EMPLOYMENT LAND AUDIT 2014/15

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ABERDEEN CITY AND SHIRE
Strategic Development Planning Authority

EMPLOYMENT LAND AUDIT 2014/15

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 2014/15 Audit has a base date of 1st April 2015. 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

Please note that for this audit Aberdeen City Council have adjusted their figures to align with the approach of Aberdeenshire Council. This has involved an increase of 20% to show the gross figures for sites where it is not known how the site is to be developed, and has resulted in an overall increase in figures for this report.

Established Supply

Between April 2014 and April 2015 the established land supply has increased in the City by 14% bringing the total to 280ha (* see para 3.1.2). Over the past year, 16ha have been completed and a further 45ha are under construction, primarily at Dyce Drive adjacent to Aberdeen Airport and at Prime Four, Kingswells. Aberdeenshire has seen a reduction in the established supply of 2% to 581ha. Over the past year, 16ha have been built out and a further 7ha are under construction, with the majority of the activity taking place in Westhill, Kintore and Portlethen.

Constrained Supply

The constrained supply for Aberdeen City has increased by 25% from April 2014 to April 2015 (* see para 3.1.2). There are 111ha of constrained supply in Aberdeen which is 40% of its established supply. In Aberdeenshire, the constrained supply has increased slightly by 3% between April 2014 and April

2015 to 240ha, meaning that 41% 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

In Aberdeen City, the marketable land supply has seen a net increase of 21% between April 2014 and April 2015 to 169ha, of which 71ha are classed as immediately available (* see para 3.1.2). Significant areas of land have been developed or are under construction and other sites have entered the marketable supply for the first time this year at the Aberdeen Science and Innovation Parks and Findlay Farm. In Aberdeenshire, there was a decrease of 5% in the marketable supply over the year to 341ha, of which 60ha are classed as immediately available. Various sites have been taken up over the year, largely in the vicinity of Aberdeen.

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.

Figure 1: Employment Land Supply Aberdeen City and Shire, 2014/15

Market Activity [1]

In response to the fall in global oil prices, the energy industry has sought to consolidate operations and reduce overheads, resulting in job losses and a reduction in accommodation needs. The continuation of low oil price levels is expected to adversely affect demand into 2016 and possibly beyond for both new build developments and secondary property.

Looking back over 2014/15, there remained a steady take up of employment land in the City and in nearby Aberdeenshire towns. However, commitment would have been made to many of the new build premises recently built or currently under construction prior to the global fall in oil prices having taken effect. Over the period there has been a significant increase in the supply of both vacated secondary stock and excess space in new build premises that is no longer required, causing supply to outstrip demand, particularly in the office market.

In the City, the majority of the new build activity has taken place on allocated employment sites in the vicinity of Aberdeen Airport at Dyce Drive and at

[1] *Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2015 ; Ryden 76thd Scottish Property Review April 2015;*

Prime Four, Kingswells. In addition there are several large, high quality office developments recently completed or underway on brownfield sites close to the city centre in the North Dee Business Quarter, The Capitol, Union Street, as well as the Marischal Square mixed use development of high quality office, retail and leisure space which has also recently started construction.

In the Shire, the new build activity has been mainly concentrated in Westhill with the ongoing development of Kingshill and Silvertrees Business Parks, in Portlethen at Badentoy North and City South Business Parks, and in Kintore at Midmill.

Issues for the Future

Aberdeen City and Shire continues to be a world class centre of excellence for the global energy industry, but companies are increasingly able to locate in any global energy city. Ensuring that they choose Aberdeen will mean further investments and improvements to our transport infrastructure, housing, business space and social, cultural and leisure services. The Aberdeen Western Peripheral Route is now under construction which, when complete, will significantly improve road links from the south to the north and west of Aberdeen City and beyond into Aberdeenshire.

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 are closely linked to the fortunes of the oil and gas industry. Any adverse effect of the recent global decrease in oil prices on employment land demand has yet to be seen, but a future reduction is anticipated.

Land ownership can also be a significant constraint to the development of employment land, particularly if the land is owned by a developer for whom office and/or industrial space is not a priority compared to housing. However, the two local authorities see delivering employment space within large new developments as a vital part of ensuring mixed and sustainable communities.

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 Strategies and Policies

2.1.1 The updated **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 'Building on Success', the five-year **Economic Action Plan for Aberdeen City and Shire** was published by ACSEF in 2013 and sets out a vision for the region to work towards. It identifies seven strategic priorities to achieve economic growth and enhanced quality of life:

- Deliver a fully integrated transport network
- Deliver City Centre redevelopment
- Improve efficiency of planning decision making
- Attract, retain and develop skilled people
- Maximise intellectual capital
- Anchor the offshore energy supply chain
- Aberdeen City and Shire as location of choice for company headquarters

2.1.3 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, including carbon capture and storage technology focused on Peterhead.

2.1.4 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.

2.1.5 **The Regional Economic Strategy** will ensure a long term commitment to maintain and grow the economy across the North East of Scotland through four key strands: Investment in Infrastructure, innovation, inclusive economic growth and internationalisation. **Aberdeenshire Economic Development Strategy 2011-2016** aims to create the conditions for sustainable economic growth, diversification and regeneration within Aberdeenshire by attracting and supporting businesses and industries, and developing communities. **A Focused Regeneration Strategy for Aberdeenshire 2013-2018** identifies an Action Plan to work on a range of economic, environmental and social projects.The council's regeneration strategy prioritises the towns of Fraserburgh, Banff, Macduff and Peterhead.

2.1.6 The Energetica project aims to highlight attractive development propositions on residential and commercial sites along the A90 corridor from Bridge of Don in Aberdeen City, through Ellon, to Peterhead in Aberdeenshire. Energetica also includes development opportunities to the north of Aberdeen City from Bridge of Don to Aberdeen Airport.

2.1.7 The Scottish Government's planning policy for economic development was previously set out in **Scottish Planning Policy (SPP)** published in February 2010. This has now been reviewed, and a new SPP was adopted in June 2014, alongside NPF3. The SPP (2014) asks 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.

[2] *The UK Government's £1bn Carbon Capture and Storage Commercialisation Competition was cancelled in the Chancellor's Autumn Statement (Nov 2015). Peterhead Power Station was one of two bidders for support, with planning permission granted by Aberdeenshire Council for the project in June 2015.*

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 2014 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.

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

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 February 2012 and aims to maintain a ready supply of employment land in the right places to make sure Aberdeen retains its position as a competitive and sustainable business location. A large, phased allocation of employment land has thus been identified which will ensure the planning system does not act as a constraint to economic development.

2.3.3 The Aberdeenshire Local Development Plan was adopted in June 2012. 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 are included in the Employment Land Supply tables that can be found in Appendices 2 and 3. The audit supports the monitoring requirements of the two Local Development Plans.

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 will provide a base from which to build a larger creative sector which supports jobs and businesses, and improves the perceptions of Aberdeen.

2.3.6 Both Aberdeen City and Aberdeenshire are currently working on their proposed 2016 Local Development Plans.

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 defined by SPP. 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. For this report significant non-allocated brownfield development sites which have been granted consent for use classes 4, 5 or 6 have also been considered. While none were identified for inclusion in 2014/15, such sites will be recorded where appropriate in future reports. It provides a useful cross-check with Agents' Reviews and the Scottish Property Network regarding up-to-date information on sites and properties in the area and highlights areas where further work may be required. In addition, Aberdeen City Council publishes an office and hotel planning bulletin annually, 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 2014-2015 Aberdeen Industrial Areas Guide
2. The Aberdeenshire Business and Industrial Areas Guide 2014
3. The 2014 Scottish Annual Vacant and Derelict Land Survey (published February 2015)
4. The Aberdeen Vacant and Derelict Land Survey 2014 Report (see 'Other Related Information')
5. The Scottish Property Network
6. Scottish Assessors Grampian Valuation Roll
7. Aberdeen City Council Office and Hotel Planning Bulletins

3. EMPLOYMENT LAND AUDIT 2014/15

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. A meeting of the Employment Land Working Group is held in December each year to agree the figures contained in the audit and to discuss issues relating to the delivery of employment land in the region. The base date for the published data is 1 April 2015, and this audit has been titled 2014/15 to better reflect the period monitored which is 1 April 2014 to 31 March 2015. (Up until 2009, the base date for the audit had been 1 January each year and the period monitored covered a calendar year.)

3.1.2 For this audit Aberdeen City Council have adjusted their figures to align with the approach of Aberdeenshire Council. This has involved an increase of 20% to show the gross figures for sites where it is not known how the site is to be developed, and has resulted in an overall increase in figures for this report.

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.

Figure 2 - Aberdeen City and Aberdeenshire

3.3 Established Employment Land Supply

3.3.1 The established employment land supply for Aberdeen City and Aberdeenshire is shown in *Figure 3*.

Figure 3 - Established Employment Land Supply April 2014 and April 2015 (figures in hectares)

Employment Area	2014	2015	Change
Aberdeen City	246	280	14%
Aberdeenshire	593	581	-2%
TOTAL	**839**	**861**	**3%**

3.3.2 In **Aberdeen City** the level of established land supply has seen a net increase of 14% between April 2014 and April 2015 to 280ha (* see para 3.1.2). Over the past year 16ha have been completed and 45 ha are under construction, with large sites steadily progressing. 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 been a slight net decrease in the established land supply between 2014 and 2015 of 2% as land has been taken up. Completions in the past year covered 16 hectares and a further 7 hectares were under construction as at April 2015.

3.3.4 There has been a relatively small increase in the overall established employment land supply between April 2014 and April 2015 of 3%. There has continued to be significant activity and take up of land, mainly in and around the City, some of which remains under construction for a second year. In particular there has been rapid expansion of new business parks in the vicinity of Aberdeen Airport and Prime Four, Kingswells in the City. In Aberdeenshire there has also been significant office and industrial development at Westhill and Portlethen, although not on the same scale of take up in Aberdeen City.

3.3.5 Take up of quality land for new build development for the energy industry in Aberdeen City and the surrounding towns had remained high through 2014 and early 2015, despite the fall in oil prices. However commitment to these new build projects is likely to have been made prior to the downturn.

3.4 Constrained Employment Land Supply

3.4.1 Land that is subject to constraints in Aberdeen City and Aberdeenshire is shown in *Figure 4*.

Figure 4 - Constrained Employment Land Supply April 2014 and April 2015
(figures in hectares)

Employment Area	2014	2015	Change
Aberdeen City	89	111	25%
Aberdeenshire	234	240	3%
TOTAL	**323**	**351**	**9%**

3.4.2 There has been a 25% increase in the constrained land supply for **Aberdeen City** between April 2014 and April 2015, from 89ha to 111ha. This increase is largely attributable to the gross figures being used for this audit for Aberdeen City (* see para 3.1.2). This equates to 40% 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 Countesswells. 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 this audit.

3.4.3 The amount of constrained land in **Aberdeenshire** has increased slightly to 240ha, and makes up 41% of its established supply. A number of mixed use LDP sites are regarded as constrained, either because they do not yet have agreed masterplans or because the planned phasing means the employment land element is not expected to be developed within five years of the base date of the audit. Other sites have significant infrastructure issues to overcome. The relatively high supply of constrained employment land in the Shire compared to the City can be partly attributed to the inclusion of an allocation of 100ha at the former Edzell Air Base (on the southern Aberdeenshire border with Angus), which has a disproportionate impact on the overall total.

3.5 Marketable Land Supply

3.5.1 The marketable land supply in 2015 is shown in *Figure 5.* These figures count land which is both immediately available and land which is not immediately available but does not face any constraints to development and could come forward within 5 years.

Figure 5 - Marketable Land Supply April 2014 and April 2015 (figures in hectares)

Employment Area	2014	2015	Change
Aberdeen City	140	169	21%
Aberdeenshire	360	341	-5%
TOTAL	**500**	**510**	**2%**

3.5.2 The marketable land supply in **Aberdeen City** has increased by a net amount of 21% to 169ha. Areas of land have been taken up or are under construction, and other sites have entered the marketable supply but the increase is largely attributable to the gross figures being used for this audit for **Aberdeen City** (* see para 3.1.2). In particular, Findlay Farm and the class 4 restricted Scottish Enterprise sites, at Aberdeen Science and Energy Park and Aberdeen Innovation Park, are now included. In **Aberdeenshire** there has been a decrease of 5% in the marketable supply of land, mainly attributable to the take up of land.

3.5.3 The supply of marketable land in **Aberdeen City** and key **Aberdeenshire** settlements is 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 Local Development Plans in 2012, and 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 over 13ha at Prime Four, Kingswells available for high quality business use. In Aberdeenshire 5ha sites are available specifically for high quality business use/company headquarters at both Inverurie and Chapelton of Elsick. In addition, other sites in and around Aberdeen are attracting 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 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 taken up at a slower rate.

3.6 Immediately Available Land Supply

3.6.1 The immediately available land supply for 2015 is shown in *Figure 6*.

Figure 6 - Immediately Available Land Supply April 2014 and April 2015 (figures in hectares)

Employment Area	2014	2015	Change
Aberdeen City	66	71	8%
Aberdeenshire	40	60	50%
TOTAL	**106**	**131**	**24%**

3.6.2 The supply of immediately available land in Aberdeen City has increased by 8% to 71ha in April 2015. Sites, such as ABZ, Aberdeen International and Prime Four, have progressed but the small increase is attributable to the gross figures being used for Aberdeen City (* see para 3.1.2).

3.6.3 In Aberdeenshire there has been a significant net increase of 50% in the supply of immediately available land to 60ha. This is attributable to large sites rapidly coming forward into the immediately available supply over the past year at Westhill and Portlethen.

3.6.4 Overall some 54% of all immediately available land is currently located within Aberdeen City and 46% within Aberdeenshire. 25% of the established supply of land in Aberdeen City is immediately available compared with 10% in Aberdeenshire, reflecting the stronger demand in the City and continued rapid progress on sites during 2014/15. Over two thirds (42ha) of the immediately available land in

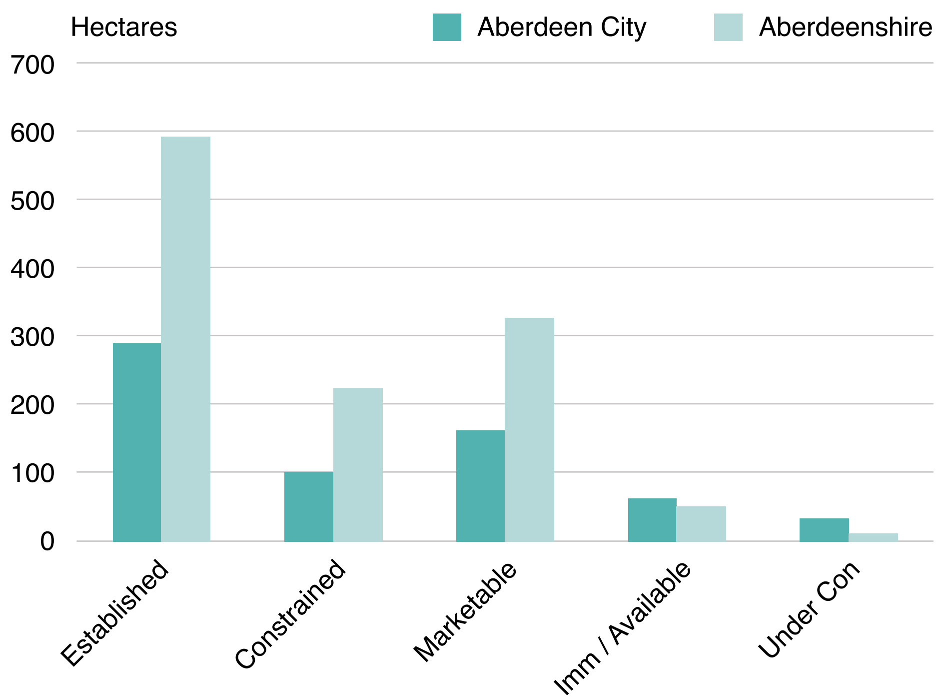
Aberdeenshire is situated within an 18 mile radius of Aberdeen.

3.6.5 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 2015 there were 45 hectares of employment land under construction in Aberdeen and 7 hectares of land under construction in Aberdeenshire.

3.6.6 *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 2015

4.1 Employment Land Take-Up and Market Activity[3]



4. ANALYSIS OF TRENDS

4.1.1 In 2014/15, 16ha of employment land was developed in Aberdeenshire, slightly above an average development rate of 15ha per year for the past 10 years. A further 7ha are currently under construction (April 2015). In Aberdeen City, 16ha of land has been completed over the past year and a further 45ha are currently under construction (April 2015).

4.1.2 Over the period April 2014 to March 2015 the price of Brent Crude had dropped dramatically from over $100 per barrel to around $55 per barrel, and has continued to remain low. In response, the oil and gas industry has been seeking to consolidate and reduce overheads, which has resulted in job losses and a reduction in accommodation needs. As a consequence, a reduction in demand levels for new build development in 2016 and possibly beyond is anticipated. However, there is inevitably a time lag involved in the planning and decision making process for new build projects and the effect of changing economic conditions in the oil and gas industry. Local agents report that demand in respect of the secondary markets for office and industrial property is already adversely affected, where supply now exceeds demand.

4.1.3 During 2014/15, a good level of employment land take up had continued for new build developments in both the City and in nearby Aberdeenshire towns, despite the fall in oil prices. The oil and gas industry had continued to seek out modern high quality accommodation, although commitment to these projects will often have been made prior to the change in circumstances within the industry caused by the fall in oil price. This situation is reflected in the continued healthy take up of employment land over the period.

4.1.4 Within Aberdeenshire the majority of the new build development has

[3] *Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2015 ; Ryden 76th Scottish Property Review April 2015; FG Burnett Property Matters Issue 2 January 2015*

taken place on LDP employment land sites at Westhill, Portlethen and Kintore. At Westhill there has been continued expansion of the Kingshill and Silvertrees Business Parks at Arnhall. At Portlethen there has been expansion to the north of the Badentoy Industrial Estate, where the construction of an access road has opened up land for further development. In addition, high quality office space has been constructed on part of the City South Business Park at Portlethen. The first phases of the Midmill Business Park development at Kintore are now virtually complete, and adjacent land is available for further expansion. In contrast, there has been only a very small amount of employment land take up in the regeneration areas of Fraserburgh, Peterhead, Macduff and Banff in the north of Aberdeenshire.

4.1.5 In Aberdeen, significant new build development has taken place on the LDP employment land sites towards the edges of the city, such as Aberdeen International, ABZ, Prime Four and Gateway Business Parks. However, there are also a number of high quality office developments on brownfield sites in the city centre that have been recently completed or are currently under construction. These sites had not been previously counted in the marketable supply:

Figure 8: Brownfield Sites Aberdeen City

Address	Development	Site Size	Status
Former Aberdeen Seafood Park, Palmerston Road (North Dee Business District)	Offices Grade A 13,600 sq.m	0.415 hectares	Completed June 2015
Ardent House, North Esplanade West (North Dee Business Quarter)	Offices 21,101 sq.m	1.17 hectares	Under construction
Liberty House, Palmerston Place (North Dee Business District)	Offices	0.12 hectares	Under construction
The Capitol, 431 Union Street	Offices	0.18 hectares	Under construction
Marischal Square, Broad Street	Mixed use including 14,264 sq.m offices	1.73 hectares	Under construction

4.1.6 Aberdeen City and Shire continues to be a world class centre of excellence for the global energy industry, however companies are increasingly able to be located in any global energy city. Ensuring they choose Aberdeen will mean further investment and improvements to our transport infrastructure, housing, business space and social, cultural and leisure services. The Aberdeen Western Peripheral Route is now under construction which, when complete, will significantly improve links from the south to the north and west of Aberdeen City and beyond into Aberdeenshire.

4.2 Office Space - Market Activity

4.2.1 Local agents have noted that the market balance in Aberdeen had switched over 2014/15 as increased supply met a decrease in demand from the dominant oil and gas industry in view of the decline in oil prices. The overall supply of office space in Aberdeen had increased significantly over the year by 56% to 133,600 sqm (1.4million sqft) as at April 2015. However, this has been largely in the secondary market and there has continued to be take up of new build office accommodation. Some companies have still committed to significant relocations despite the low oil price but have placed any excess accommodation in these new buildings on the market in addition to the secondary buildings that they have vacated. Office rental levels are reported to have remained strong but increased incentive packages have been offered to reflect the shift in supply and demand.

City Centre speculative development has been continuing, such as The Capitol, Union Street due to complete early next year and work has started on the Marischal Square development due to complete in 2017. To the west and south of the City, demand for new accommodation had continued to be strong at Prime Four, Kingswells, Kingshill Business Park, Westhill and City South, Portlethen.

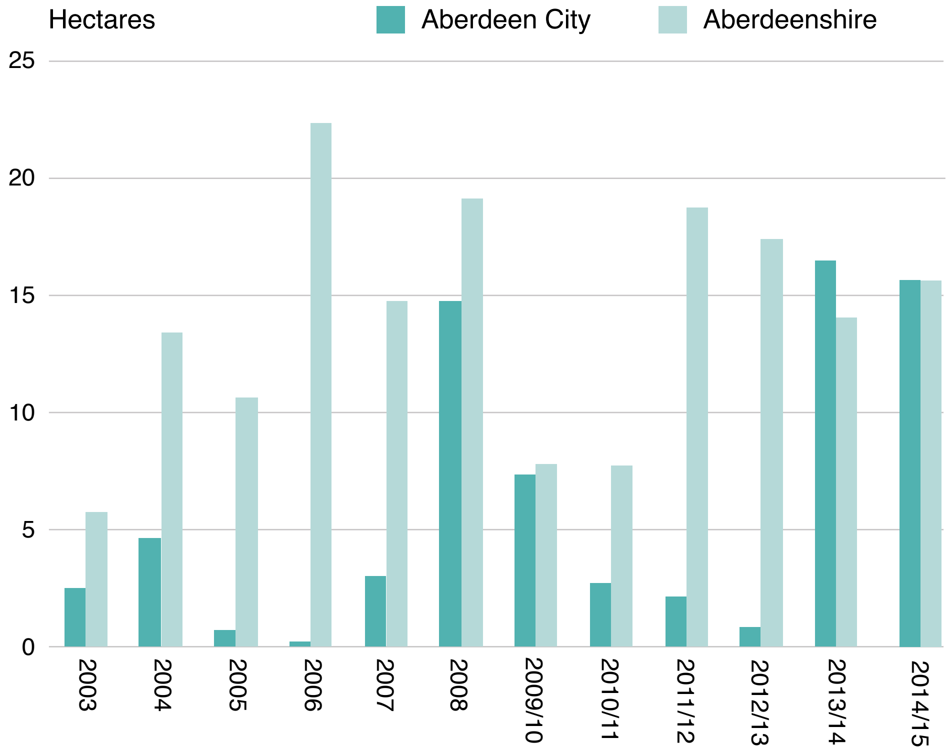
4.3 Industrial Space - Market Activity

4.3.1 Local agents have noted that general demand for industrial property in and around Aberdeen had also eased over 2014/15 due to the fall in oil prices, but the demand versus supply switch was less dramatic than in the office market. Despite tougher market conditions, it was evident that the vast majority of occupiers still preferred more modern or new build properties, which better suit their needs in terms of eaves height, capacity for overhead cranes and high specification offices.

A large proportion of the secondary stock available is considered obsolete because it no longer meets the needs of occupiers. For this reason developers in and around Aberdeen had still undertaken speculative new build projects in 2014/15, for example at ABZ Business Park, Dyce and Kingshill Commercial Park, Westhill, although they may now experience more difficulty in attracting suitable tenants. A number of other pre-let industrial schemes are also under construction and rental levels are reported to have remained strong over the period.

4.4 Trends in Employment Land

Figure 9 - Employment Land Development Rates 2003-2014/15



4.4.1 *Figure 9* shows that Aberdeenshire has dominated the take-up of employment land in recent years, although this changed in 2013/14 with a substantial rise in take up in Aberdeen City where rapid development had taken place on many of the large employment sites allocated in the LDP. NB: The monitored period for the Employment Land Audit changed from a calendar year to April-March in 2009.

Figure 10: Trends in Marketable Employment Land in Aberdeen City and Shire 2004-2015

4.4.2 Figure 10 shows that both Aberdeenshire and Aberdeen City had a steady amount of marketable land supply up until the 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. The increase for Aberdeen City in 2015 is largely attributable to the gross figures being used for this audit (*see para 3.1.2).

4.4.3 Figure 11 shows the dramatic fall in the price of Brent Crude from the second half of 2014, the effects of which have yet to manifest in terms of the rate of take up of employment land in Aberdeen City and Aberdeenshire. However, local agents have reported an oversupply of both office and industrial space in the secondary market and demand for new build development is expected to reduce in the near future as the energy industry continues to consolidate in response to the prevailing low oil price.

Figure 11: Europe Brent Crude Price October 2005 – October 2015

Source:eia.gov (US Energy Information Administration)

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 (Const)

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).

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 (Estab)

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 (Imm/Avail)

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 (Market)

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 (Ser)

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

Under Construction (UC)

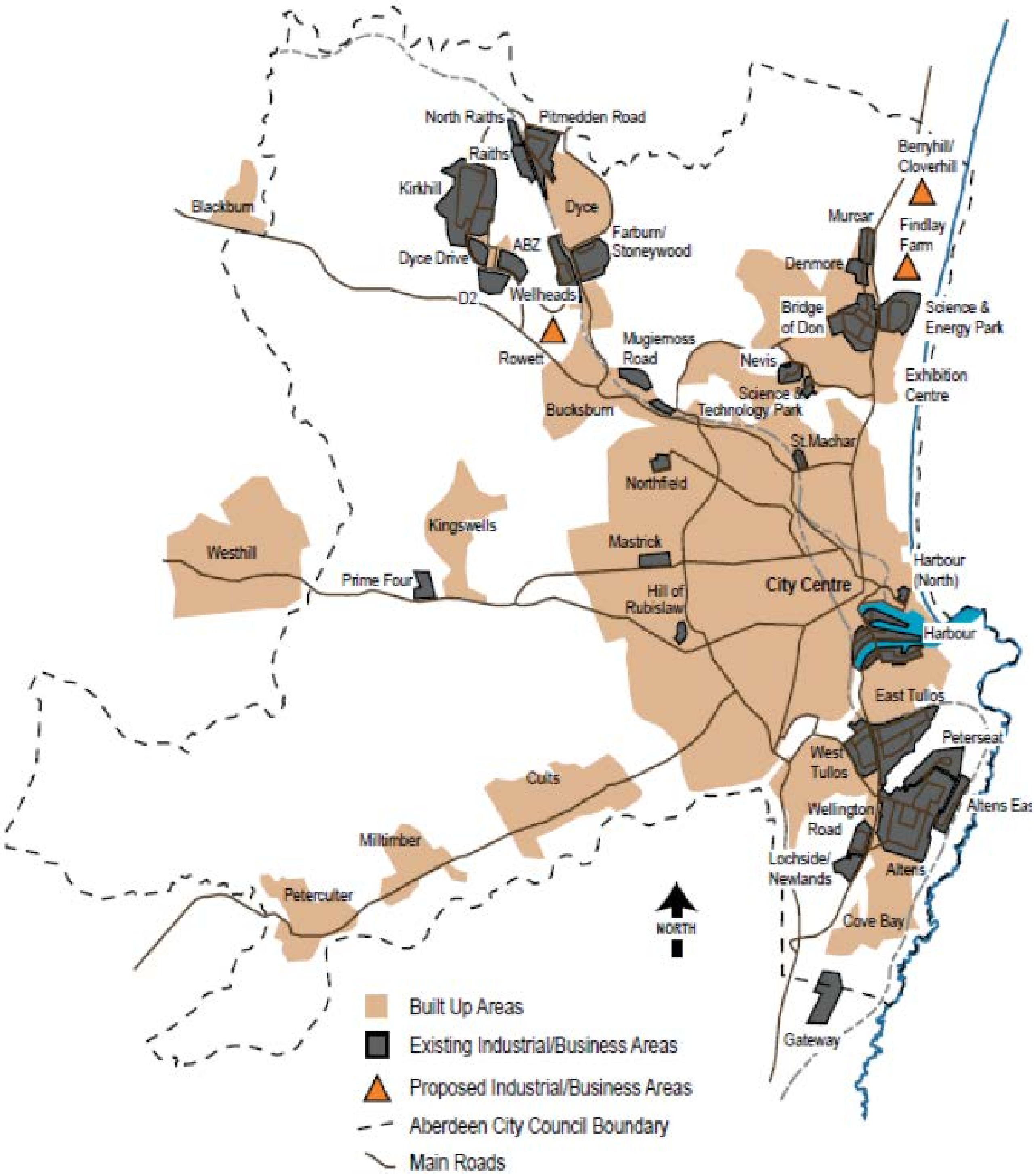
The area of land under construction but not yet complete. This land is not included within the land supply totals.

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

LOCATION	DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Altens (38a Hareness Road)	Private	None	Yes	0	0	0	0	0
Lochside/Newlands (Balmoral Business Pk)	Balmoral Group	None	Yes	2.2	0	2.2	2.2	1.9
Aberdeen Gateway	Halladale Muir		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	Esson Properties	Part Planning Constraint	Part	11.0	2.9	8.1	8.1	0
Aberdeen Science & Energy Park	Scottish Enterprise	Class 4 Only	Yes	1.5	0	1.5	0	0
Aberdeen Innovation Park	Scottish Enterprise	Class 4 Only	Yes	3.0	0	3.0	0	0
Findlay Farm	Aberdeen Science Parks LP	None	No	16.4	0	16.4	16.4	0
The Core Berryhill/Cloverhill	Private		No	68.4	0	68.4	0	0
Airport Dyce Drive	Miller, Abstract, ABZ Development Ltd	Ownership & Infrastructure	Part	68.7	30.1	38.6	29.9	30.1
Dyce Drive, 9 Dyce Avenue	Morley		Yes	1.1	0	1.1	1.1	0
Raiths, Dyce (Kirkton Drive)	Private		Yes	1.5	0	1.5	1.5	0
Wellheads West	Private	Noise & Height Restrictions	Yes	0.9	0	0.9	0.9	0
OP12 Grandhome	Grandhome Trust		No	5.0	5.0	0	0	0
OP26 Craibstone North & Walton Farm	Private		No	1.5	1.5	0	0	0
OP28 Rowett North	Private		No	34.5	34.5	0	0	0
Prime Four	Drum		Part	16.5	0	16.5	0	13.2
OP45 Greenferns	ACC		No	10.0	10.0	0	0	0
OP46 East Arnhall	Private		No	1.0	1.0	0	0	0
OP58 Countesswells	Countesswells Consortium		No	10.0	10.0	0	0	0
O62 Oldfold	CALA		No	5.0	5.0	0	0	0
OP77 Loirston	Private		No	11.0	11.0	0	0	0
			Total	**280.2**	**111.0**	**169.2**	**71.1**	**45.2**



Aberdeen City Industrial and Business Areas 2014-15

From Aberdeen City Council Industrial Areas Guide 2014-2015

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

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
BANFF AND BUCHAN											
Aberchirder	B/AB/E/001	Cornhill Road	BUS1	Aberdeenshire Council		Part	1	0	1	0	0
Cairnbulg/ Inverallochy	B/CI/E/001	Cairnbulg Harbour	E1	Private	Other	Yes	0.5	0.5	0	0	0
Fraserburgh	B/FR/E/002	West Shore	BUS1	Aberdeenshire Council		Yes	0.3	0	0.3	0.3	0
Fraserburgh	B/FR/E/003a	Fairney Hill Business Park Ph 2		Aberdeenshire Council		No	1.9	0	1.9	0	0
Fraserburgh	B/FR/E/003b	Chapelhill Rosehearty/ Watermill	BUS2	Private	Infrastructure	Part	10.1	10.1	0	0	0.4
Fraserburgh	B/FR/E/007	Fairney Business Park	BUS1	Aberdeenshire Council		Yes	1.2	0	1.2	1.2	0.9
Fraserburgh	B/FR/E/008	Phingask	E1	Private	Physical, Marketability	No	16.5	16.5	0	0	0
Fraserburgh	B/FR/E/009	Kirkton Development	M1	Private	Infrastructure	No	4	4	0	0	0
Inverboyndie	B/IB/E/002	Inverboyndie- Phase 1	BUS1	Private		Yes	1.4	0	1.4	1.4	0
Inverboyndie	B/IB/E/003	Inverboyndie- Phase 2	BUS1	Private		No	1.4	0	1.4	0	0
Macduff	B/MC/E/003	Tarlair Business Park	BUS2	Aberdeenshire Council		Yes	4.9	0	4.9	4.9	0
Macduff	B/MC/E/004	Buchan Road- West	BUS2	Private	Ownership	No	4.00	4.00	0	0	0
Macduff	B/MC/E/005	Green Hills	E1	Private		No	12	0	12	0	0
Rosehearty	B/RH/E/001	South of Ritchie Road	M1	Private	Infrastructure	No	2	2	0	0	0
						BANFF AND BUCHAN TOTAL	**61.2**	**37.2**	**24.0**	**7.8**	**1.3**
BUCHAN											
Ardallie	U/AD/E/001	Ardallie ALDP M1 (Land at Nether Backhill)	M1	Private		No	0.3	0	0.3	0	0
Auchnagatt	U/AG/E/001	Auchnagatt ALDP M1 (Adj A948)	M1	Private		No	0.5	0	0.5	0	0
Crimond	U/CM/E/001	Crimond ALDP E1	E1	Private		No	6	0	6	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Cruden Bay	U/CR/E/001	Cruden Bay ALDP M1 (Land West of Golf Road)	M1	Private	Other	No	2	2	0	0	0
Hatton	U/HT/E/001	Hatton ALDP E1	E1	A Wyness & Sons		No	0.8	0	0.8	0	0
Longside	U/LG/E/001	Longside - Inverquhomery Road	BUS1	Private		No	1.2	0	1.2	0	0
Longside	U/LG/E/002	Longside ALDP M1	M1	Chap Homes		No	1.7	1.7	0	0	0
Mintlaw	U/ML/E/003	Mintlaw - Aden Business Park	BUS1	Aberdeenshire Council		No	0.9	0	0.9	0	0
Mintlaw	U/ML/E/005	Mintlaw ALDP M1 (Nether Aden)	M1	Bancon Homes	Other	No	5	5	0	0	0
Peterhead	U/PH/E/002	Peterhead - Balmoor	BUS2	Aberdeenshire Council		Yes	2.1	0	2.1	0.7	0
Peterhead	U/PH/E/003	Peterhead - Dales Industrial Estate West	BUS3/BUS4	Aberdeenshire Council		Part	9.5	1.9	7.6	2.8	0
Peterhead	U/PH/E/004a	Peterhead - Dales Industrial Estate East	BUS4	Private		Part	1.7	0	1.7	1.7	0.8
Peterhead	U/PH/E/005a	Peterhead - Damhead/ Upperton Industrial Estate North	BUS4/BUS6	Private		Part	3.9	0	3.9	0	0
Peterhead	U/PH/E/006	Peterhead - Energetica Industry Park (Upperton Ind Est)	BUS6/BUS7	Scottish Enterprise		No	16.6	0	16.6	0	0
Peterhead	U/PH/E/007	Peterhead - Wellbank	BUS5	Score Group Ltd		Part	26.9	0	26.9	0	0
Peterhead	U/PH/E/008	Peterhead - Invernettie Roundabout/South Road		Private		Part	0.4	0	0.4	0.4	0
Peterhead	U/PH/E/009	Peterhead ALDP M1 (Waterside)	M1	Private	Other	No	4	4	0	0	0
Peterhead	U/PH/E/010	Peterhead ALDP E1 (Wellbank)	E1	Score Group Ltd		No	12.3	0	12.3	0	0
						BUCHAN TOTAL	**95.8**	**14.6**	**81.2**	**5.5**	**0**

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
FORMARTINE											
Balmedie	F/BA/E/001	Eigie Farm South	M1	Aberdeenshire Council		No	5.4	2.6	2.8	2.8	0
Blackdog	F/BD/E/001	Blackdog	M1	Private	Infrastructure, Other	No	4	4	0	0	0
Cuminestown	F/CT/E/001	Cuminestown Industrial Estate	BUS1	Aberdeenshire Council	Marketability, Other	No	0.5	0.5	0	0	0
Ellon	F/EL/E/005	Balmacassie South	BUS1			Yes	5.3	0	5.3	5.3	1.1
Ellon	F/EL/E/006	Cassiegills	E1	Private		No	9	0	9	0	0
Ellon	F/EL/E/007	Cromleybank	M1	Scotia Homes	Other	No	2	2	0	0	0
Foveran	F/FV/E/001	South of Westfield	M1	Harper & Cochrane Ltd		No	2	0	2	0	0
Foveran	F/FV/E/002	Roadside Croft	E1	Private		No	1.5	0	1.5	0	0
Newburgh	F/NB/E/002	Loanhead Phase 2	BUS1	Private		No	2.0	0	2.0	0	0
Newburgh	F/NB/E/007	East of Parkview	M1	Private		No	1.5	0	1.5	0	0
Oldmeldrum	F/OM/E/003b	Oldmeldrum Business Park/ Meadows Industrial Estate	BUS2	Private		Part	3.2	0	3.2	3.2	0.4
Oldmeldrum	F/OM/E/005	North of Meldrum Academy	M2	Private	Other	No	2.1	2.1	0	0	0
Pimedden	F/PM/E/001	Milldale East	BUS2	Private	Ownership, Infrastructure	No	1.6	1.6	0	0	0
Rothienorman	F/RO/E/002	Rothienorman West of B9001	BUS1	Private	Marketability	No	1.2	1.2	0	0	0
Rashiereive	F/RR/E/001	West of Rashiereive Cottages	E1	Private		No	2	0	2	0	0
Turriff	F/TF/E/001	Markethill North	BUS1	Aberdeenshire Council		Yes	0.2	0	0.2	0.2	0
Turriff	F/TF/E/004	East of Markethill Industrial Estate	BUS1	Private		No	2.0	0	2.0	0	0
Turriff	F/TF/E/005	South of Markethill Road	BUS1		Ownership	Yes	0.7	0.7	0	0	0
Turriff	F/TF/E/007	Markethill Crofts North	E1	Private		No	1	0	1	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Turriff	F/TF/E/008	Markethill Crofts East	E2	Private		No	1.7	0	1.7	0	0
Turriff	F/TF/E/009	Broomhill Road	E3	Private		No	4.5	0	4.5	0	0
Turriff	F/TF/E/010	Balmellie Crofts	M1	Private	Other	No	10	10	0	0	0
Tarves	F/TV/E/003	Braiklay Cottages	M1	Private	Other	No	3	3	0	0	0
Udny Station	F/US/E/001	East of Woodlea Grove	M1	Private	Ownership	No	1	0	1	0	0
Westfield	F/WF/E/001	Westfield Foveran	E1	Private		No	2	0	2	0	0
						FORMARTINE TOTAL	**69.4**	**27.7**	**41.7**	**11.5**	**1.5**
GARIOCH											
Blackburn	G/BB/E/004	Blackburn - Kinellar Business Park	BUS	Private		Part	1.0	0	1.0	1.0	0
Insch	G/IS/E/005	Insch - Muiryheadless	BUS	Aberdeenshire Council		Yes	2.1	0	2.1	2.1	0
Insch	G/IS/E/006	Insch - South of Muiryheadless	BUS	Private	Ownership	No	2.2	2.2	0	0	0
Insch	G/IS/E/007	Insch ALDP E1	E1	Private		No	5	0	5	0	0
Inverurie	G/IV/E/005c	Port Elphinstone North	BUS6	Private	Contamination	No	2.5	2.5	0	0	0
Inverurie	G/IV/E/008	Inverurie - Fairholme/ Highclere	BUS3	Private		Yes	1.3	0	1.3	1.3	0
Inverurie	G/IV/E/009	Inverurie East	BUS11		Other	No	0.7	0.7	0	0	0
Inverurie	G/IV/E/012	Inverurie ALDP M2	M2	Private/Aberdeenshire Counci		No	0.5	0	0.5	0	0
Inverurie	G/IV/E/013	Inverurie ALDP E1	E1	Crichie Dev Ltd/Dandara		No	15.5	0	15.5	0	0
Inverurie	G/IV/E/014	Inverurie ALDP E2	E2	ANM Group Ltd		No	1.5	0	1.5	0	0
Inverurie	G/IV/E/015	Inverurie ALDP E3	E3	ANM Group Ltd		No	10.0	0	10.0	0	0
Inverurie	G/IV/E/016	Port Elphinstone	BUS7	Kilbride Resources Ltd		No	2.5	0.0	2.5	0	0
Iverurie	G/IV/E/017	Inverurie - Crichiebank Business Centre	BUS5	Private		Part	1.1	0	1.1	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Kemnay	G/KM/E/002	Kemnay - Dalmadilly	BUS1	Private	Ownership	No	4.3	4.3	0	0	0
Kemnay	G/KM/E/004	Kemnay East	BUS2	Private		Part	2.8	0	2.8	0	0
Kingseat	G/KTS/E/001x	Kingseat	BUS1	Manor Kingdom	Land Use	Part	1.0	1.0	0	0	0
Kintore	G/KT/E/002	Kintore - Midmill North	BUS3	Private		Yes	0.9	0.0	0.9	0.9	0
Kintore	G/KT/E/002a	Kintore - Midmill South	BUS4/M1			Yes	0	0	0	0	1.0
Kintore	G/KT/E/002b	Kintore North/Bridgend	BUS2	Private	Physical	No	5	2.5	2.5	0	0
Kintore	G/KT/E/003b	Kintore Business Park	BUS1	Private		Yes	0.6	0	0.6	0	0
Kintore	G/KT/E/004	Kinore ALDP M1	M1	Kintore Consortium		No	5.0	0	5.0	0	0
Millbank	G/MB/E/003	Millbank Mixed Use Site M1	M1	Cluny Estates	Infrastructure	No	1.3	1.3	0	0	0
Newmachar	G/NM/E/003	Newmachar ALDP E1	E1	Kirkwood Homes		No	5	0	5	0	0
Westhill	G/WH/E/007	Westhill - Arnhall Business Park Ph2	BUS	Private		Yes	1.6	0	1.6	1.6	0
Westhill	G/WH/E/008	Westhill ALDP E1	E1	Westhill Dev Co Ltd		Part	6.7	0	6.7	6.7	0.8
						GARIOCH TOTAL	**80.00**	**14.5**	**65.5**	**13.6**	**1.8**
KINCARDINE AND MEARNS											
Auchenblae	K/AU/E/001	Auchenblae ALDP M1 (Hillview)	M1	Kincardineshire Investment Co	Other	No	1	1	0	0	0
Drumlithie	K/DL/E/001	Drumlithie ALDP M1 (Land Adj Bowling Green)	M1	Peterkin Homes Ltd		No	0.5	0	0.5	0	0
Chapleton of Elsick	K/EL/E/001	Chapleton of Elsick - New Settlement ALDP M1	M1	Elsick Dev Co Ltd		No	11.5	0	11.5	0	0
Edzell Woods	K/EW/E/001	Edzell Woods ALDP M1 (Former Edzell Airfield)	M1	Carnegie Base Services	Marketability, Infrastructure	No	100	100	0	0	0
Gourdon	K/GD/E/001	Gourdon Business Park	BUS	Aberdeenshire Council		Yes	1.5	0	1.5	1.5	0
Gourdon	K/GD/E/002	Gourdon ALDP E1	E1	Private		No	3	0	3	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Laurencekirk	K/LK/E/004	Laurencekirk - Mart Site West		Aberdeenshire Council		Yes	0.3	0	0.3	0.3	0
Laurencekirk	K/LK/E/005	Laurencekirk ALDP M1 (Conveth Mains)	M1	Kirkwood Homes		No	11	0	11	0	0
Luthermuir	K/LM/E/001	Luthermuir ALDP M1	M1	Private	Other	No	0.3	0.3	0	0	0
Luthermuir	K/LM/E/002	Luthermuir ALDP M2	M2	Private	Other	No	0.3	0.3	0	0	0
Marykirk	K/MK/E/001	Marykirk ALDP M1 (West Park)	M1	Private		No	0.5	0	0.5	0	0
Newtonhill	K/NH/E/001	Newtonhill - West Monduff Farm	BUS	A&D Developments (Scotland) Ltd		No	7.2	0	7.2	0	0
Newtonhill	K/NH/E/002	Newtonhill ALDP E1	E1	Elsick Dev Co Ltd		No	11.5	0	11.5	0	0
Portlethen	K/PL/E/004	Portlethen - Badentoy Industrial Park	BUS1	Badentoy Developments Ltd		Yes	11.5	0	11.5	4.2	0
Portlethen	K/PL/E/005	Portlethen - City South Business Park	BUS2	Dandara		No	10.6	0	10.6	10.6	1.5
Portlethen	K/PL/E/006	Portlethen - Mains Of Cairnrobin	BUS	Private		No	37	37	0	0	0
Portlethen	K/PL/E/007	Portlethen - Moss Side	BUS	Private		Part	2.5	0	2.5	0	0.6
Portlethen	K/PL/E/008	Portlethen ALDP E1	E1	Private		No	6.5	0	6.5	0	0
Portlethen	K/PL/E/009	Porthlethen ALDP E2	E2	Private		No	7	0	7	0	0
St Cyrus	K/SC/E/001	St Cyrus/Lochside ALDP M1 (Adjacent A92)	M1	Private		No	2	0	2	0	0
Stonehaven	K/ST/E/003	Stonehaven - East Newtonleys	BUS2	Bancon Developments		No	11.31	0	11.31	0	0
Stonehaven	K/ST/E/004	Stonehaven ALDP E2	E2	Bancon Developments		No	7	0	7	0	0
Stonehaven	K/ST/E/005	Stonehaven ALDP E1	E1	Private		No	1	0	1	0	0
						KINCARDINE AND MEARNS TOTAL	**244.8**	**138.5**	**106.3**	**16.5**	**2.1**
MARR											
Aboyne	M/AB/E/004	Aboyne West	M1	Private	Other	No	1	1	0	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Alford	M/AF/E/002b	Alford Business Park	M2	Kirkwood Homes		No	1.1	0	1.1	0	0
Alford	M/AF/E/003	Academy Site	M1	Aberdeenshire Council	Ownership	Yes	1.2	1.2	0	0	0
Banchory	M/BN/E/002	Hill of Banchory	BUS1	Bancon Developments		Yes	6.0	0	6.0	4.4	0.1
Banchory	M/BN/E/003	Burn O'Bennie	BUS2	Bancon Developments		No	2.2	0	2.2	0	0
Banchory	M/BN/E/004	Lochton of Leys	M2	Private	Other	No	2	2	0	0	0
Huntly	M/HT/E/002	Depot Road	BUS2	RB Farquhar		Yes	0.9	0	0.9	0.9	0
Huntly	M/HT/E/004a	Muckle Torry Hillock North	BUS1	Private		No	1.8	0	1.8	0	0
Huntly	M/HT/E/005	Mart	BUS3	Private		No	3.3	0	3.3	0	0
Huntly	M/HT/E/006	Adj Linnorie	E1	Private		No	4.5	0	4.5	0	0
Kennethmont	M/KM/E/001	Opposite School	E1	Private		No	0.6	0	0.6	0	0
Kincardine O'Neil	M/KN/E/001	Dee Street	M1	Private	Other	No	0.8	0.8	0	0	0
Kincardine O'Neil	M/KN/E/002	Willowbank	E1		Ownership	No	0.8	0.8	0	0	0
Lumsden	M/LD/E/002	Lumsden	BUS	Private		No	0.3	0	0.3	0	0
Muir of Fowlis	M/MF/E/001	Muir of Fowlis	BUS	Private		No	0.3	0	0.3	0	0
Rhynie	M/RN/E/001	Rhynie Richmond Avenue East	BUS	Aberdeenshire Council		Yes	0.2	0	0.2	0.2	0
Rhynie	M/RN/E/002	Rhynie Richmond Avenue West	M1	Private	Other	No	0.6	0.6	0	0	0
Tarland	M/TL/E/002	Burnside Road	M1	Private	Other	No	1	1	0	0	0
Torphins	M/TP/E/001	South of A980	BUS	Private		No	1.2	0	1.2	0	0
						MARR TOTAL	**29.7**	**7.4**	**22.3**	**5.5**	**0.1**
						REPORT TOTAL	**580.9**	**239.9**	**341.0**	**60.4**	**6.8**

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

SETTLEMENT	ESTAB	CONST	MARKET	IMM/AVAIL	UC
STRATEGIC GROWTH AREAS					
Ellon-Blackdog	33.2	8.6	24.6	8.1	1.1
Peterhead-Hatton	78.2	5.9	72.3	5.5	0
Total	**111.4**	**14.5**	**96.9**	**13.7**	**1.1**
Huntly-Pitcaple	19.7	2.2	17.5	3	0
Inverurie-Blackburn	48	5.7	42.3	3.2	1
Total	**67.7**	**7.9**	**59.8**	**6.2**	**1**
Portlethen-Stonehaven	124.5	37	87.5	14.8	2.1
Sth of Drumlithie-Laurencekirk	11.3	0	11.3	0.3	0
Total	**135.8**	**37.0**	**98.8**	**15.1**	**2.1**
Aberdeen HMA Local Growth	37	13.3	23.8	11.5	1.2
Rural HMA Local Growth	228.9	167.2	61.8	14	1.4
Report Total	**580.9**	**239.9**	**341.0**	**60.4**	**6.8**
Report Total	**593.44**	**233.86**	**359.58**	**39.68**	**10.63**

REGENERATION PRIORITY AREAS					
Regeneration Priority Area	143.5	43.1	100.4	13.3	1.3
Outwith Regeneration Priority Area	437.4	196.8	240.6	47.1	5.5
Report Total	**580.9**	**239.9**	**341.0**	**60.4**	**6.8**

Strategic Growth and Regeneration Priority Areas in Aberdeenshire

APPENDIX 5: Development Rates in Aberdeen City (all figures in hectares)

Tables include only completed developments and exclude extensions to existing sites - see ‘Development Rates’ definition in *Appendix 1.*

SITE LOCATION	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
1 Altens	-	-	-	0.6	-	-	-	-	-	-	3.0	-	-	-	-	-	0.9
2 Altens East	-	-	-	-	-	-	2.6	-	-	0.6	2.4	2.3	-	0.8	-	-	-
3 East Tullos/Redmoss	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
4 Lochside/Newlands	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1.9	-
5 Peterseat	-	-	-	1.2	2.0	1.3	-	-	-	2.4	2.4	-	-	-	-	-	-
6 Wellington Road	-	0.6	-	-	-	-	-	0.7	-	-	-	-	-	-	-	-	-
7 West Tullos	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
8 Aberdeen Gateway	-	-	-	-	-	-	-	-	-	-	-	1.9	1.9	-	-	7.8	2.1
Sub Total	**-**	**0.6**	**-**	**1.8**	**2.0**	**1.3**	**2.6**	**0.7**	**-**	**3.0**	**7.8**	**4.2**	**1.9**	**0.8**	**-**	**9.6**	**3.0**
9 Links Road	0.6	0.3	-	-	0.9	-	-	-	-	-	-	-	-	-	-	-	-
10 Mastrick	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
11 Northfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
12 St Machar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kingswells (Prime Four)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	6.8	6.8
Sub Total	**0.6**	**0.3**	**-**	**-**	**0.9**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**6.8**	**6.8**
13 Bridge of Don	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
14 Denmore	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
15 Newton of Murcar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
16 Aberdeen Energy Park	-	-	-	-	-	0.4	-	-	0.2	-	1.4	1.8	-	0.7	-	-	-
17 Aberdeen Innovation Park	1.8	-	-	0.4	-	-	-	-	-	-	-	1.3	-	-	-	-	-
Sub Total	**1.8**	**-**	**-**	**0.4**	**-**	**0.4**	**-**	**-**	**0.2**	**-**	**1.4**	**3.1**	**-**	**0.7**	**-**	**-**	**-**

SITE LOCATION	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
18 Dyce Drive (Morley)	-	-	-	1.8	-	-	2.0	-	-	-	3.8	-	-	-	-	-	-
19 Airport South West (Dyce Drive)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.8	0.6	6.1
20 Farburn/Stoneywood	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
21 Kirkhill	1.1	0.8	-	-	-	0.8	-	-	-	-	0.9	-	-	-	-	-	-
22 Mugiemoss Road	1.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
23 Pitmedden Road	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
24 Pitmedden Road East	-	-	0.8	-	1.2	-	-	-	-	-	0.8	-	-	-	-	-	-
25 Raiths	1.0	0.9	-	1.6	-	-	-	-	-	-	-	-	-	0.6	-	-	-
26 Wellheads	-	-	-	-	-	-	-	-	-	-	-	-	0.9	-	-	-	-
27 Wellheads West	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sub Total	**3.3**	**1.7**	**0.8**	**3.4**	**1.2**	**0.8**	**2.0**	**-**	**-**	**-**	**5.5**	**-**	**0.9**	**0.6**	**0.8**	**0.6**	**6.1**
TOTALS	**5.7**	**2.6**	**0.8**	**5.6**	**4.1**	**2.5**	**4.6**	**0.7**	**0.2**	**3.0**	**14.7**	**7.3**	**2.7**	**2.1**	**0.8**	**17.0**	**15.9**

APPENDIX 5: Development Rates in Aberdeenshire (all figures in hectares)

Tables include only completed developments and exclude extensions to existing sites - see ‘Development Rates’ definition in *Appendix 1.*

SITE LOCATION	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Alford	0.1	0	0	0	0	0	0	0	0	0	0	0
Balmedie	0	0	0	0.5	0	0	0	0	1.2	0	0	0
Banchory	0	0	0	0	0	0	0.6	3.3	0.9	0	0	0.1
Blackburn	0.3	0	0	0	0	0	0	0	0	0.8	2.1	0.4
Boyndie	0	0	0	0	0	0	0.8	0	1.9	3.3	0	3.0
Ellon	0	0.3	0.4	0	5.6	0	0	1.8	1.4	1.9	2.2	0
Fraserburgh	0	1.43	0	0	0	0	0	0	0	0	3.0	0.9
Gourdon	0	0.14	0	0	0	0.4	0	0	0	0	0	0
Huntly	0	0	0	5.5	0	0	0	0	0	0.6	0	0
Insch	0.2	0	0	0	0.7	0	0	0	0.5	0.7	0	0.2
Inverurie	0	2.2	0	0.3	0	0	0	0	0	0	0	0
Kintore	3.2	0.4	0.2	0	1.1	0	2.7	0	7.8	2.1	3.0	1.5
Laurencekirk	0.6	0.3	0	0.1	0	0	0.4	0	0	0	0	0
Macduff	0	0	0.2	0	0	0	0	0	0.2	0	0	0
Mintlaw	0	0	0	0	0	0	0	0	0	0.3	0	0
Newburgh	0	0	0	0	0.8	0.5	0.2	0	0.2	0	0	0
Oldmeldrum	0	1.3	1.5	0.4	0	0	0	0	0.3	2.8	1.9	0
Peterhead	1.3	0.7	5.0	0	0.2	0.7	0.1	0	1.4	1.1	0	2.8
Port Elphinstone	0	0	1.4	0.9	1.3	0	0	0	0	0.9	0	0
Portlethen	0	5.6	0.8	10.6	4.4	1.3	0.7	2.4	0.3	0.3	0.4	4.3
Turriff	0	0	0.17	0	0	1.5	0	0	0	0	0	0
Westhill	0	1.0	0.9	4.1	0.6	14.7	3.1	0.3	2.5	2.7	1.5	3.0
Report Total	**5.7**	**13.4**	**10.6**	**22.3**	**14.7**	**19.1**	**8.6**	**7.7**	**18.7**	**17.4**	**14.1**	**16.1**

The Employment Land Audit is available from:

www.aberdeencity.gov.uk

www.aberdeenshire.gov.uk

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