.5	5.9	0
OP33 Greenferns	ACC	Infrastructure/Phasing	No	10	10	0	0	0
OP34 East Arnhall	Private	Ownership/Marketability	No	1	1	0	0	0
OP38 Countesswells	Countesswells Consortium	None	No	10	0	10	0	0
O48 Oldfold	CALA	Infrastructure/Phasing	No	5	5	0	0	0
OP59 Loirston	Private	Infrastructure/Phasing	No	11	11	0	0	0
				274.05	63.6	210.45	52.3	0

APPENDIX 3: Employment Land Supply in Aberdeenshire (all figures in hectares)

Site Ref No	Location	Settlement	LDP 2017 Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	Imm Available	Under Const
Banff & Buchan											
B/AB/E/001	Cornhill Road	Aberchirder	BUS	Aberdeenshire Council	None	Part	1	0	1	0	0
B/FR/E/002	West Shore	Fraserburgh	BUS1	Aberdeenshire Council	None	Yes	0.27	0	0.27	0.27	0
B/FR/E/003b	Land at Watermill Road	Fraserburgh	BUS3	Robertson Property	Infrastructure	No	10.13	10.13	0	0	0
B/FR/E/007	Fairney Business Park	Fraserburgh	BUS1	Aberdeenshire Council	None	Yes	1.18	0	1.18	1.18	0
B/FR/E/008	Phingask	Fraserburgh	OP3	Aberdeenshire Council	Marketability	No	16.5	16.5	0	0	0
B/FR/E/009	Kirkton Development	Fraserburgh	OP1	Private Landowner	Other	No	4	4	0	0	0
B/IB/E/002	Inverboyndie Industrial Estate	Inverboyndie	BUS	Private Landowner	None	Yes	1.4	0	1.4	1.4	0
B/IB/E/003	Inverboyndie- Phase 2	Inverboyndie	BUS	Private Landowner	None	No	1.4	0	1.4	0	0
B/MC/E/001	Buchan Road - East	Macduff	BUS	Aberdeenshire Council	None	Yes	0.6	0	0.6	0.6	0
B/MC/E/003	Law of Doune and Tarlair Industrial Estate	Macduff	BUS	Private Landowner	None	Yes	1.9	0	1.9	1.9	0
B/MC/E/004	Buchan Road- West	Macduff	BUS	Private Landowner	Ownership	No	4.01	4.01	0	0	0
B/MC/E/005	Green Hills	Macduff	BUS	Private Landowner	None	No	12	0	12	0	0
B/RH/E/001	South of Ritchie Road	Rosehearty	OP1	Private Landowner	Infrastructure	No	2	2	0	0	0
Banff & Buchan Total:							56.39	36.64	19.75	5.35	0
Buchan											
U/AD/E/001	Land at Nether Backhill	Ardallie	OP1	Private Landowner	Physical/Marketability	No	0.3	0.3	0	0	0
U/AG/E/001	South of A948	Auchnagatt	OP1	Private Landowner	Marketability	No	0.5	0.5	0	0	0
U/CR/E/001	Land at Aulton Road	Cruden Bay	OP1	Claymore Homes	None	No	2	0	2	0	0
U/HT/E/001	East of A90	Hatton	OP4	A Wyness & Sons	None	No	0.8	0	0.8	0	0
U/LG/E/001	Inverquhomery Road	Longside	BUS	Private Landowner	None	No	1.2	0	1.2	0	0
U/LG/E/002	Land at Skinner Road	Longside	OP1	Unknown	Infrastructure/Other	No	1.7	1.7	0	0	0
U/ML/E/003	Newlands Road	Mintlaw	BUS1	Claymore Homes	None	Part	0.49	0	0.49	0.49	0.13
U/ML/E/005	Land at Nether Aden	Mintlaw	OP1	Bancon Homes	None	No	4	0	4	0	0
U/ML/E/006	Northwoods Business Park	Mintlaw		Colaren Homes	None	No	4.25	0	4.25	0	0
U/PH/E/002	Balmoor Industrial Estate	Peterhead	BUS2	Aberdeenshire Council	None	Yes	0.87	0	0.87	0.87	0

Site Ref No	Location	Settlement	LDP 2017 Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	Imm Available	Under Const
U/PH/E/003	Dales Industrial Estate West	Peterhead	BUS3	Aberdeenshire Council	Physical	Part	7.98	1.75	6.23	1.45	0
U/PH/E/004a	Dales Industrial Estate East	Peterhead	BUS3	Private Landowner	None	Part	0.7	0	0.7	0.7	0.6
U/PH/E/005a	Damhead/Upperton Industrial Estate North	Peterhead	BUS3	Private Landowner	None	Part	2.2	0	2.2	0	0
U/PH/E/006	Energetica Industry Park (Upperton Ind Est)	Peterhead	BUS3	Scottish Enterprise	Infrastructure/Marketability	No	16.6	16.6	0	0	0
U/PH/E/007	Wellbank (North)	Peterhead	BUS3	Score Group Ltd	Other	Part	26.9	9.9	17	0	0
U/PH/E/008	Burnside Business Park	Peterhead		Private Landowner	None	Part	0.37	0	0.37	0.37	0
U/PH/E/009	Inverugie Meadows	Peterhead	OP1	Private Landowner	Other	No	4	4	0	0	0
U/PH/E/010	Land at Wellbank (South)	Peterhead	OP6	Score Group Ltd	None	Part	4.5	0	4.5	0	0
Buchan Total:							79.36	34.75	44.61	3.88	0.73
Formartine											
F/BA/E/001	Land at Balmedie South	Balmeddie	OP1	Aberdeenshire Council	Other	No	5	5	0	0	0
F/BD/E/001	Land at Blackdog	Blackdog	OP1	Private Landowner	None	No	4	0	4	0	0
F/CT/E/001	Cuminestown Industrial Estate	Cuminestown	BUS	Aberdeenshire Council	Marketability	No	0.54	0.54	0	0	0
F/EL/E/005	Ellon Commercial Park	Ellon	BUS		None	Yes	2.97	0	2.97	2.97	0
F/EL/E/006	Balmacassie	Ellon	OP4	c/o Knight Frank	None	No	9	0	9	0	0
F/EL/E/007	Cromleybank	Ellon	OP1	Scotia Homes	Ownership	No	2	2	0	0	0
F/FV/E/001	South of Westfield Farm	Foveran	OP1	Harper & Cochrane Ltd	None	No	2	0	2	0	0
F/FV/E/002	South of Turin Way	Foveran	OP3	Private Landowner	None	No	1.5	0	1.5	0	0
F/NB/E/002	Newburgh Industrial Units	Newburgh	BUS	Private Landowner	None	No	1.96	0	1.96	0	0
F/NB/E/007	West of Airyhall	Newburgh	OP1	Private Landowner	None	No	0.8	0	0.8	0	0
F/OM/E/003b	Oldmeldrum Business Park/ Meadows Industrial Estate	Oldmeldrum	BUS	Private Landowner	None	Part	2.48	0	2.48	2.48	0
F/OM/E/005	West of Coutens Park	Oldmeldrum	OP2	Private Landowner	Other	No	4.2	4.2	0	0	0
F/PM/E/001	Cloisterseat	Pitmedden	BUS2	Norman P Lawie Ltd	Ownership/Infrastructure	No	1.58	1.58	0	0	0
F/PM/E/002	East of Pitmedden House	Pitmedden	BUS1	Norse Ltd	None		1.77	0	1.77	0	0
F/RO/E/002	South of Kinbroom House	Rothienorman	BUS	Private Landowner	Marketability	No	1.22	1.22	0	0	0
F/RR/E/001	West of Rashiereive Cottages	Rashiereive	OP1	Private Landowner	None	No	2	0	2	0	0

Site Ref No	Location	Settlement	LDP 2017 Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	Imm Available	Under Const
F/TF/E/001	Markethill North	Turriff	BUS1	Aberdeenshire Council	None	Yes	0.2	0	0.2	0.2	0
F/TF/E/003	Morrison Motors	Turriff	BUS2	Private Landowner	None		1.16	0	1.16	0	0
F/TF/E/004	Markethill Industrial Estate	Turriff	BUS1	Aberdeenshire Council	None	No	2.02	0	2.02	0	0
F/TF/E/005	South Of Markethill Road	Turriff	BUS1		Ownership	Yes	0.67	0.67	0	0	0
F/TF/E/007	North East of Markethill Industrial Estate	Turriff	OP3	Private Landowner	Other	No	1	1	0	0	0
F/TF/E/008	East of Markethill Industrial Estate	Turriff	OP4	Private Landowner	Other	No	1.7	1.7	0	0	0
F/TF/E/009	Adjacent to Broomhill Road/Markethill Industrial Estate	Turriff	OP5	Aberdeenshire Council	Other	No	4.5	4.5	0	0	0
F/TF/E/010	Adjacent to Wood of Delgaty	Turriff	OP1	Private Landowner	Other	No	10	10	0	0	0
F/TV/E/003	The Grange	Tarves	OP1	Private Landowner	Other	No	3	3	0	0	0
F/US/E/001	Woodlea East	Udny Station	OP1	Private Landowner	Ownership	No	1	0	1	0	0
F/WP/E/001	West Pitmillan	West Pitmillan	OP1	Private Landowner	None	No	3.1	0	3.1	0	0
Formartine Total:							71.37	35.41	35.96	5.65	0
Garioch											
G/BB/E/004	Blackburn Business Park	Blackburn	BUS	Private Landowner	None	Part	0.35	0	0.35	0.35	0
G/IS/E/005	Insch Business Park, Muiryheadless	Insch	BUS	Aberdeenshire Council	Ownership	Part	4.33	2.2	2.13	2.13	0
G/IS/E/007	North of Insch Business Park	Insch	OP4	Aberdeenshire Council	None	No	4	0	4	0	0
G/IV/E/005c	Port Elphinstone North	Inverurie	BUS10	Private Landowner	Contamination	No	2.5	2.5	0	0	0
G/IV/E/008	Highclere Business Park	Inverurie	BUS3	Private Landowner	None	Yes	0.6	0	0.6	0.6	0
G/IV/E/012	Inverurie Town Centre	Inverurie	OP2	Private/Aberdeenshire Council	Other	No	0.5	0.5	0	0	0
G/IV/E/013	Crichie	Inverurie	OP11	Crichie Dev Ltd/Dandara	Infrastructure	No	19	19	0	0	0
G/IV/E/014	Adj to Axis Business Centre	Inverurie	OP12	ANM Group Ltd	None	No	1.5	0	1.5	0	0
G/IV/E/015	Thainstone	Inverurie	OP13	ANM Group Ltd	None	No	18	0	18	0	0
G/IV/E/016	Port Elphinstone Central	Inverurie	BUS6	Kilbride Resources Ltd	None	No	2.5	0	2.5	0	0
G/IV/E/017	Crichiebank Business Centre	Inverurie	BUS5	Private Landowner	None	Part	0.5	0	0.5	0	0
G/IV/E/018	Kirkwood Commercial Park, Thainstone	Inverurie	OP16	Kirkwood Investments Ltd	None	Yes	5.5	0	5.5	1.7	0
G/KM/E/002	Quithie Road	Kemnay	BUS1	Private Landowner	Ownership	No	4.3	4.3	0	0	0
G/KM/E/004	Fyfe Park	Kemnay	BUS2	Private Landowner	None	Part	2.8	0	2.8	0	0
G/KT/E/002b	Kintore North/Bridgend	Kintore	BUS2	Private Landowner	None	No	2.5	0	2.5	0	0

Site Ref No	Location	Settlement	LDP 2017 Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	Imm Available	Under Const
G/KT/E/003b	Kintore Business Park	Kintore	BUS1	Private Landowner	None	Yes	0	0	0	0	0.44
G/KT/E/004	Kintore East	Kintore	OP1	Kintore Consortium	None	Yes	2.77	0	2.77	0	0
G/KT/E/005	Kintore South	Kintore	OP5	c/o Halliday Fraser Munro	Other	No	6	6	0	0	0
G/MB/E/003	Land at Millbank Crossroads	Millbank	OP1	Cluny Estates	Infrastructure	No	1.3	1.3	0	0	0
G/NM/E/003	Land at Redwood Cottage	Newmachar	OP3	Kirkwood Homes	None	No	5	0	5	0	0
G/WH/E/007	Arnhall/Silvertrees Business Parks	Westhill	BUS	Chap Construction	None	Yes	0.95	0	0.95	0.95	0
G/WH/E/008	Arnhall Gateway	Westhill	OP2	Westhill Dev Co Ltd	None	Yes	4.65	0	4.65	4.65	0
G/WH/E/009	Former Blockworks Site, Straik Road	Westhill		Private Landowner	None	Yes	0.86	0	0.86	0.86	0
Garioch Total:							90.41	35.8	54.61	11.24	0.44
Kincardine & Mearns											
K/AU/E/001	East of Glenfarquhar Rd	Auchenblae	OP1	Kincardineshire Investment Co	Other	No	1	1	0	0	0
K/CH/E/001	Chapelton	Chapelton	OP1	Elsick Dev Co Ltd	None	No	11.5	0	11.5	0	0
K/DL/E/001	Adj Bowling Green	Drumlithie	OP1		Land Use	No	0.5	0.5	0	0	0
K/EW/E/001	Newesk	Edzell Woods	OP1	Carnegie Base Services	Marketability/ Infrastructure	No	68.7	67	1.7	1.7	0
K/FD/E/001	Land at Auchenblae Road	Fordoun	BUS	DLB (Scotland) Ltd	None	No	0.46	0	0.46	0	0
K/GD/E/001	Linton Business Park	Gourdon	BUS	Aberdeenshire Council	None	Yes	1.29	0	1.29	1.29	0
K/GD/E/002	East of Linton Business Park	Gourdon	OP1	Private Landowner	None	No	3	0	3	0	0
K/LK/E/004	Mart Site West, Market St	Laurencekirk		Aberdeenshire Council	None	Yes	0.11	0	0.11	0.11	0
K/LK/E/005	North Laurencekirk	Laurencekirk	OP1	Kirkwood Homes	Infrastructure	No	11	11	0	0	0
K/LM/E/001	The Chapel	Luthermir	OP1	Private Landowner	Other	No	0.25	0.25	0	0	0
K/LM/E/002	Land at Aberluthnott Church	Luthermuir	OP2	Private Landowner	Other	No	0.25	0.25	0	0	0
K/MK/E/001	Land to the West of Marykirk	Marykirk	OP1	Fotheringham Property Devs Ltd	None	No	0.5	0	0.5	0	0
K/MW/E/006	Cairnrobin	Marywell	BUS	Private Landowner	Other	Part	56.7	37	19.7	12.2	0
K/NH/E/001	West Monduff Farm	Newtonhill	BUS	A&D Developments Ltd	None	No	6.65	0	6.65	0	0
K/NH/E/002	Land to West of A90	Newtonhill	OP2	Elsick Dev Co Ltd	None	No	12.1	0	12.1	0	0
K/PL/E/004	Badentoy Industrial Estate	Portlethen	BUS1	Badentoy Developments Ltd	None	Yes	5.6	0	5.6	5.6	0
K/PL/E/005	City South Business Park	Portlethen	BUS2	Dandara	None	Part	10	0	10	10	0.6

Site Ref No	Location	Settlement	LDP 2017 Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	Imm Available	Under Const
K/PL/E/008	Land to NW of Badentoy	Portlethen	OP1	Dandara	None	No	6.5	0	6.5	0	0
K/PL/E/009	Fairview	Portlethen	OP2	Private Landowner	None	No	4	0	4	0	0
K/SC/E/001	Roadside	St Cyrus	OP1	Private Landowner	Other	No	1.15	1.15	0	0	0
K/ST/E/003	East Newtonleys	Stonehaven	BUS2	Bancon Developments	None	No	11.5	0	11.5	0	0
K/ST/E/004	East Newtonleys	Stonehaven	OP5	Bancon Developments	None	No	7	0	7	0	0
K/ST/E/005	Redcloak	Stonehaven	BUS3	Private Landowner	None	No	1	0	1	0	0
Kincardine & Mearns Total:							220.76	118.15	102.61	30.9	0.6
Marr											
M/AB/E/004	Land to the west of Tarland Road	Aboyne	OP1	Private Landowner	Land Use	No	1	1	0	0	0
M/AF/E/002b	Land at Wellheads	Alford	OP2	Kirkwood Homes	None	No	1	0	1	0	0
M/AF/E/003	School Campus Site	Alford	OP1	Aberdeenshire Council	Ownership	Yes	1.2	1.2	0	0	0
M/BN/E/002	Hill Of Banchory	Banchory	BUS1	Bancon Developments	None	Yes	5.9	0	5.9	4.3	0
M/BN/E/003	Burn O'Bennie	Banchory	BUS2	Bancon Developments	None	No	2.21	0	2.21	0	0
M/BN/E/004	Lochside of Leys East	Banchory	OP2	Private Landowner	Other	No	2	2	0	0	0
M/HT/E/002	Steven Road	Huntly	BUS2	RB Farquhar	None	Yes	2	0	2	2	0.11
M/HT/E/004a	Deveron Road	Huntly	BUS1	Private Landowner	None	No	1.75	0	1.75	0	0
M/HT/E/005	Mart	Huntly	BUS3	Private Landowner	None	No	3.28	0	3.28	0	0
M/HT/E/006	Adj Linnorie	Huntly	OP6	Private Landowner	None	No	4.5	0	4.5	0	0
M/KM/E/001	Opposite School	Kennethmont	OP3	Private Landowner	None	No	0.6	0	0.6	0	0
M/KN/E/001	Land at Haugh Farm	Kincardine O'Neil	OP1	Private Landowner	Other	No	0.3	0.3	0	0	0
M/LD/E/002	Lumsden	Lumsden	BUS	Private Landowner	None	No	0.27	0	0.27	0	0
M/MF/E/001	Muir Of Fowlis	Muir of Fowlis	BUS	Private Landowner	None	No	0.3	0	0.3	0	0
M/RN/E/001	Rhynie Richmond Avenue East	Rhynie	BUS	Aberdeenshire Council	None	Yes	0.18	0	0.18	0.18	0
M/RN/E/002	Land north of Richmond Avenue	Rhynie	OP1		Other	No	0.6	0.6	0	0	0
M/TL/E/002	Glendesky	Tarland	OP1	Private Landowner	Other	No	1	1	0	0	0
M/TP/E/001	Station Garage	Torphins	OP1	Private Landowner	None	No	1.79	0	1.79	0	0
Marr Total:							29.88	6.1	23.78	6.48	0.11
Report Total:							548.17	266.85	281.32	63.5	1.88

APPENDIX 4: Strategic Growth Areas and Regeneration Priority Areas (all figures in hecatres)

Strategic Growth Area	Established	Constrained	Marketable Total	Immediately Available	Under Construction
Ellon-Blackdog	31.57	7	24.57	2.97	0
Peterhead-Hatton	64.92	32.25	32.67	3.39	0.6
Total	96.49	39.25	57.24	6.36	0.6
Huntly-Pitcaple	19.86	2.2	17.66	4.13	0.11
Inverurie-Blackburn	62.22	28	34.22	2.65	0.44
Total	82.08	30.2	51.88	6.78	0.55
Portlethen-Stonehaven	132.55	37	95.55	27.8	0.6
Sth of Drunmlithie-Laurencekirk	11.57	11	0.57	0.11	0
Total	144.12	48	96.12	27.91	0.6
Aberdeen HMA Local Growth	39.15	16.88	22.27	8.94	0
Rural HMA Local Growth	186.33	132.52	53.81	13.51	0.13
Total	225.48	149.4	76.08	22.45	0.13
Report Total	548.17	266.85	281.32	63.5	1.88

Regeneration Priority Area	Established	Constrained	Marketable Total	Immediately Available	Under Construction
Regeneration Priority Area	118.91	68.89	50.02	8.14	0.6
Outwith Regeneration Priority Area	429.26	197.96	231.3	55.36	1.28
Report Total	548.17	266.85	281.32	63.5	1.88

Appendix 5: Development Rates in Aberdeen City 2005 - 2018/19

NB: The monitored period for the Employment Land Audit changed from a calendar year to April-March in 2009

SITE LOCATION	2005	2006	2007	2008	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
1. Altens	-	-	-	3.0	-	-	-	-	-	0.9	-	-	-	-
2. Altens East	-	-	0.6	2.4	2.3	-	0.8	-	-	-	-	2.7	-	-
3. East Tullos/Redmoss	-	-	-	-	-	-	-	-	-	-	-	-	-	-
4. Lochside/Newlands	-	-	-	-	-	-	-	-	1.9	-	1.9	-	-	-
5. Peterseat	-	-	2.4	2.4	-	-	-	-	-	-	-	-	-	-
6. Wellington Road	0.7	-	-	-	-	-	-	-	-	-	-	-	-	-
7. West Tullos	-	-	-	-	-	-	-	-	-	-	-	-	-	-
8. Aberdeen Gateway	-	-	-	-	1.9	1.9	-	-	7.8	2.1	-	-	-	-
Sub Total	0.7	-	3.0	7.8	4.2	1.9	0.8	-	9.6	3.0	1.9	2.7	-	-
9. Links Road	-	-	-	-	-	-	-	-	-	-	-	-	-	-
10. Mastrick	-	-	-	-	-	-	-	-	-	-	-	-	-	-
11. Northfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-
12. St Machar	-	-	-	-	-	-	-	-	-	-	-	-	-	-
13. Kingswells (Prime Four)	-	-	-	-	-	-	-	-	6.8	6.8	6.6	0.7	-	-
Sub Total	-	-	-	-	-	-	-	-	-	-	-	0.7	-	-
14. Bridge of Don	-	-	-	-	-	-	-	-	-	-	-	-	-	-
15. Denmore	-	-	-	-	-	-	-	-	-	-	-	-	-	-
16. Newton of Murcar	-	-	-	-	-	-	-	-	-	-	-	-	-	-
17. Aberdeen Energy Park	-	0.2	-	1.4	1.8	-	0.7	-	-	-	-	-	-	-
18. Aberdeen Innovation Park	-	-	-	-	1.3	-	-	-	-	-	-	-	-	-
Sub Total	-	0.2	-	1.4	3.1	-	0.7	-	6.8	6.8	6.6	-	-	-
19. Dyce Drive (Morley)	-	-	-	3.8	-	-	-	-	-	-	-	-	-	-
20. Airport South West (Dyce Drive)	-	-	-	-	-	-	-	0.8	0.6	6.1	6.8	-	-	-
21. Farburn/Stoneywood	-	-	-	-	-	-	-	-	-	-	-	-	-	-
22. Kirkhill	-	-	-	0.9	-	-	-	-	-	-	-	-	-	-
23. Mugiemoss Road	-	-	-	-	-	-	-	-	-	-	-	-	-	-
24. Pitmedden Road	-	-	-	-	-	-	-	-	-	-	-	-	-	-
25. Pitmedden Road East	-	-	-	0.8	-	-	-	-	-	-	-	-	-	-
26. Raiths	-	-	-	-	-	-	0.6	-	-	-	-	-	-	-
27. Wellheads	-	-	-	-	-	0.9	-	-	-	-	-	-	-	-
28. Wellheads West	-	-	-	-	-	-	-	-	-	-	-	-	-	-
29. Rowett North	-	-	-	-	-	-	-	-	-	-	-	-	-	12.0
Sub Total	-	-	-	5.5	-	0.9	0.6	0.8	0.6	6.1	6.8	-	-	-
TOTALS	0.7	0.2	3.0	14.7	7.3	2.7	2.1	0.8	17.0	15.9	15.3	3.4	0	12

Appendix 5: Development Rates in Aberdeenshire 2005 - 2018/19 (all figures in hectares)

NB: The monitored period for the Employment Land Audit changed from a calendar year to April-March in 2009

Site Location	2005	2006	2007	2008	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Aberchirder	0	0	0	0	0	0	0	0	0	0	0	0	0.22	0
Balmedie	0	0.54	0	0	0	0	1.22	0	0	0	0	0	0	0
Banchory	0	0	0	0	0.63	3.26	0.93	0	0	0.1	0	0.1	0	0
Blackburn	0	0	0	0	0	0	0	0.76	2.13	0.35	0	0	0.3	0.37
Boyndie	0	0	0	0	0.78	0	1.94	3.29	0	3	0	0	0	0
Cuminestown	0	0	0	0	0	0	0	0	0	0	0	0	0.06	0
Edzell Woods													1.7	0
Ellon	0.43	0	5.63	0	0	1.79	1.38	1.86	2.18	0	1.1	1.07	2.29	0.9
Fraserburgh	0	0	0	0	0	0	0	0	2.96	0.85	1.32	0	0	0
Gourdon	0	0	0	0.44	0	0	0	0	0	0	0	0.24	0	0
Huntly	0	5.5	0	0	0	0	0	0.61	0	0	0	0.68	0	0.59
Insch	0	0	0.66	0	0	0	0.47	0.67	0	0.23	0	0	0.24	0
Inverurie	1.43	1.15	1.33	0	0	0	0	0.9	0	0	0	1.95	0	0
Kintore	0.24	0	1.12	0	2.7	0	7.79	2.06	2.99	1.48	0.95	1.16	4.9	0
Laurencekirk	0	0.08	0	0	0.4	0	0	0	0	0	0.15	0	0	0
Macduff	0.2	0	0	0	0	0	0.21	0	0	0	0.43	0	3.43	0.12
Marywell	0	0	3.2	1.27	0	2.36	0.28	0.28	0	0	0.62	4.23	0	0
Mintlaw	0	0	0	0	0	0	0	0.31	0	0	0	0	0.29	0
Newburgh	0	0	0.78	0.46	0.15	0	0.24	0	0	0	0	0	0	0
Oldmeldrum	1.46	0.36	0	0	0	0	0.31	2.81	1.9	0	0.4	0	0.72	0
Peterhead	4.99	0	0.2	0.65	0.1	0	1.44	1.09	0	2.81	0	0.28	0.91	0.41
Portlethen	0.8	10.6	1.2	0	0.7	0	0	0	0.39	4.32	3	3.1	0	0
Turriff	0.17	0	0	1.53	0	0	0	0	0	0	0	0	0	0
Westhill	0.91	4.1	0.6	14.71	3.12	0.32	2.5	2.71	1.53	2.96	1.05	1.4	0	1
Report Total:	10.63	22.33	14.72	19.06	8.58	7.73	18.71	17.35	14.08	16.1	9.02	14.21	15.06	3.39

Appendix 5: Details of Aberdeen City and Aberdeenshire Completions 2018/19

Site Ref	Site Name	Settlement	Plot Size (h)	Planning Permission	Description	Building size (sq m)
G/BB/E/004	Blackburn Industrial Estate	Blackburn	0.37	2014/1175	Erection of industrial unit (unit 2)	1366
F/EL/E/005	Ellon Commercial Park	Ellon	0.9	2016/2091	Erection of workshop and office building with yard	300
M/HT/E/002	Steven Road	Huntly	0.59	2017/0326	Erection of industrial workshop, office and yard	612
B/MC/E/001	Buchan Road East	Macduff	0.12	2017/1878	Erection of building for storage/repairs of stock cars (use class 5)	216
U/PH/E/004a	Dales Industrial Estate East	Peterhead	0.41	2017/3257	Extension to Spectrum House	450
G/WH/E/008	Arnhall Gateway - Unit 7	Westhill	0.6	2014/1065	Erection of industrial workshop and office	2078
G/WH/E/008	Arnhall Gateway - Unit 5	Westhill	0.12	2017/2784	Erection of building for food and drink (use class 3)	250
G/WH/E/008	Arnhall Gateway - Unit 6	Westhill	0.28	2017/2796	Erection of 5 individual workshops	1162
OP19	Rowett North	Aberdeen City	34.5	150826	12ha completed on Phase 1 2018/19	TECA 45000 sqm
						Subterranean space 33600 sqm
						Hotel 1 14600 sqm
						Hotel 2 6000 sqm
						Anaerobic Digestion Facility
						Landscaping and Parking



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