



Employment



Land

Audit



2017/18



**Aberdeen City Council
Aberdeenshire Council**

Employment Land Audit 2017/18

A joint publication by Aberdeen City Council and Aberdeenshire Council

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Strategic Place Planning
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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 2017/18 Audit has a base date of 1st April 2018. 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 2017 and April 2018 the established land supply in Aberdeen City remained the same at 286h. Over the past year, no sites have been completed and 12ha remains under construction for a second year on The Event Complex Aberdeen (TECA). Aberdeenshire has seen a very minor increase of 2ha resulting in a new established supply total of 553ha. Over the past year, 15ha have been built out and a further 2.7ha are under construction.

Constrained Supply

There has been no change in the constrained supply for Aberdeen City between April 2017 and April 2018, remaining at 64ha for a third year, which equates to 22% of its established supply. In Aberdeenshire, the constrained supply has decreased by 3% over the same period to 245ha, meaning that 44% 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

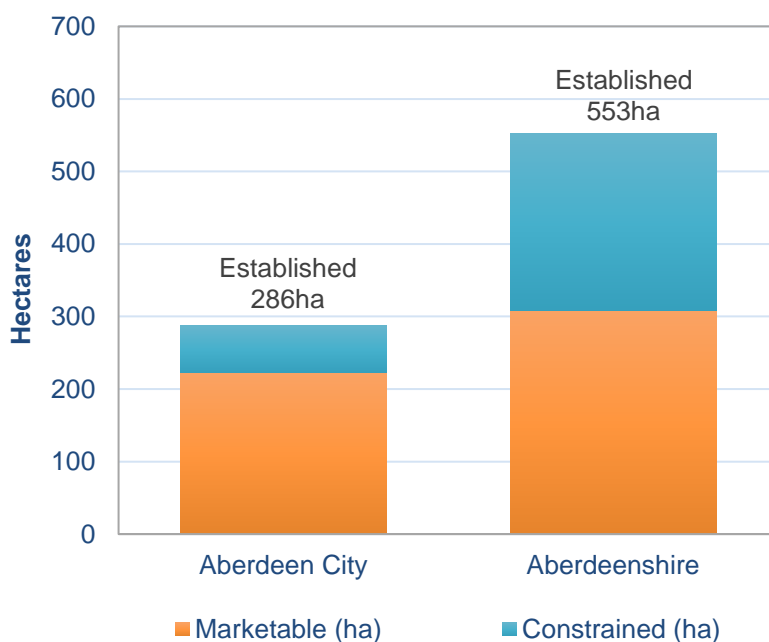
In Aberdeen City, the marketable land supply has seen no change between April 2017 and April 2018 and remains at 223ha, of which 52ha are classed as immediately available. In Aberdeenshire, there was a net increase of 3% in the marketable supply over the year to 307ha, of which 68ha are classed as immediately 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 recently been out for consultation, in which the employment land supply targets remain unchanged. The Proposed Plan will be submitted to the Planning and Environmental Appeals Division (DPEA) of the Scottish Government for an examination in public during the first half of 2019.

Figure 1: Employment Land Supply Aberdeen City and Shire 2017/18



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. In early 2018 the price of Brent rose above \$70 per barrel for the first time in over 3 years and encouraging signs of improvement in trading conditions in the oil and gas industry have been reported. It is anticipated that ongoing price stability in the region of \$70 - \$80 per barrel, together with the vast reduction in operating costs achieved over the last 2-3 years, may now allow companies to plan for the future. This could involve new property requirements, potentially filtering through to an increased take up rate of employment land.

¹ Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2018 ; Ryden 82nd Scottish Property Review April 2018; Ryden 83rd Scottish Property Review October 2018, CBRE Marketview Aberdeen Office H1 2018

Figure 2: Europe Brent Crude Price January 2011 – September 2018



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

Looking back over 2017/18, there remained a steady take up of employment land in Aberdeenshire, despite the continuation of low oil prices. In contrast, there has been a continued significant drop in the rate of development in the City over 2017/18 with no new developments having been completed or started in that period. TECA at Rowett North, (Bucksburn) covering 12h remains under construction for a second year. Several of the previously completed sites in the City are yet to be occupied despite some confidence returning to the oil and gas industry.

Over the period there has continued to be a fluctuation in the supply of both vacated secondary stock and excess Grade A space in new build premises, causing overall supply to continue to outstrip demand in both the office market. However, the level of available Grade A office space is down compared to the previous year as occupiers continue to upgrade to modern, high quality accommodation, moving out of poorer quality secondary premises. The industrial market also has an excess of supply over demand, particularly older stock, and activity has been low. Despite this, very limited speculative development is set to return to the new build industrial market with smaller multi-let units planned at Kingshill Commercial Park, Westhill and City South Business Park, Portlethen.

In the City, the Marischal Square development on Broad Street (high quality office, retail and leisure space) completed towards the end of 2017 has secured a number of occupiers and the remaining space continues to be marketed.

Developments within Aberdeenshire completed over the period 2017/18 include a new base for National Oilwell Varco at Kintore, expansion of the Brewdog complex at Ellon and a large council depot at Macduff.

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. A variety of major infrastructure projects are currently underway or close to completion with a view to strengthening the overall economy of the North East. The Aberdeen Western Peripheral Route (A90) is expected to be fully opened by the end of 2018, with the Balmedie to Tipperty section having already opened in mid-2018. This will significantly improve road links from the south to the north and west of Aberdeen City and beyond into Aberdeenshire. There are several significant projects currently underway to enhance the appeal of Aberdeen city centre including the Art Gallery Redevelopment and the Music Hall refurbishment. Broad Street improvements in Aberdeen City were completed in 2018 and have further enhanced the Marischal Square development. Elsewhere, TECA at Bucksburn is well underway and due to complete in 2019, and work has started 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 year, it will take 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. In particular from 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. This removes the risk of vacant rates for speculative new build development for developers and is expected to attract occupiers for new offices or industrial properties. The potential effect of these measures on the take up of land for new build premises in the North East of Scotland has yet to be reported.

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. 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.

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.

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.

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

- 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.
- 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 recently been out for consultation and will be submitted to the Planning and Environmental Appeals Division (DPEA) of the Scottish Government for an examination in public during the first half of 2019.
- 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.

2.3 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 Plan and intend to consult on their Main Issue Reports for the next plan in early 2019.
- 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. Some of the projects that have been completed include Broad Street improvements, as part of the Marischal Square development. Other projects currently underway are the redevelopment of the Art Gallery and the refurbishment of the Music Hall, both of which are due to be completed in 2019.

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/gdt21982iaguideprintfilev5.pdf>
3. The 2017 Scottish Annual Vacant and Derelict Land Survey (published June 2018):
<https://www.gov.scot/publications/scottish-vacant-derelict-land-survey-2017/>
4. The Aberdeen City Council Vacant and Derelict Land Survey 2017 Report
<https://www.aberdeencity.gov.uk/sites/default/files/2018-07/Scottish%20Vacant%20and%20Derelict%20Land%20Survey%202017.pdf>
5. Scottish Assessors Grampian Valuation Roll:
<https://www.saa.gov.uk/grampian/>
6. Aberdeen City Council Development Activity Report 2017
<https://www.aberdeencity.gov.uk/sites/default/files/2018-04/Aberdeen%20Development%20Activity%20Report.pdf>

3. Employment Land Audit 2017/18

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 2018, and the period monitored is 1 April 2017 to 31 March 2018. (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 2017 and April 2018

| Employment Area | 2017 | 2018 | Change |
|-----------------|------------|------------|---------------|
| Aberdeen City | 286 | 286 | 0% |
| Aberdeenshire | 551 | 553 | <1% |
| TOTAL | 837 | 839 | <1% |

- 3.3.2 In Aberdeen City the level of established land supply has remained unchanged between April 2017 and April 2018 at 286ha. Over the past year no further employment land sites have been completed and 12ha are under construction for a second year at TECA together with associated hotels. However, the Marischal Square brownfield development (office, retail and leisure space) in the city centre was completed towards the end of 2017. 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 virtually no change in the established land supply between 2017 and 2018 with an addition of 2ha to now total 553ha. Completions in the past year covered 15ha and a further 2.7ha were under construction as at April 2018. Over half of the take up has been on sites close to the City at Kintore, Ellon, Oldmeldrum, Kintore and Blackburn. However, a variety of new developments have also been completed further afield at Macduff, Aberchirder, Inch and Edzell.
- 3.3.4 Take up of employment land in Aberdeenshire has continued over the past year broadly in line with the 10 year average. However, it is noticeable that only sites totalling 2.7ha were found to be under construction as at 1 April 2018 indicating that the reported increased confidence returning to the oil and gas industry may take some time to have an effect on the take up of land for new build projects. In contrast with recent years there have been no completions on employment land sites in Aberdeen City over 2017/18 and the only site underway is the new AECC development, the construction of which has continued a second year.

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 2017 and April 2018

| Employment Area | 2017 | 2018 | Change |
|-----------------|------------|------------|------------|
| Aberdeen City | 64 | 64 | 0% |
| Aberdeenshire | 253 | 245 | -3% |
| TOTAL | 317 | 309 | -3% |

- 3.4.2 There has been no change in the constrained land supply for Aberdeen City between April 2017 and April 2018, remaining at 64ha for a third 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 decreased slightly by 3% to 245ha as sites have moved into the marketable supply and now makes up 44% of its established supply. A number of 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 come forward within five years of the base date of the audit, and so they are not classed as currently marketable. Other sites have significant infrastructure issues to overcome.

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 2017 and April 2018

| Employment Area | 2017 | 2018 | Change |
|-----------------|------------|------------|-----------|
| Aberdeen City | 223 | 223 | 0% |
| Aberdeenshire | 298 | 307 | 3% |
| TOTAL | 521 | 531 | 2% |

3.5.2 The marketable land supply in Aberdeen City has remained unchanged from April 2017 to April 2018 at 223ha, as there has been no take up of new sites. In Aberdeenshire there has been a net increase of 3% in the supply of marketable land, as a number of sites have come forward into the marketable 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 2017 and April 2018

| Employment Area | 2017 | 2018 | Change |
|-----------------|------------|------------|-----------|
| Aberdeen City | 52 | 52 | 0% |
| Aberdeenshire | 65 | 68 | 5% |
| TOTAL | 117 | 120 | 3% |

- 3.6.2 The supply of immediately available land in Aberdeen City has remained unchanged at 52ha in April 2018, with no further sites having been started or completed over the past year.
- 3.6.3 In Aberdeenshire there has been a small net increase of 5% in the supply of immediately available land to 68ha. 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 43% of all immediately available land is currently located within Aberdeen City and 57% within Aberdeenshire. 18% 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 (50ha) of the immediately available land in Aberdeenshire is situated within an 18 mile radius of Aberdeen.

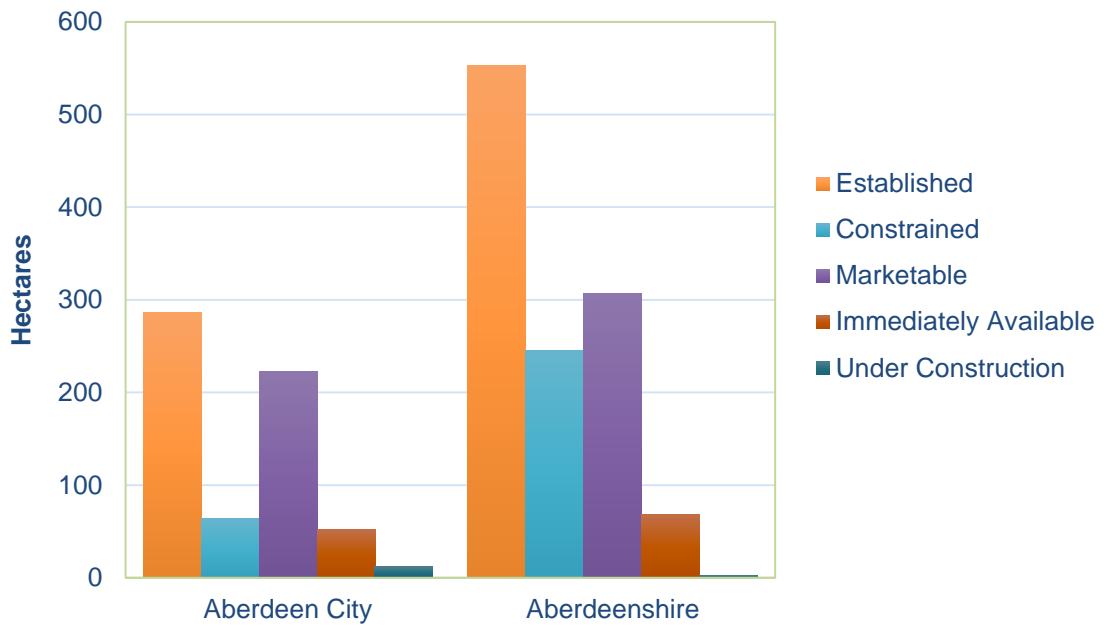
3.7 Under Construction

- 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 2018 there were 12ha of employment land under construction in Aberdeen City, entirely comprising of the TECA site which remains under construction for a second year. Within Aberdeenshire new build activity has also fallen significantly compared to recent years where only 2.7ha 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 2018



4. Analysis of Trends³

4.1 Employment Land Take-Up and Market Activity

- 4.1.1 In 2017/18 15ha of employment land was developed in Aberdeenshire, broadly in line with an average development rate of approximately 14ha per year for the previous 10 years. However, only 2.7ha is currently under construction (April 2018). In Aberdeen City, no developments have been completed over the past year, in contrast to an average development rate of around 8ha per annum for the previous 10 years, and significantly below the average over the 3 years from 2013/14 to 2015/16 which had been around 15ha per annum. Only the TECA site at Rowett North of 12h remains under construction for a second year which is expected to be completed in 2019.
- 4.1.2 In early 2018 the price of Brent rose above \$70 per barrel for the first time in over 3 years 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 \$70 - \$80 per barrel, together with the vast reduction in operating costs achieved over the last 2-3 years, may now allow companies to better plan for the future.
- 4.1.3 A fairly steady level of employment land take up has continued for commercial new build developments in Aberdeenshire, mostly on sites relatively close to the City. Further afield the take up has included both commercial and public sector developments, such as in Macduff where a new council depot has been constructed. Aberdeen City has seen no completed development on employment land sites over the past year, reflecting the continued over supply in the office and industrial markets and the available space in a large number of business premises constructed in recent years. There is likely to be a considerable time lag before any improvement in conditions for the oil and gas sector leads to renewed take up of employment land.
- 4.1.4 Within Aberdeenshire the majority of the new build development has taken place on LDP employment land sites at Kintore, Ellon and Oldmeldrum. At Westhill there has been no completed development over the year but a small number of sites are again under construction already or expected to commence in the near future. In the north of Aberdeenshire a number of relatively small sites have been developed, in addition to a large council depot built in Macduff.
- 4.1.5 In Aberdeen, no further development has taken place over the past year on the LDP employment land sites towards the edges of the city. The Marischal Square development of office, retail and leisure uses completed towards the end of 2017 on a city centre brownfield site (Figure 8) - this site had not been previously counted in the marketable supply. The development has various office and café/restaurant occupiers so far although there are still some vacant spaces waiting to be occupied.

Figure 8: Brownfield Employment Use Sites - Aberdeen City

| Address | Development | Site Size | Status |
|--------------------------------|--|--------------|-------------------------|
| Marischal Square, Broad Street | Mixed use including 16,264sq.m offices | 0.9 hectares | Completed - end of 2017 |

³ Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2018 ; Ryden 82nd Scottish Property Review April 2018; Ryden 83rd Scottish Property Review October 2018; CBRE Marketview Aberdeen Office H1 2018

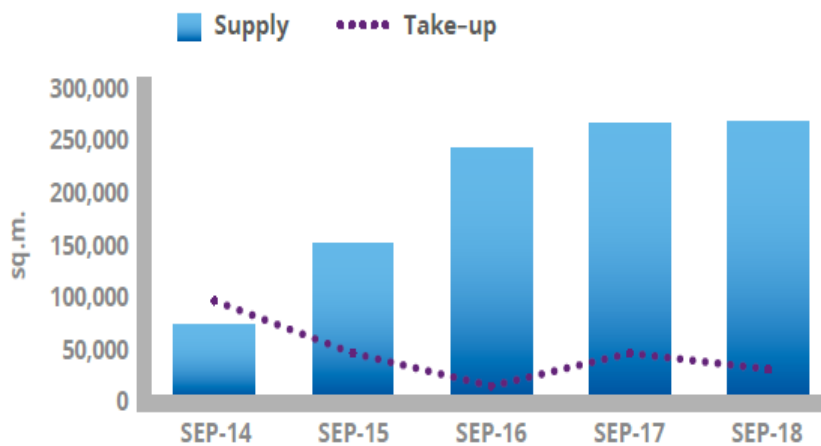
4.2 Office Space – Market Activity

- 4.2.1 Reports from local agents show that the office market in Aberdeen and the North East region continues to be affected by levels of confidence in the oil and gas sector, which has improved recently due to the stabilising of the oil price during 2018 to between \$70 and \$80 per barrel, the highest level in the past 3 years. However, this has yet to filter through to an increase in the take up of office accommodation. Many occupiers are thought to still have spare capacity in offices already owned or leased to meet any short term expansion. The supply of Grade A office space has fallen over the year as tenants have taken advantage of favourable lease terms to relocate to new city centre premises. As expected, this has led to an increase in the supply of secondary office stock, some of which is now regarded as obsolete and is being taken forward for conversion to residential uses in the city centre. Total office supply in Aberdeen has remained around 270,000 sqm, approximately one third of which is Grade A stock.

With continued high levels of good quality new and second hand office stock available in prime locations, there is likely to be a slowdown in the building of any new office developments over the next few years in and around Aberdeen.

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

Figure 9: Aberdeen Office Supply and Take Up



Source: Ryden, 83rdth Property Review, pg7, October 2018

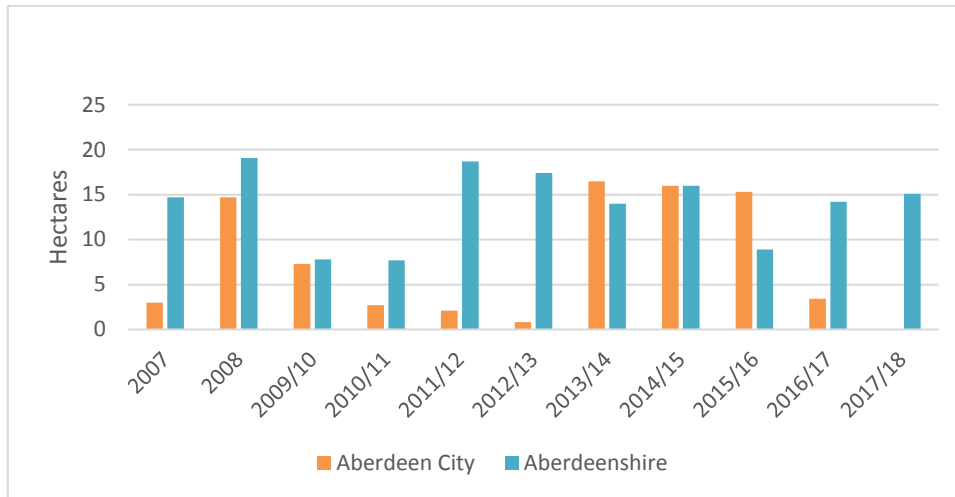
4.3 Industrial Space – Market Activity

- 4.3.1 Local agents reports indicate that the industrial market in and around Aberdeen continues to experience challenging times, despite the improved oil price which has yet to translate into increased activity. Supply has again increased over the past year to over 200,000 sqm and still far outstrips demand, as some oil and gas operators have placed substantial industrial facilities on the market in a bid to consolidate into smaller premises and reduce costs.

Limited new build construction has continued to be carried out over the past year on a pre-let basis for particular occupiers. However, an anticipated improved market for smaller units has now given developers confidence to go ahead with some speculative development of new build multi-let schemes, the first such schemes in the Aberdeen market for over 10 years, at Kingshill Commercial Park, Westhill, ABZ Business Park, Dyce and City South, Portlethen.

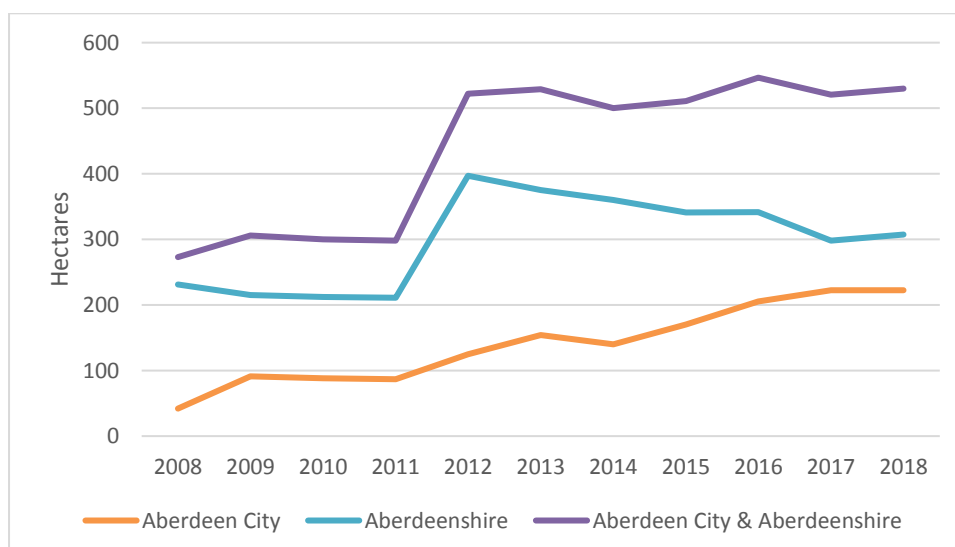
4.4 Trends in Employment Land

Figure 10: Employment Land Development Rates 2006-2017/18



- 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 significantly in the City during 2016/17 and there were no further sites completed in 2017/18. This can be attributed to the recent class 4 office completions in the city centre (The Capitol, Silver Fin, Marischal Square) which have added to the overall provision of office uses within the City. However, it is hoped that take up of employment land will pick up over the next few years as mixed sites with employment uses come forward. Overall, take up in Aberdeenshire has remained relatively steady over the past 10 years, averaging 14ha per annum. NB: The monitored period for the Employment Land Audit changed from a calendar year to April-March in 2009.

Figure 11: Trends in Marketable Employment Land in Aberdeen City and Shire 2008-2018



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 three 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.

Figure 12: Europe Brent Crude Price January 2011 – September 2018



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

4.4.3 Figure 12 above shows the dramatic fall in the price of Brent Crude during late 2014 from over \$100 per barrel to a level in the region of \$50 over 2016/17. Over the course of 2018 the oil price has risen to over \$70 per barrel and as high as \$80 per barrel by the autumn. In response, the rate of take up of employment land in Aberdeen City has reduced considerably now that sites which had commenced before the downturn in oil prices have been largely built out. There will be a time delay before any sustained increase in the oil price and return of confidence to the industry filters through to an uptake in the rate of development on employment land sites. The take up of employment land in Aberdeenshire is tied to the oil and gas sector to a lesser extent to that of the City and completions have continued to be relatively steady and in line with the 10 year average.

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).

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.

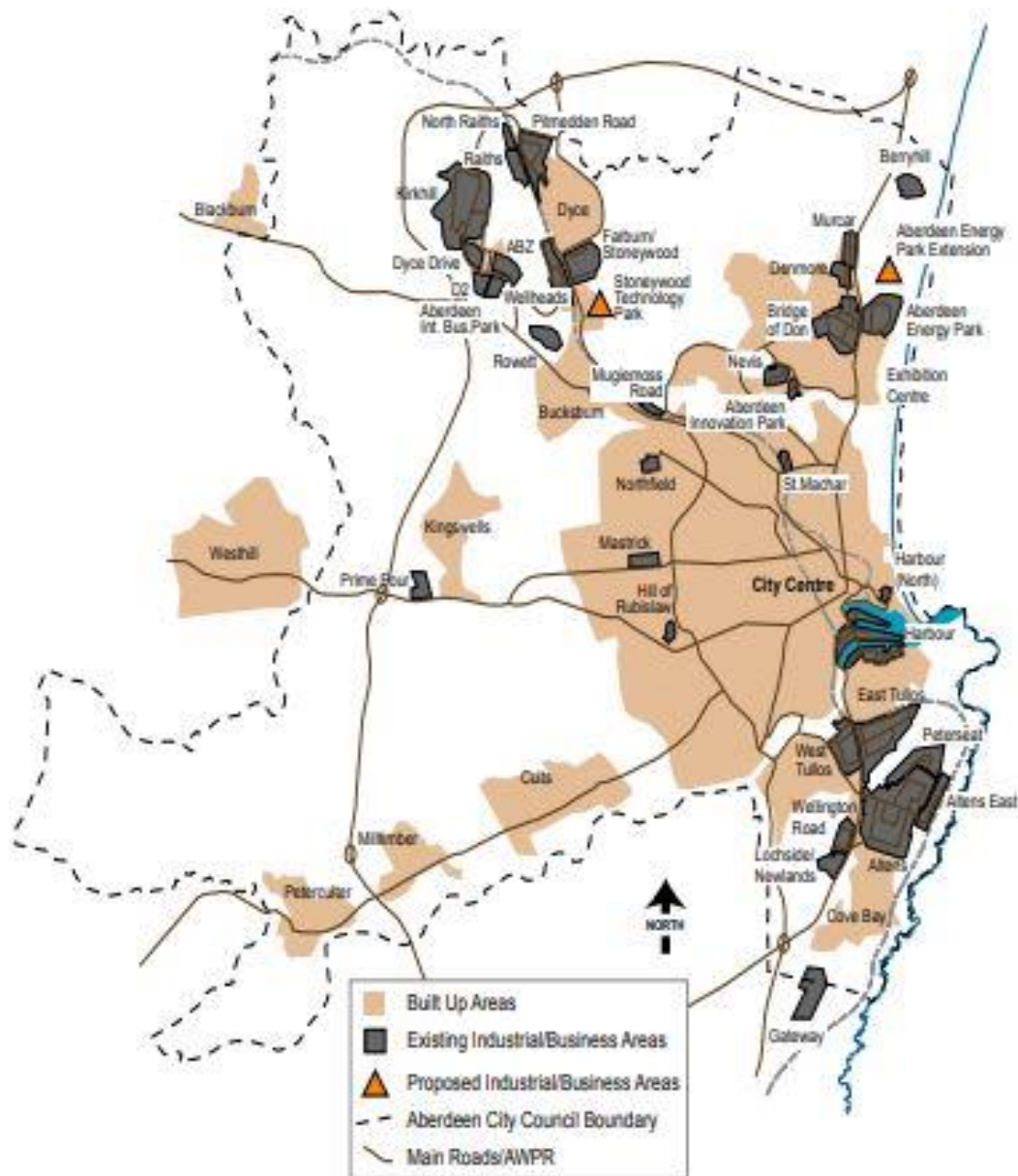
Under Construction

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 Properties | None | Part | 8.2 | 0 | 8.2 | 8.2 | 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 | 3 | 0 | 0 |
| Findlay Farm | Aberdeen Science Parks LP | Class 4 Only | No | 16.4 | 0 | 16.4 | 0 | 0 |
| The Core Berrvhill/Cloverhill | Private | | No | 68.4 | 0 | 68.4 | 0 | 0 |
| Airport Dyce Drive | Miller, Abstract, ABZ Development Ltd | Ownership & Infrastructure | Part | 77.35 | 30.1 | 47.25 | 21.5 | 0 |
| Dyce Drive | Morley | | Yes | 1.1 | 0 | 1.1 | 1.1 | 0 |
| 9 Dyce Avenue 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 |
| OP9 Grandhome | Grandhome Trust | | No | 5 | 5 | 0 | 0 | 0 |
| OP18 Craibstone North & Walton Farm | Private | | No | 1.5 | 1.5 | 0 | 0 | 0 |
| OP19 Rowett North | Private | | No | 34.5 | 0 | 34.5 | 0 | 12 |
| Prime Four | Drum | | Part | 16.5 | 0 | 16.5 | 5.9 | 0 |
| OP33 Greenferns | ACC | | No | 10 | 10 | 0 | 0 | 0 |
| OP34 East Arnhall | Private | | No | 1 | 1 | 0 | 0 | 0 |
| OP38 Countesswells | Countesswells Consortium | | No | 10 | 0 | 10 | 0 | 0 |
| O48 Oldfold | CALA | | No | 5 | 5 | 0 | 0 | 0 |
| OP59 Loirston | Private | | No | 11 | 11 | 0 | 0 | 0 |
| | | | | 286.05 | 63.6 | 222.45 | 52.3 | 12 |

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 | | Part | 1 | 0 | 1 | 0 | 0 |
| B/FR/E/002 | West Shore | Fraserburgh | BUS1 | Aberdeenshire Council | | 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 | | 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 | | Yes | 1.4 | 0 | 1.4 | 1.4 | 0 |
| B/IB/E/003 | Inverboyndie- Phase 2 | Inverboyndie | BUS | Private Landowner | | No | 1.4 | 0 | 1.4 | 0 | 0 |
| B/MC/E/001 | Buchan Road - East | Macduff | BUS | Aberdeenshire Council | | Yes | 0.6 | 0 | 0.6 | 0.6 | 0.12 |
| B/MC/E/003 | Law of Doune and Tarlair Industrial Estate | Macduff | BUS | Private Landowner | | 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 | | 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 | 0.12 |
| 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 | | No | 2 | 0 | 2 | 0 | 0 |
| U/HT/E/001 | East of A90 | Hatton | OP4 | A Wyness & Sons | | No | 0.8 | 0 | 0.8 | 0 | 0 |
| U/LG/E/001 | Inverquhomery Road | Longside | BUS | Private Landowner | | 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 | | Part | 0.62 | 0 | 0.62 | 0.62 | 0 |
| U/ML/E/005 | Land at Nether Aden | Mintlaw | OP1 | Bancon Homes | | No | 4 | 0 | 4 | 0 | 0 |
| U/ML/E/006 | Northwoods Business Park | Mintlaw | | Colaren Homes | | No | 4.25 | 0 | 4.25 | 0 | 0 |
| U/PH/E/002 | Balmoor Industrial Estate | Peterhead | BUS2 | Aberdeenshire Council | | Yes | 0.87 | 0 | 0.87 | 0.87 | 0 |
| 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 | | Part | 1.71 | 0 | 1.71 | 1.71 | 0 |

| | | | | | | | | | | | |
|----------------------|---|--------------|------|-----------------------|---------------------------|------|-------------|--------------|--------------|-------------|----------|
| U/PH/E/005a | Damhead/Upperton Industrial Estate | Peterhead | BUS3 | Private Landowner | | Part | 2.2 | 0 | 2.2 | 0 | 0 |
| U/PH/E/006 | Energetica Industry Park (Upperton Ind | Peterhead | BUS3 | Scottish Enterprise | | No | 16.6 | 0 | 16.6 | 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 | | Part | 0.37 | 0 | 0.37 | 0.37 | 0 |
| U/PH/E/009 | Invergie 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 | | Part | 4.5 | 0 | 4.5 | 0 | 0 |
| Buchan Total: | | | | | | | 80.5 | 18.15 | 62.35 | 5.02 | 0 |
| Formartine | | | | | | | | | | | |
| F/BA/E/001 | Land at Balmedie South | Balmeddie | OP1 | Aberdeenshire Council | Other | No | 5 | 2.5 | 2.5 | 2.5 | 0 |
| F/BD/E/001 | Land at Blackdog | Blackdog | OP1 | Private Landowner | Infrastructure, Other | No | 4 | 4 | 0 | 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 | | | Yes | 2.97 | 0 | 2.97 | 2.97 | 0.9 |
| F/EL/E/006 | Balmacassie | Ellon | OP4 | c/o Knight Frank | | No | 9 | 0 | 9 | 0 | 0 |
| F/EL/E/007 | Cromleybank | Ellon | OP1 | Scotia Homes | Other | No | 2 | 2 | 0 | 0 | 0 |
| F/FV/E/001 | South of Westfield Farm | Foveran | OP1 | Harper & Cochrane Ltd | | No | 2 | 0 | 2 | 0 | 0 |
| F/FV/E/002 | South of Turin Way | Foveran | OP3 | Private Landowner | | No | 1.5 | 0 | 1.5 | 0 | 0 |
| F/NB/E/002 | Newburgh Industrial Units | Newburgh | BUS | Private Landowner | | No | 1.96 | 0 | 1.96 | 0 | 0 |
| F/NB/E/007 | West of Airyhall | Newburgh | OP1 | Private Landowner | | No | 0.8 | 0 | 0.8 | 0 | 0 |
| F/OM/E/003b | Oldmeldrum Business Park/ Meadows Industrial Estate | Oldmeldrum | BUS | Private Landowner | | 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 | | | 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 | | No | 2 | 0 | 2 | 0 | 0 |
| F/TF/E/001 | Markethill North | Turriff | BUS1 | Aberdeenshire Council | | Yes | 0.2 | 0 | 0.2 | 0.2 | 0 |
| F/TF/E/003 | Morrison Motors | Turriff | BUS2 | Private Landowner | | | 1.16 | 0 | 1.16 | 0 | 0 |
| F/TF/E/004 | Markethill Industrial Estate | Turriff | BUS1 | Aberdeenshire Council | | 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 | | No | 1 | 0 | 1 | 0 | 0 |
| F/TF/E/008 | East of Markethill Industrial Estate | Turriff | OP4 | Private Landowner | | No | 1.7 | 0 | 1.7 | 0 | 0 |
| F/TF/E/009 | Adjacent to Broomhill Road/Markethill Industrial Estate | Turriff | OP5 | Private Landowner | | No | 4.5 | 0 | 4.5 | 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 | | No | 3.1 | 0 | 3.1 | 0 | 0 |
| Formartine Total: | | | | | | | 71.37 | 29.71 | 41.66 | 8.15 | 0.9 |
| Garioch | | | | | | | | | | | |
| G/BB/E/004 | Blackburn Business Park | Blackburn | BUS | Private Landowner | | Part | 0.72 | 0 | 0.72 | 0.72 | 0 |
| G/IS/E/005 | Insch Business Park, Muiryheadless | Insch | BUS | Aberdeenshire Council | | Yes | 2.13 | 0 | 2.13 | 2.13 | 0 |
| G/IS/E/006 | Insch Business Park | Insch | BUS | Private Landowner | Ownership | No | 2.2 | 2.2 | 0 | 0 | 0 |
| G/IS/E/007 | North of Insch Business Park | Insch | OP4 | Private Landowner | | No | 5 | 0 | 5 | 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 | | 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 | | No | 1.5 | 0 | 1.5 | 0 | 0 |
| G/IV/E/015 | Thainstone | Inverurie | OP13 | ANM Group Ltd | | No | 18 | 0 | 18 | 0 | 0 |
| G/IV/E/016 | Port Elphinstone Central | Inverurie | BUS6 | Kilbride Resources Ltd | | No | 2.5 | 0 | 2.5 | 0 | 0 |
| G/IV/E/017 | Crichiebank Business Centre | Inverurie | BUS5 | Private Landowner | | Part | 0.5 | 0 | 0.5 | 0 | 0 |
| G/IV/E/018 | Kirkwood Commercial Park, Thainstone | Inverurie | OP16 | Kirkwood Investments Ltd | | 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 | | Part | 2.8 | 0 | 2.8 | 0 | 0 |
| G/KT/E/002b | Kintore North/Bridgend | Kintore | BUS2 | Private Landowner | | No | 2.5 | 0 | 2.5 | 0 | 0 |
| G/KT/E/003b | Kintore Business Park | Kintore | BUS1 | Private Landowner | | Yes | 0.6 | 0 | 0.6 | 0 | 0 |
| G/KT/E/004 | Kintore East | Kintore | OP1 | Kintore Consortium | | 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 | | No | 5 | 0 | 5 | 0 | 0 |
| G/WH/E/007 | Arnhall/Silvertrees Business Parks | Westhill | BUS | Chap Construction | | Yes | 0.95 | 0 | 0.95 | 0.95 | 0 |
| G/WH/E/008 | Arnhall Gateway | Westhill | OP2 | Westhill Dev Co Ltd | | Yes | 4.65 | 0 | 4.65 | 4.65 | 1 |
| G/WH/E/009 | Former Blockworks Site, Straik Road | Westhill | | Private Landowner | | Yes | 0.86 | 0 | 0.86 | 0.86 | 0 |
| Garioch Total: | | | | | | | 92.38 | 35.8 | 56.58 | 11.61 | 1 |

| 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 | | 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 | | No | 0.46 | 0 | 0.46 | 0 | 0 |
| K/GD/E/001 | Linton Business Park | Gourdon | BUS | Aberdeenshire Council | | Yes | 1.29 | 0 | 1.29 | 1.29 | 0 |
| K/GD/E/002 | East of Linton Business Park | Gourdon | OP1 | Private Landowner | | No | 3 | 0 | 3 | 0 | 0 |
| K/LK/E/004 | Mart Site West, Market St | Laurencekirk | | Aberdeenshire Council | | 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 | Private Landowner | | 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 | | | No | 6.65 | 0 | 6.65 | 0 | 0 |
| K/NH/E/002 | Land to West of A90 | Newtonhill | OP2 | Elsick Dev Co Ltd | | No | 12.1 | 0 | 12.1 | 0 | 0 |
| K/PL/E/004 | Badentoy Industrial Estate | Portlethen | BUS1 | Badentoy Developments Ltd | | Yes | 5.6 | 0 | 5.6 | 5.6 | 0 |
| K/PL/E/005 | City South Business Park | Portlethen | BUS2 | Dandara | | Part | 10.6 | 0 | 10.6 | 10.6 | 0 |
| K/PL/E/008 | Land to NW of Badentoy | Portlethen | OP1 | Dandara | | No | 6.5 | 0 | 6.5 | 0 | 0 |
| K/PL/E/009 | Fairview | Portlethen | OP2 | Private Landowner | | No | 4 | 0 | 4 | 0 | 0 |
| K/SC/E/001 | Roadside | St Cyrus | OP1 | Private Landowner | Marketability | No | 2 | 2 | 0 | 0 | 0 |
| K/ST/E/003 | East Newtonleys | Stonehaven | BUS2 | Bancon Developments | | No | 11.5 | 0 | 11.5 | 0 | 0 |
| K/ST/E/004 | East Newtonleys | Stonehaven | OP5 | Bancon Developments | | No | 7 | 0 | 7 | 0 | 0 |
| K/ST/E/005 | Redcloak | Stonehaven | BUS3 | Private Landowner | | No | 1 | 0 | 1 | 0 | 0 |
| Kincardine & Mearns Total: | | | | | | | 222.21 | 119 | 103.21 | 31.5 | 0 |
| 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 | | 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 | | Yes | 5.9 | 0 | 5.9 | 4.3 | 0 |
| M/BN/E/003 | Burn O'Bennie | Banchory | BUS2 | Bancon Developments | | 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 | | Yes | 2 | 0 | 2 | 2 | 0.7 |
| M/HT/E/004a | Deveron Road | Huntly | BUS1 | Private Landowner | | No | 1.75 | 0 | 1.75 | 0 | 0 |
| M/HT/E/005 | Mart | Huntly | BUS3 | Private Landowner | | No | 3.28 | 0 | 3.28 | 0 | 0 |
| M/HT/E/006 | Adj Linnorie | Huntly | OP6 | Private Landowner | | No | 4.5 | 0 | 4.5 | 0 | 0 |
| M/KM/E/001 | Opposite School | Kennethmont | OP3 | Private Landowner | | 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 | | No | 0.27 | 0 | 0.27 | 0 | 0 |
| M/MF/E/001 | Muir Of Fowlis | Muir of Fowlis | BUS | Private Landowner | | No | 0.3 | 0 | 0.3 | 0 | 0 |
| M/RN/E/001 | Rhynie Richmond Avenue East | Rhynie | BUS | Aberdeenshire Council | | 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 | Glendeskry | Tarland | OP1 | Private Landowner | Other | No | 1 | 1 | 0 | 0 | 0 |
| M/TP/E/001 | Station Garage | Torphins | OP1 | Private Landowner | | No | 1.79 | 0 | 1.79 | 0 | 0 |
| Marr Total: | | | | | | | 29.88 | 6.1 | 23.78 | 6.48 | 0.7 |
| Report Total: | | | | | | | 552.73 | 245.4 | 307.33 | 68.11 | 2.72 |

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 | 8.5 | 23.07 | 5.47 | 0.9 |
| Peterhead-Hatton | 65.93 | 15.65 | 50.28 | 4.4 | 0 |
| Total | 97.5 | 24.15 | 73.35 | 9.87 | 0.9 |
| Huntly-Pitcapple | 20.86 | 2.2 | 18.66 | 4.13 | 0.7 |
| Inverurie-Blackburn | 63.19 | 28 | 35.19 | 3.02 | 0 |
| Total | 84.05 | 30.2 | 53.85 | 7.15 | 0.7 |
| Portlethen-Stonehaven | 133.15 | 37 | 96.15 | 28.4 | 0 |
| Sth of Drumlithie-Laurencekirk | 11.57 | 11 | 0.57 | 0.11 | 0 |
| Total | 144.72 | 48 | 96.72 | 28.51 | 0 |
| Aberdeen HMA Local Growth | 39.15 | 16.88 | 22.27 | 8.94 | 1 |
| Rural HMA Local Growth | 187.31 | 126.17 | 61.14 | 13.64 | 0.12 |
| Total | 226.46 | 143.05 | 83.41 | 22.58 | 1.12 |
| Report Total | 552.73 | 245.4 | 307.33 | 68.11 | 2.72 |

| Regeneration Priority Area | Established | Constrained | Marketable Total | Immediately Available | Under Construction |
|------------------------------------|---------------|--------------|------------------|-----------------------|--------------------|
| Regeneration Priority Area | 119.92 | 52.29 | 67.63 | 9.15 | 0 |
| Outwith Regeneration Priority Area | 432.81 | 193.11 | 239.7 | 58.96 | 2.72 |
| Report Total | 552.73 | 245.4 | 307.33 | 68.11 | 2.72 |

Appendix 5: Development Rates in Aberdeen City 2005 - 2017/18

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 |
|-------------------------------------|------------|------------|------------|-------------|------------|------------|------------|------------|-------------|-------------|-------------|------------|----------|
| 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. Mugiemooss Road | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 24. Pitmedden Road | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 25. Pitmedden Road East | - | - | - | 0.8 | - | - | - | - | - | - | - | - | - |
| 26. Raiths | - | - | - | - | - | - | 0.6 | - | - | - | - | - | - |
| 27. Wellheads | - | - | - | - | - | 0.9 | - | - | - | - | - | - | - |
| 28. Wellheads West | - | - | - | - | - | - | - | - | - | - | - | - | - |
| 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 |

Appendix 5: Development Rates in Aberdeenshire 2005 - 2017/18 (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 |
|----------------------|--------------|--------------|--------------|--------------|-------------|-------------|--------------|--------------|--------------|-------------|-------------|--------------|--------------|
| Aberchirder | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.22 |
| Balmedie | 0 | 0.54 | 0 | 0 | 0 | 0 | 1.22 | 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 |
| Blackburn | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.76 | 2.13 | 0.35 | 0 | 0 | 0.3 |
| Boyndie | 0 | 0 | 0 | 0 | 0.78 | 0 | 1.94 | 3.29 | 0 | 3 | 0 | 0 | 0 |
| Cuminestown | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.06 |
| Edzell Woods | | | | | | | | | | | | | 1.7 |
| Ellon | 0.43 | 0 | 5.63 | 0 | 0 | 1.79 | 1.38 | 1.86 | 2.18 | 0 | 1.1 | 1.07 | 2.29 |
| Fraserburgh | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2.96 | 0.85 | 1.32 | 0 | 0 |
| Gourdon | 0 | 0 | 0 | 0.44 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.24 | 0 |
| Huntly | 0 | 5.5 | 0 | 0 | 0 | 0 | 0 | 0.61 | 0 | 0 | 0 | 0.68 | 0 |
| Insch | 0 | 0 | 0.66 | 0 | 0 | 0 | 0.47 | 0.67 | 0 | 0.23 | 0 | 0 | 0.24 |
| Inverurie | 1.43 | 1.15 | 1.33 | 0 | 0 | 0 | 0 | 0.9 | 0 | 0 | 0 | 1.95 | 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 |
| Laurencekirk | 0 | 0.08 | 0 | 0 | 0.4 | 0 | 0 | 0 | 0 | 0 | 0.15 | 0 | 0 |
| Macduff | 0.2 | 0 | 0 | 0 | 0 | 0 | 0.21 | 0 | 0 | 0 | 0.43 | 0 | 3.43 |
| Marywell | 0 | 0 | 3.2 | 1.27 | 0 | 2.36 | 0.28 | 0.28 | 0 | 0 | 0.62 | 4.23 | 0 |
| Mintlaw | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.31 | 0 | 0 | 0 | 0 | 0.29 |
| Newburgh | 0 | 0 | 0.78 | 0.46 | 0.15 | 0 | 0.24 | 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 |
| Peterhead | 4.99 | 0 | 0.2 | 0.65 | 0.1 | 0 | 1.44 | 1.09 | 0 | 2.81 | 0 | 0.28 | 0.91 |
| Portlethen | 0.8 | 10.6 | 1.2 | 0 | 0.7 | 0 | 0 | 0 | 0.39 | 4.32 | 3 | 3.1 | 0 |
| Turriff | 0.17 | 0 | 0 | 1.53 | 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 |
| 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 |

Appendix 5: Details of Aberdeen City and Aberdeenshire Completions 2017/18

| Site Ref | Site Name | Settlement | Plot Size (h) | Planning Permission | Description | Building size (sq m) |
|-------------|---|---------------|---------------|---------------------|---|----------------------|
| U/ML/E/003 | Newlands Road | Mintlaw | 0.29 | 2016/2734 | Head office for Claymore Homes | 443 |
| U/PH/E/002 | Balmoor Industrial Estate | Peterhead | 0.3 | 2015/0494 | Switch gear building and yard | 318 |
| U/PH/E/003 | Dales Industrial Estate West | Peterhead | 0.61 | 2016/3171 | Box wash facility | 1584 |
| G/IS/E/005 | Insch Business Park | Insch | 0.24 | 2013/3657 | Industrial storage unit | 400 |
| G/KT/E/004 | Kintore East | Kintore | 4.9 | 2015/3048 | Offices, workshop, store, yard | 3357 |
| K/EW/E/001 | Newesk | Edzell Woods | 1.7 | 2015/2241 | Warehouse | 9600 |
| B/MC/E/003 | Law of Doune and Tarlair Industrial Estate | Macduff | 3.43 | 2017/0012 | Council Depot Facility | 4470 |
| B/AB/E/001 | Cornhill Road | Aberchirder | 0.22 | 2015/2756 | Building for storage & Distribution | 294 |
| F/CT/E/001 | Cuminestown Industrial Estate | Cuminestown | 0.061 | 2017/1014 | General Storage Building | 216 |
| F/OM/E/003b | Oldmeldrum Business Park/ Meadows Industrial Estate | Oldmeldrum | 0.72 | 2016/1426 | Retail Development (Including Supermarket) | 1746 |
| F/EL/E/005 | Ellon Commercial Park Brewdog Plc Site 7 | Ellon | 1.35 | 2016/2650 | New sour beer facility with associated production offices etc | 1630 |
| F/EL/E/005 | Ellon Commercial Park | Ellon | 0.82 | 2017/1777 | Recycling/Waste Centre including Erection of Shed and Associated Welfare Facilities | 823 |
| F/EL/E/005 | Ellon Commercial Park | Ellon | 0.12 | 2017/2515 | Office Building and Assoc. Car Parking | 129 |
| | Marischal Square | Aberdeen City | 0.9 | P140698 | Class 4 Office Space | 16,264 |



Aberdeenshire
COUNCIL



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Planning Authority*