EMPLOYMENT LAND AUDIT 2015/16

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ABERDEEN CITY AND SHIRE | Strategic Development Planning Authority

EMPLOYMENT LAND AUDIT 2015/16

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 2015/16 Audit has a base date of 1st April 2016. 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 2015 and April 2016 the established land supply decreased in the City by 4% bringing the total to 269ha. Over the past year, 15ha have been completed and a further 27ha are under construction, primarily at Dyce Drive adjacent to Aberdeen Airport and at Prime Four, Kingswells. Aberdeenshire has also seen a 4% decrease in the established supply to 558ha. Over the past year, 9ha have been built out and a further 13ha 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 decreased by 42% from April 2015 to April 2016, attributable to allocated sites now moving forward. There are 64ha of constrained supply in Aberdeen which is 24% of its established supply. In Aberdeenshire, the constrained supply has decreased by 10% over the same period to 217ha, meaning that 39% 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

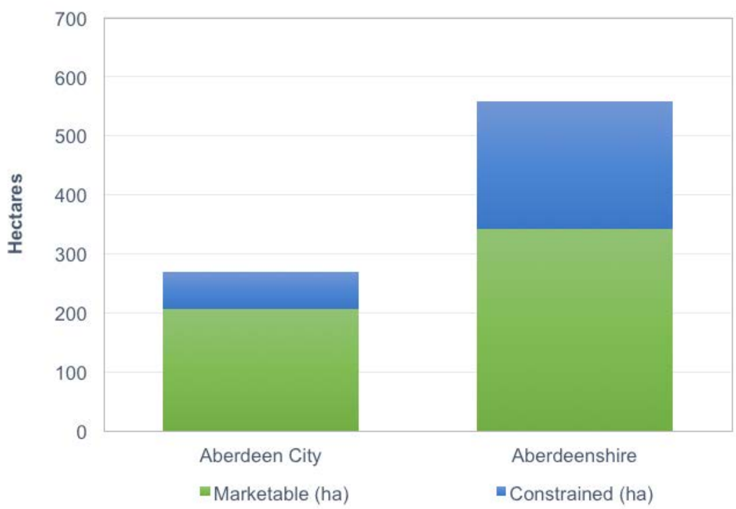
In Aberdeen City, the marketable land supply has seen a net increase of 21% between April 2015 and April 2016 to 205ha, of which 46ha are classed as immediately available. This is largely the result of planning approvals for the LDP allocated sites at both Rowett North and Countesswells. In Aberdeenshire, there was no net change in the marketable supply over the year, remaining at 341ha, of which 70ha are classed as immediately available. Various sites have been taken up over the year, largely in the vicinity of Aberdeen, while others have entered the marketable supply.

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.

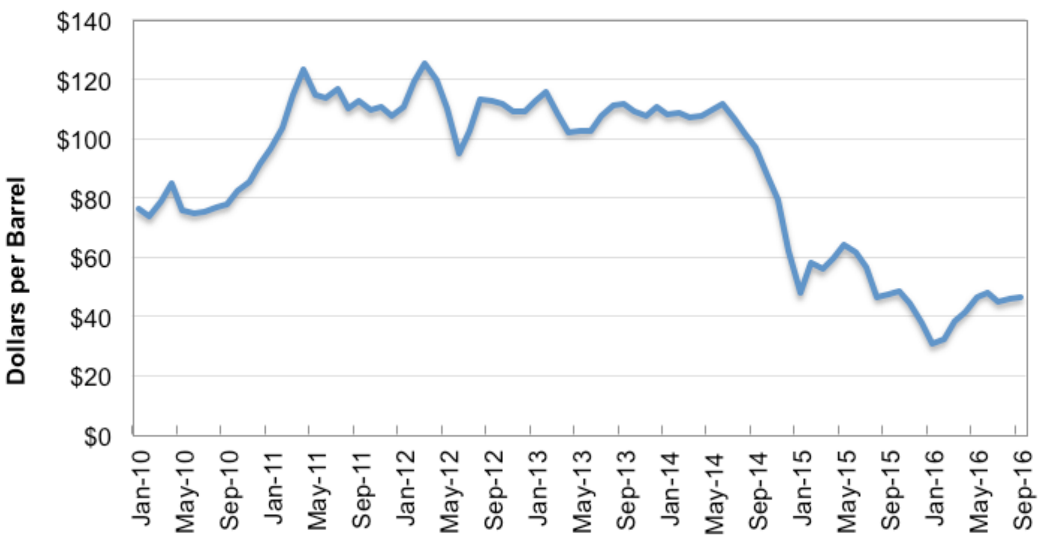
Figure 1: Employment Land Supply Aberdeen City and Shire, 2015/16



Market Activity [1]

Figure 2 below shows the dramatic fall in the price oil towards the end of 2014 from over $100 per barrel to below $50 per barrel and prices have remained low. In response to this prolonged low level of global oil prices, the energy industry has continued to consolidate operations and reduce overheads, resulting in further job losses and an overall reduction in accommodation needs. The situation is expected to adversely affect demand into 2017 and most likely beyond for both new build developments and secondary stock.

Figure 2: Europe Brent Crude Price January 2010 – September 2016



Source:eia.gov (US Energy Information Administration)

Looking back over 2015/16, there remained a steady take up of employment land in the City, but there has been a drop in the rate of development in Aberdeenshire. 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 in both the industrial and office markets. While there has been some speculative building over the past year, it is considerably reduced because of the challenging market conditions.

[1] *Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2016 ; Ryden 78th Scottish Property Review April 2016; Ryden 79th Scottish Property Review October 2016*

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 Prime Four, Kingswells. In addition there are several large, high quality office developments recently completed or underway on brownfield sites in the city centre, such as The Capitol and Silver Fin office developments on Union Street, as well as the Marischal Square development of high quality office, retail and leisure space which is now well under construction.

In the Shire, the new build activity has been mainly concentrated in close proximity to Aberdeen. At Westhill the development of Kingshill Commercial Park and Silvertrees Business Park continues but at a slower pace than previous years. Development has also taken place or is under construction at Badentoy North and City South Business Parks, Portlethen, and at Midmill, Kintore.

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 require significant further investments and improvements to our transport infrastructure, housing, business space and social, cultural and leisure services. The Aberdeen Western Peripheral Route and duelling of the Balmedie to Tipperty section of the A90 is expected to be completed by the end of 2017.This will significantly improve road links from the south to the north and west of Aberdeen City and beyond into Aberdeenshire. There are also several regeneration projects across Aberdeen City which are planned or currently underway, such as the Marischal Square Development, Broad Street improvements, the Art Gallery Redevelopment, and the Aberdeen Exhibition and Conference Centre which is due to open in late 2018.

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. A prolonged downturn in the oil price is expected to have an adverse effect on the rate of take up of employment land in the future. The majority of recent completions or developments under construction were likely to have been committed to prior to the downturn.

Land ownership can 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. In addition, where employment land sites are subject to ground leases with already high rents which are confined to review on an upwards only basis, the viability of these sites in a challenging market is adversely affected.

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 **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 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 will 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). ONE will focus on diversifying oil and gas, tourism, food and drink, and life sciences

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

to create a sustainable economic future for the area. A provisional **Regional Economic Strategy** was published in December 2015 to support the City Region Deal and establishment of ONE. It aims to 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.

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 **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** identified an Action Plan to work on a range of economic, environmental and social projects in Fraserburgh. A **New Regeneration Strategy for Aberdeenshire** was approved in March 2016 and sets out revised proposals for the regeneration of the north coast 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 and the airport in Aberdeen City, through Ellon, to Peterhead in Aberdeenshire.

2.1.7 The Scottish Government's planning policy for economic development is set out in the new **Scottish Planning Policy (SPP)** published in June 2014, alongside NPF3. 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.

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 Both Aberdeen City and Aberdeenshire are very close to completion of their replacement Local Development Plans which are expected to be adopted in early 2017.

2.3.5 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.

2.3.6 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.

2.4 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 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 2016-2017 Aberdeen Industrial Areas Guide
2. The Aberdeenshire Business and Industrial Areas Guide 2014
3. The 2015 Scottish Annual Vacant and Derelict Land Survey (published May 2016)
4. The Aberdeen Vacant and Derelict Land Survey 2015 Report (see 'Other Related Information')
5. CoStar - Commercial Property Database:
6. Scottish Assessors Grampian Valuation Roll
7. Aberdeen City Council Office and Hotel Planning Bulletins

   (See 'Other Related Information')

3. EMPLOYMENT LAND AUDIT 2015/16

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 was held on 21 November 2016 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 2016, and the period monitored is 1 April 2015 to 31 March 2016. (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.

Figure 2 - Aberdeen City and Aberdeenshire

Based on Ordnance Survey mapping. © Crown copyright reserved. Aberdeenshire Council 0100020767 2017

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 2015 and April 2016 (figures in hectares)

Employment Area	2015	2016	Change
Aberdeen City	280	269	-4%
Aberdeenshire	581	558	-4%
TOTAL	**861**	**827**	**-4%**

3.3.2 In Aberdeen City the level of established land supply has seen a net decrease of 4% between April 2015 and April 2016 to 269ha. Over the past year 15ha have been completed and 27ha are under construction. There has continued to be significant activity in and around the City, some of which remains under construction for a second year at Aberdeen Airport and Prime Four. There have been no new identifications of employment land, and no additions have been made to the existing areas. .

3.3.3 In Aberdeenshire there has also been a net decrease of 4% in the established land supply between 2015 and 2016 to 558ha. Completions in the past year covered 9 hectares and a further 13 hectares were under construction as at April 2016. There has been take up of sites close to the City at Westhill, Portlethen and Kintore, and a number of brownfield sites have entered the supply for the first time this year. There have also been adjustments made to large sites at Cairnrobin and Edzell Woods.

3.3.4 Take up of quality land for new build development for the energy industry in Aberdeen has continued through 2015 and early 2016, despite the fall in oil prices. However, this has been concentrated on sites in or around Aberdeen and commitment to these new build projects is likely to have been made prior to the downturn. There has been a fall in take up compared to the previous year when looking at Aberdeenshire only.

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 2015 and April 2016
(figures in hectares)

Employment Area	2015	2016	Change
Aberdeen City	111	64	-42%
Aberdeenshire	240	217	-10%
TOTAL	**351**	**281**	**-20%**

3.4.2 There has been a 42% decrease in the constrained land supply for Aberdeen City between April 2015 and April 2016, from 111ha to 64ha, which equates to 24% of its established supply. This decrease is largely attributable to the allocated sites at Countesswells and Rowett North moving forward with planning approvals. 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 this audit.

3.4.3 The amount of constrained land in Aberdeenshire decreased by 10% to 217ha, and makes up 39% 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. Adjustment has also been made to the area of the former Edzell Air Base (on the southern Aberdeenshire border with Angus) that had been considered part of the constrained supply, as the masterplan shows that a significant proportion of the current open and covered storage uses on the site will remain.

3.5 Marketable Land Supply

3.5.1 The marketable land supply in 2016 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 major constraints to development and could come forward within 5 years

Figure 5 - Marketable Land Supply April 2015 and April 2016 (figures in hectares)

Employment Area	2015	2016	Change
Aberdeen City	169	205	21%
Aberdeenshire	341	341	0%
TOTAL	**510**	**546**	**7%**

3.5.2 The marketable land supply in Aberdeen City has increased from April 2015 to April 2016 by a net amount of 21% to 205ha. Areas of land have been taken up or are under construction, and other sites have entered the marketable supply. In particular, the sites at Countesswells and Rowett North are now marketable. In Aberdeenshire there has been no net change in the marketable supply of land, as land taken up has been replaced by new marketable land entering the supply, in particular areas of the large Cairnrobin employment site near Portlethen.

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 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 16ha 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. 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 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 2016 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 Land Supply April 2015 and April 2016 (figures in hectares)

Employment Area	2015	2016	Change
Aberdeen City	71	46	-35%
Aberdeenshire	60	70	17%
TOTAL	**131**	**116**	**-11%**

3.6.2 The supply of immediately available land in Aberdeen City has decreased by 35% to 46ha in April 2016 as a result of sites at the Airport, Dyce Drive progressing.

3.6.3 In Aberdeenshire there has been a net increase of 17% in the supply of immediately available land to 70ha as sites come forward for potential development. Much of the immediately available land is concentrated relatively close to Aberdeen at Westhill, Portlethen and Ellon, but there are also a number of sites in other areas of Aberdeenshire, such as Macduff, Peterhead and Fraserburgh.

3.6.4 Overall some 40% of all immediately available land is currently located within Aberdeen City and 60% within Aberdeenshire. 17% of the established supply of land in Aberdeen City is immediately available compared with 13% in Aberdeenshire, reflecting the stronger demand in the City. Over two thirds (47ha) of the immediately available land in Aberdeenshire is situated within an 18 mile radius of Aberdeen.

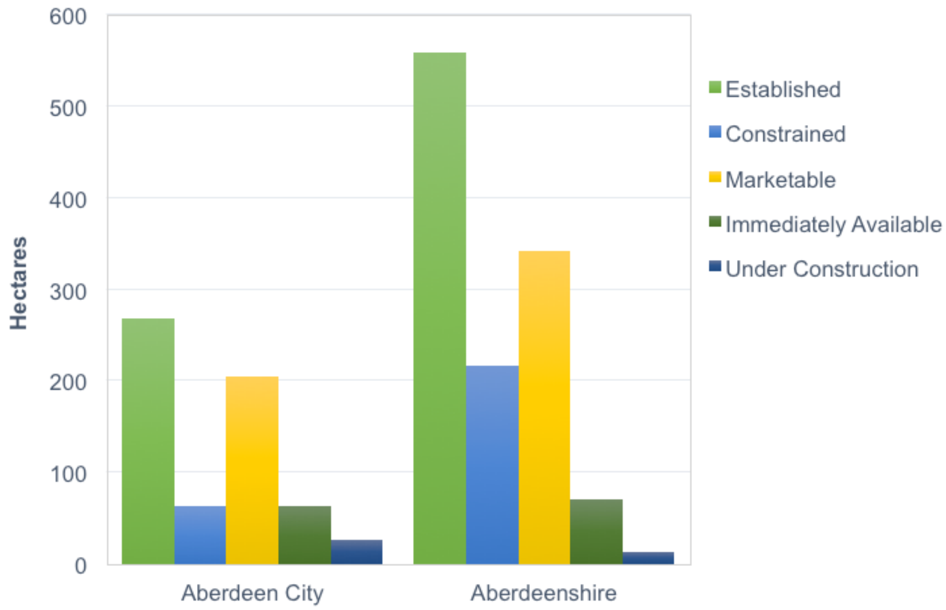
3.7 Under Construction

3.7.1 Land under construction is not included in the above categories, as it is neither available nor considered as developed. On completion it will, however, be reflected in the historical development rates for next year's audit. Land under construction is identified in Appendices 2 and 3 of the Audit. At April 2016 there were 27 hectares of employment land under construction in Aberdeen and 13 hectares of land under construction in Aberdeenshire.

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 2016



4. ANALYSIS OF TRENDS

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

4.1.1 In 2015/16, 9ha of employment land was developed in Aberdeenshire, falling below an average development rate of 15ha per year for the previous 10 years. A further 13ha are currently under construction (April 2016). In Aberdeen City, 15ha of land has been completed over the past year, well above an average development rate of 6ha per year for the previous 10 years. A further 27ha are currently under construction (April 2016), some of which remains under construction for a second year.

4.1.2 Over the period April 2015 to March 2016 the price of Brent Crude fluctuated between $64 and $30 per barrel. More recently from April to September 2016 it has steadied slightly at an average of $46. This compares with a level consistently over $100 per barrel from 2011 through to late 2014. In response, the oil and gas industry continues to postpone expansion plans and reduce overheads, which has resulted in significant job losses affecting many companies based in Aberdeen and the North East of Scotland.

4.1.3 Despite the continued low oil price, a good level of employment land take up has continued for new build developments in the City where it is thought that commitment to these projects were still largely made prior to the downturn. In addition, oil and gas industry occupiers will prefer good quality new build space, which it is possible to now obtain on much more favourable lease terms for the tenant. Several occupiers of new buildings have already sought to sublet the vacant space that they secured prior to the downturn but no longer require. This situation will have more of an adverse impact in the market for existing secondary stock than the take up of employment land for new build developments.

[3] *Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2016 ; Ryden 78th Scottish Property Review April 2016; Ryden 79th Scottish Property Review October 2016*

4.1.4 Within Aberdeenshire the majority of the new build development has taken place or is under construction on LDP employment land sites at Westhill, Portlethen and Kintore. At Westhill there has been continued expansion of the Kingshill Commercial Park and Silvertrees Business Parks at Arnhall, but at a slower pace than previous years. At Portlethen there has been further expansion at Badentoy North, where the construction of an access road has opened up land to the north of the Badentoy Industrial Estate. High quality office space has been completed on the City South Business Park at Portlethen. Development of the first phase of Midmill Business Park at Kintore is complete, and a large office premises is now under construction on the adjacent Kintore East site. 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, D2 and Prime Four. 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
Annan House, Palmerston Road (North Dee Business District)	Offices 13,500 sq.m	0.415 hectares	Completed 2015/16
Ardent House, North Esplanade West (North Dee Business Quarter)	Offices 21,101 sq.m	1.17 hectares	Completed 2015/16
Liberty House, Palmerston Place (North Dee Business District)	Offices	0.12 hectares	Site cleared
The Capitol, 431 Union Street	Offices	0.18 hectares	Completed 2015/2016

Marischal Square, Broad Street	Mixed use including 16,100 sq.m offices	1.73 hectares	Under construction
The Silver Fin, 445-461 Union Street	Offices 12,300 sq m	0.23 hectares	Under construction

4.2 Office Space - Market Activity

4.2.1 Local agents report that the office market in Aberdeen continues to adjust as new developments committed to prior to the downturn in the oil and gas industry are delivered into a much weaker occupier market. Aberdeen office supply has significantly exceeded demand through 2015 and into 2016, the opposite of the situation prior to 2014 when there was soaring demand from occupiers and a lack of stock. There is now a large amount of Grade A stock facing limited take up, there is pressure on rental levels, and tenants are being offered favourable incentives. Occupiers currently in secondary stock are expected to take advantage and relocate to better, newer stock which will continue to increase the supply in the secondary market where there is already a large amount of vacant space.

Speculative build in the city centre has continued with a number of developments, notably the recently completed Capitol as well as the Marischal Square and Silver Fin developments scheduled to complete in 2017, but others have been put on hold. New developments outside of the city centre have largely been occupied as a result of pre-lets agreed prior to the downturn. Where recent occupiers of new Grade A offices now have a reduced requirement for space, they have sought to sub-let, adding to the over-supply of office space.

Local agents confirm that the most notable change in the over-supply of available office space is that it now includes a much higher proportion of Grade A accommodation at nearly 30%. They comment that while the market could change quickly, without significant new levels of investment by the oil and gas industry this is unlikely to happen over the next few years. However, the construction of new accommodation is still seen as important to Aberdeen maintaining its leading position as an energy hub in the future.

The overall supply of office space in Aberdeen has increased significantly over the year. Knight Frank report that in 2015 availability in Aberdeen had risen to 170,000 sq m, the highest recorded level, and that Grade A space in particular had risen seven-fold to 48,900 sq m by the end of 2015. Reports from Ryden suggest that overall office supply had increased further into 2016 and stood at 252,000 sq m by October 2016. Figure 9 below shows both the increase in supply of office space and the fall in take up over the past two years as a result of the downturn in the oil industry.

With such significant levels of good quality new and second hand office stock available in prime locations, there is likely to be an impact on the building of new office developments over the next few years and a slowdown in the take up of employment land in and around Aberdeen.

Figure 9: Aberdeen Office Supply and Take Up

Source: Ryden, 79th Property Review, pg9, October 2016

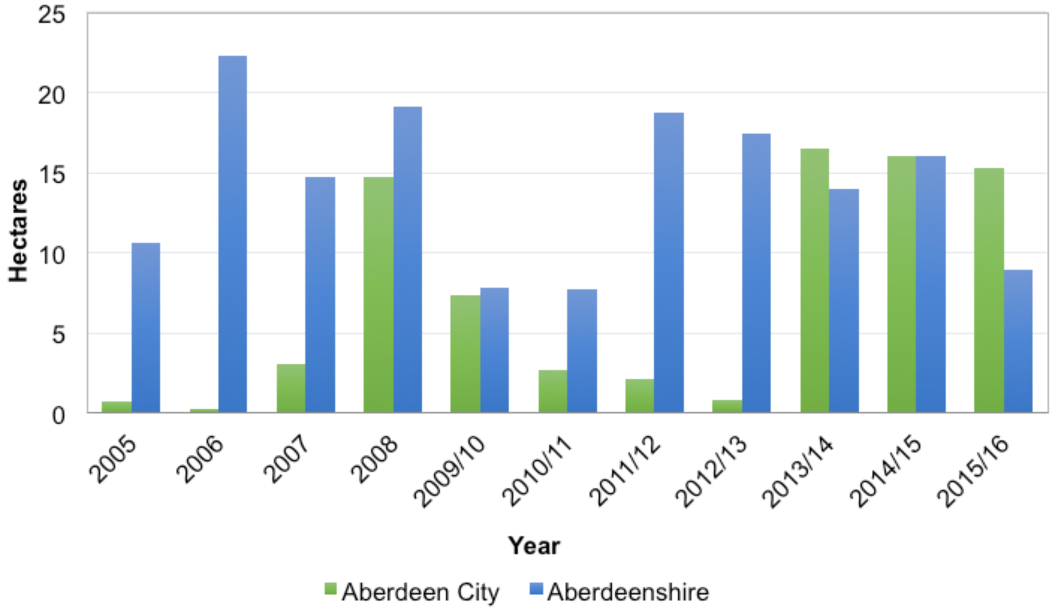
4.3 Industrial Space - Market Activity

4.3.1 Local agents report that the industrial market has also experienced a challenging year, take up has been slow and supply continues to outstrip demand. Rental levels have remained stable, but landlords have had to offer shorter lease terms and other incentives. However, some developers have still commenced speculative industrial development projects in Aberdeen and the near vicinity during 2015/16 and a number of occupiers have moved to these new build properties because they provide good quality industrial accommodation that better suit their requirements. For example, some recently built units at Gateway Business Park, Aberdeen and Kingshill Commercial Park, Westhill are now reported to have been let and the developers here are expected to press ahead with some further speculative build.

Reports from Ryden indicate that the overall supply of industrial space in Aberdeen rose by 35% over 2015/2016 from 63,242 sq m to 85,560 sq m, and that it has since risen by an additional 55% to 132,372 sq m by October 2016. In view of this a reduction in the take up of employment land for new build industrial uses over the next few years is also considered likely.

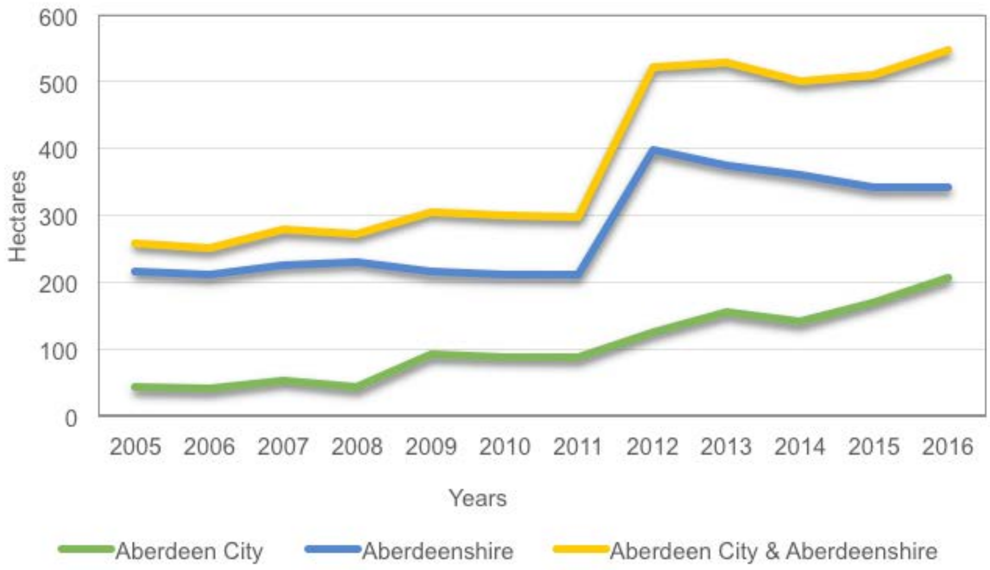
4.4 Trends in Employment Land

Figure 10 - Employment Land Development Rates 2005-2015/16



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 past 3 years with substantial rates of take up in Aberdeen City where rapid development has taken place on many of the large employment sites allocated in the LDP. Take up of employment land can be seen to have dropped back to during 2015/16 in Aberdeenshire compared to recent years, most likely linked to the downturn in the energy industry. A reduction in take up is expected over the next few years in both Aberdeen City and Aberdeenshire while there remains a significant over-supply of existing office and industrial space. NB: The monitored period for the Employment Land Audit changed from a calendar year to April-March in 2009.

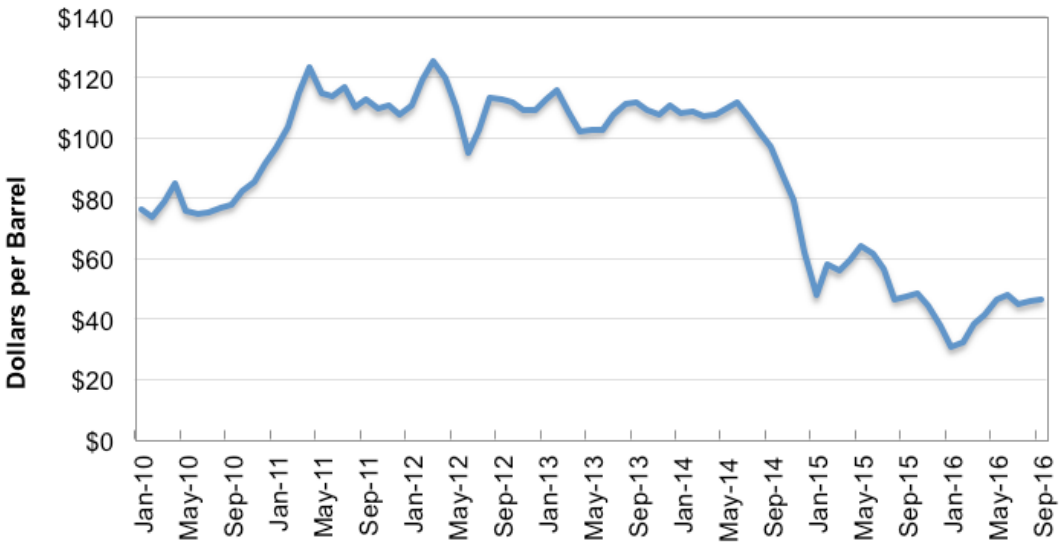
Figure 11: Trends in Marketable Employment Land in Aberdeen City and Shire 2005-2016



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, an anticipated reduction in new build construction as a result of the prolonged downturn in the oil and gas industry may see fewer marketable sites coming forward and existing sites being taken up at a slower rate.

4.4.3 Figure 12 below shows the dramatic fall in the price of Brent Crude from the second half of 2014, the effects of which are beginning to manifest in terms of the rate of take up of employment land in Aberdeen City and Aberdeenshire. In addition, local agents have reported an oversupply of office and industrial space in both the new build and secondary markets. Demand for new build development is expected to fall in the future as the energy industry continues to consolidate in response to the prevailing low oil price. Development on a number of sites appears to have stopped or slowed down recently in reaction to conditions in the oil and gas sector.

Figure 12: Europe Brent Crude Price January 2010 – September 2016



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.

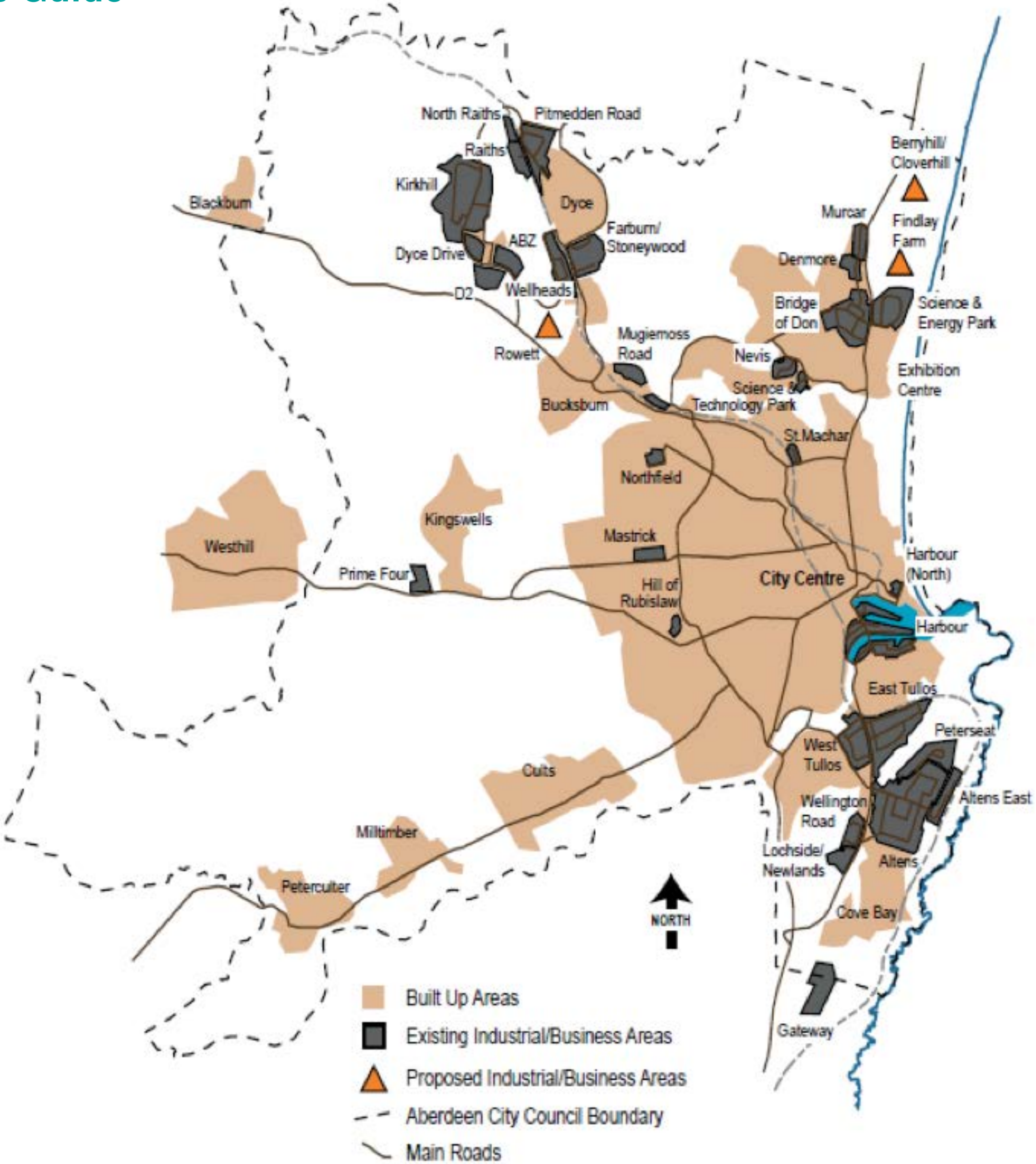
Development Rates

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
Lochside/Newlands (Balmoral Business Pk)	Balmoral Group	None	Yes	2.2	0	2.2	2.2	0
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	8.2	0	8.2	8.2	2.7
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	60.2	30.1	30.1	21.5	17.2
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	0	34.5	0	0
Prime Four	Drum		Part	16.5	0	15.8	0	6.6
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	0	10.0	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	**268.9**	**63.6**	**205.3**	**46.4**	**26.5**

Aberdeen City Industrial and Business Areas 2015-16
From Aberdeen City Council Industrial Areas Guide



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	0.0	1.0	0.0	0.0
Cairnbulg/ Inverallochy	B/CI/E/001	Cairnbulg Harbour	E1	Private	Other	Yes	0.5	0.5	0.0	0.0	0.0
Fraserburgh	B/FR/E/002	West Shore	BUS1	Aberdeenshire Council		Yes	0.3	0.0	0.3	0.3	0.0
Fraserburgh	B/FR/E/003a	Fairney Hill Business Park Ph 2		Aberdeenshire Council		No	1.9	0.0	1.9	0.0	0.0
Fraserburgh	B/FR/E/003b	Chapelhill Rosehearty/ Watermill	BUS2	Private	Infrastructure	Part	10.1	10.1	0.0	0.0	0.0
Fraserburgh	B/FR/E/007	Fairney Business Park	BUS1	Aberdeenshire Council		Yes	1.2	0.0	1.2	1.2	0.0
Fraserburgh	B/FR/E/008	Phingask	E1	Private	Physical, Marketability	No	16.5	16.5	0.0	0.0	0.0
Fraserburgh	B/FR/E/009	Kirkton Development	M1	Private	Infrastructure	No	4.0	4.0	0.0	0.0	0.0
Inverboyndie	B/IB/E/002	Inverboyndie- Phase 1	BUS1	Private		Yes	1.4	0.0	1.4	1.4	0.0
Inverboyndie	B/IB/E/003	Inverboyndie- Phase 2	BUS1	Private		No	1.4	0.0	1.4	0.0	0.0
Macduff	B/MC/E/001	Buchan Road - East	BUS1	Aberdeenshire Council			1.0	0.0	1.0	1.0	0.0
Macduff	B/MC/E/003	Tarlair Business Park	BUS2	Aberdeenshire Council		Yes	4.9	0.0	4.9	4.9	0.0
Macduff	B/MC/E/004	Buchan Road- West	BUS2	Private	Ownership	No	4.0	4.0	0.0	0.0	0.0
Macduff	B/MC/E/005	Green Hills	E1	Private		No	12.0	0.0	12.0	0.0	0.0
Rosehearty	B/RH/E/001	South of Ritchie Road	M1	Private	Infrastructure	No	2.0	2.0	0.0	0.0	0.0
						BANFF AND BUCHAN TOTAL	**62.2**	**37.2**	**25.0**	**8.8**	**0.0**

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
BUCHAN											
Ardallie	U/AD/E/001	Ardallie ALDP M1 (Land at Nether Backhill)	M1	Private	Physical	No	0.3	0.3	0.0	0.0	0.0
Auchnagatt	U/AG/E/001	Auchnagatt ALDP M1 (Adj A948)	M1	Private		No	0.5	0.0	0.5	0.0	0.0
Crimond	U/CM/E/001	Crimond ALDP E1	E1	Private		No	6.0	0.0	6.0	0.0	0.0
Cruden Bay	U/CR/E/001	Cruden Bay ALDP M1 (Land West of Golf Road)	M1	Private	Other	No	2.0	2.0	0.0	0.0	0.0
Hatton	U/HT/E/001	Hatton ALDP E1	E1	A Wyness & Sons		No	0.8	0.0	0.8	0.0	0.0
Longside	U/LG/E/001	Longside - Inverquhomery Road	BUS1	Private		No	1.2	0.0	1.2	0.0	0.0
Longside	U/LG/E/002	Longside ALDP M1	M1	Chap Homes	Other	No	1.7	1.7	0.0	0.0	0.0
Mintlaw	U/ML/E/003	Mintlaw - Aden Business Park	BUS1	Aberdeenshire Council		No	0.9	0.0	0.9	0.0	0.0
Mintlaw	U/ML/E/005	Mintlaw ALDP M1 (Nether Aden)	M1	Bancon Homes	Other	No	5.0	5.0	0.0	0.0	0.0
	U/PH/U/001	Peterhead - Blackhouse	BUS1	Aberdeenshire Council		Yes	0.0	0.0	0.0	0.0	0.3
Peterhead	U/PH/E/002	Peterhead - Balmoor	BUS2	Aberdeenshire Council		Yes	0.8	0.0	0.8	0.8	0.9
Peterhead	U/PH/E/003	Peterhead - Dales Industrial Estate West	BUS3/BUS4	Aberdeenshire Council		Part	8.8	1.9	6.8	2.1	0.0
Peterhead	U/PH/E/004a	Peterhead - Dales Industrial Estate East	BUS4	Private		Part	1.7	0.0	1.7	1.7	0.0
Peterhead	U/PH/E/005a	Peterhead - Damhead/ Upperton Industrial Estate North	BUS4/BUS6	Private		Part	2.8	0.0	2.8	0.0	0.0
Peterhead	U/PH/E/006	Peterhead - Energetica Industry Park (Upperton Ind Est)	BUS6/BUS7	Scottish Enterprise		No	16.6	0.0	16.6	0.0	0.0
Peterhead	U/PH/E/007	Peterhead - Wellbank	BUS5	Score Group Ltd	Other	Part	26.9	9.9	17.0	0.0	0.0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Peterhead	U/PH/E/008	Peterhead - Invernettie Roundabout/South Road		Private		Part	0.4	0.0	0.4	0.4	0.0
Peterhead	U/PH/E/009	Peterhead ALDP M1 (Waterside)	M1	Private	Other	No	4.0	4.0	0.0	0.0	0.0
Peterhead	U/PH/E/010	Peterhead ALDP E1 (Wellbank)	E1	Score Group Ltd		Part	7.8	0.0	7.8	0.0	0.0
						BUCHAN TOTAL	**88.1**	**24.8**	**63.3**	**5.0**	**1.2**

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	0.0
Blackdog	F/BD/E/001	Blackdog	M1	Private	Infrastructure, Other	No	4.0	4.0	0.0	0.0	0.0
Cuminestown	F/CT/E/001	Cuminestown Industrial Estate	BUS1	Aberdeenshire Council	Marketability, Other	No	0.5	0.5	0.0	0.0	0.0
Ellon	F/EL/E/005	Balmacassie South	BUS1			Yes	5.3	0.0	5.3	5.3	0.0
Ellon	F/EL/E/006	Cassiegills	E1	Private		No	9.0	0.0	9.0	0.0	0.0
Ellon	F/EL/E/007	Cromleybank	M1	Scotia Homes	Other	No	2.0	2.0	0.0	0.0	0.0
Foveran	F/FV/E/001	South of Westfield	M1	Harper & Cochrane Ltd		No	2.0	0.0	2.0	0.0	0.0
Foveran	F/FV/E/002	Roadside Croft	E1	Private		No	1.5	0.0	1.5	0.0	0.0
Newburgh	F/NB/E/002	Loanhead Phase 2	BUS1	Private		No	2.0	0.0	2.0	0.0	0.0
Newburgh	F/NB/E/007	East of Parkview	M1	Private		No	1.5	0.0	1.5	0.0	0.0
Oldmeldrum	F/OM/E/003b	Oldmeldrum Business Park/ Meadows Industrial Estate	BUS2	Private		Part	3.2	0.0	3.2	3.2	0.0
Oldmeldrum	F/OM/E/005	North Of Meldrum Academy	M2	Private	Other	No	2.1	2.1	0.0	0.0	0.0
Pitmedden	F/PM/E/001	Milldale East	BUS2	Private	Ownership, Infrastructure	No	1.6	1.6	0.0	0.0	0.0
Rothienorman	F/RO/E/002	Rothienorman West Of B9001	BUS1	Private	Marketability	No	1.2	1.2	0.0	0.0	0.0
Rashiereive	F/RR/E/001	West of Rashiereive Cottages	E1	Private		No	2.0	0.0	2.0	0.0	0.0
Turriff	F/TF/E/001	Markethill North	BUS1	Aberdeenshire Council		Yes	0.2	0.0	0.2	0.2	0.0
Turriff	F/TF/E/004	East Of Markethill Industrial Estate	BUS1	Private		No	2.0	0.0	2.0	0.0	0.0
Turriff	F/TF/E/005	South Of Markethill Road	BUS1		Ownership	Yes	0.7	0.7	0.0	0.0	0.0
Turriff	F/TF/E/007	Markethill Crofts North	E1	Private		No	1.0	0.0	1.0	0.0	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	0.0	1.7	0.0	0.0
Turriff	F/TF/E/009	Broomhill Road	E3	Private		No	4.5	0.0	4.5	0.0	0.0
Turriff	F/TF/E/010	Balmellie Crofts	M1	Private	Other	No	10.0	10.0	0.0	0.0	0.0
Tarves	F/TV/E/003	Braiklay Cottages	M1	Private	Other	No	3.0	3.0	0.0	0.0	0.0
Udny Station	F/US/E/001	East of Woodlea Grove	M1	Private	Ownership	No	1.0	0.0	1.0	0.0	0.0
Westfield	F/WF/E/001	Westfield Foveran	E1	Private		No	2.0	0.0	2.0	0.0	0.0
						FORMARTINE TOTAL	**69.4**	**27.7**	**41.7**	**11.5**	**0.0**

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
GARIOCH											
Blackburn	G/BB/E/004	Blackburn - Kinellar Business Park	BUS	Private		Part	1.0	0.0	1.0	1.0	0.0
Insch	G/IS/E/005	Insch - Muiryheadless	BUS	Aberdeenshire Council		Yes	2.1	0.0	2.1	2.1	0.2
Insch	G/IS/E/006	Insch - South Of Muiryheadless	BUS	Private	Ownership	No	2.2	2.2	0.0	0.0	0.0
Insch	G/IS/E/007	Insch ALDP E1	E1	Private		No	5.0	0.0	5.0	0.0	0.0
Inverurie	G/IV/E/005c	Port Elphinstone North	BUS6	Private	Contamination	No	2.5	2.5	0.0	0.0	0.0
Inverurie	G/IV/E/008	Inverurie - Fairholme/ Highclere	BUS3	Private		Yes	0.6	0.0	0.6	0.6	0.7
Inverurie	G/IV/E/009	Inverurie East	BUS11		Other	No	0.7	0.7	0.0	0.0	0.0
Inverurie	G/IV/E/012	Inverurie ALDP M2 (Harlaw Road)	M2	Private/Aberdeenshire Council		No	0.5	0.0	0.5	0.0	0.0
Inverurie	G/IV/E/013	Inverurie ALDP E1	E1	Crichie Dev Ltd/Dandara		No	15.5	0.0	15.5	0.0	0.0
Inverurie	G/IV/E/014	Inverurie ALDP E2	E2	ANM Group Ltd		No	1.5	0.0	1.5	0.0	0.0
Inverurie	G/IV/E/015	Inverurie ALDP E3	E3	ANM Group Ltd		No	10.0	0.0	10.0	0.0	0.0
Inverurie	G/IV/E/016	Inverurie - Port Elphinstone Central	BUS7	Kilbride Resources Ltd		No	2.5	0.0	2.5	0.0	0.0
Inverurie	G/IV/E/017	Inverurie - Crichiebank Business Centre	BUS5	Private		Part	1.1	0.0	1.1	0.0	0.0
Inverurie	G/IV/E/018	Inverurie - Kirkwood Commercial Park, Thainstone		Kirkwood Investments Ltd		Yes	1.7	0.0	1.7	1.7	1.3
Kemnay	G/KM/E/002	Kemnay - Dalmadilly	BUS1	Private	Ownership	No	4.3	4.3	0.0	0.0	0.0
Kemnay	G/KM/E/004	Kemnay East	BUS2	Private		Part	2.8	0.0	2.8	0.0	0.0
Kingseat	G/KS/E/001x	Kingseat	BUS1	Manor Kingdom	Land Use	Part	1.0	1.0	0.0	0.0	0.0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Kintore	G/KT/E/002	Kintore - Midmill North	BUS3	Private		Yes	0.9	0.0	0.9	0.9	0.0
Kintore	G/KT/E/002b	Kintore North/Bridgend	BUS2	Private	Physical	No	5.0	2.5	2.5	0.0	0.0
Kintore	G/KT/E/003b	Kintore Business Park	BUS1	Private		Yes	0.6	0.0	0.6	0.0	0.0
Kintore	G/KT/E/004	Kintore ALDP M1	M1	Kintore Consortium		Yes	0.0	0.0	0.0	0.0	4.9
Millbank	G/MB/E/003	Millbank Mixed Use Site M1	M1	Cluny Estates	Infrastructure	No	1.3	1.3	0.0	0.0	0.0
Newmachar	G/NM/E/003	Newmachar ALDP E1	E1	Kirkwood Homes		No	5.0	0.0	5.0	0.0	0.0
Westhill	G/WH/E/007	Westhill - Arnhall Business Park Ph2	BUS	Private		Yes	1.6	0.0	1.6	1.6	0.0
Westhill	G/WH/E/008	Westhill ALDP E1	E1	Westhill Dev Co Ltd		Yes	6.5	0.0	6.5	6.5	0.0
Westhill	G/WH/E/009	Westhill - Former Blockworks site		Private		Part	1.4	0.0	1.4	1.4	0.0
						GARIOCH TOTAL	**77.3**	**14.5**	**62.8**	**15.8**	**7.1**

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
KINCARDINE AND MEARNS											
Auchenblae	K/AU/E/001	Auchenblae ALDP M1 (Hillview)	M1	Kincardineshire Investment Co	Other	No	1.0	1.0	0.0	0.0	0.0
	K/CH/E/001	Chapleton - New Settlement	M1	Elsick Dev Co Ltd		No	11.5	0.0	11.5	0.0	0.0
Drumlithie	K/DL/E/001	Drumlithie ALDP M1 (Land Adj Bowling Green)	M1	Peterkin Homes Ltd		No	0.5	0.0	0.5	0.0	0.0
Edzell Woods	K/EW/E/001	Edzell Woods ALDP M1 (Former Edzell Airfield)	M1	Carnegie Base Services	Marketability, Infrastructure	No	70.0	67.0	3.0	3.0	0.0
Gourdon	K/GD/E/001	Gourdon Business Park	BUS	Aberdeenshire Council		Yes	1.3	0.0	1.3	1.3	0.2
Gourdon	K/GD/E/002	Gourdon ALDP E1	E1	Private		No	3.0	0.0	3.0	0.0	0.0
Laurencekirk	K/LK/E/004	Laurencekirk - Mart Site West		Aberdeenshire Council		Yes	0.1	0.0	0.1	0.1	0.0
Laurencekirk	K/LK/E/005	Laurencekirk ALDP M1 (Conveth Mains)	M1	Kirkwood Homes		No	11.0	0.0	11.0	0.0	0.0
Luthermuir	K/LM/E/001	Luthermuir ALDP M1	M1	Private	Other	No	0.3	0.3	0.0	0.0	0.0
Luthermuir	K/LM/E/002	Luthermuir ALDP M2	M2	Private	Other	No	0.3	0.3	0.0	0.0	0.0
Marykirk	K/MK/E/001	Marykirk ALDP M1 (West Park)	M1	Private		No	0.5	0.0	0.5	0.0	0.0
Newtonhill	K/NH/E/001	Newtonhill - West Monduff Farm	BUS	A&D Developments (Scotland) Ltd		No	7.2	0.0	7.2	0.0	0.0
Newtonhill	K/NH/E/002	Newtonhill ALDP E1	E1	Elsick Dev Co Ltd		No	11.5	0.0	11.5	0.0	0.0
Portlethen	K/PL/E/004	Portlethen - Badentoy Industrial Park	BUS1	Badentoy Developments Ltd		Yes	7.7	0.0	7.7	1.2	2.3
Portlethen	K/PL/E/005	Portlethen - City South Business Park	BUS2	Dandara		Part	10.6	0.0	10.6	10.6	0.0
Portlethen	K/PL/E/006	Portlethen - Mains Of Cairnrobin	BUS	Private	Other	Part	59.5	37.0	22.5	0.0	0.0
Portlethen	K/PL/E/007	Portlethen - Moss Side	BUS	Private		Yes	1.0	0.0	1.0	0.0	1.4
Portlethen	K/PL/E/008	Portlethen ALDP E1	E1	Private		No	6.5	0.0	6.5	0.0	0.0
Portlethen	K/PL/E/009	Porthlethen ALDP E2	E2	Private		No	7.0	0.0	7.0	7.0	0.0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
St Cyrus	K/SC/E/001	St Cyrus/Lochside ALDP M1 (Adjacent A92)	M1	Private		No	2.0	0.0	2.0	0.0	0.0
Stonehaven	K/ST/E/003	Stonehaven - East Newtonleys	BUS2	Bancon Developments		No	11.3	0.0	11.3	0.0	0.0
Stonehaven	K/ST/E/004	Stonehaven ALDP E2	E2	Bancon Developments		No	7.0	0.0	7.0	0.0	0.0
Stonehaven	K/ST/E/005	Stonehaven ALDP E1	E1	Private		No	1.0	0.0	1.0	0.0	0.0
						KINCARDINE AND MEARNS TOTAL	**231.8**	**105.5**	**126.3**	**23.2**	**4.0**

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
MARR											
Aboyne	M/AB/E/004	Aboyne West	M1	Private	Other	No	1.0	1.0	0.0	0.0	0.0
Alford	M/AF/E/002b	Alford Business Park	M2	Kirkwood Homes		No	1.1	0.0	1.1	0.0	0.0
Alford	M/AF/E/003	Academy Site	M1	Aberdeenshire Council	Ownership	Yes	1.2	1.2	0.0	0.0	0.0
Banchory	M/BN/E/002	Hill Of Banchory	BUS1	Bancon Developments		Yes	6.0	0.0	6.0	4.4	0.1
Banchory	M/BN/E/003	Burn O'Bennie	BUS2	Bancon Developments		No	2.2	0.0	2.2	0.0	0.0
Banchory	M/BN/E/004	Lochton of Leys	M2	Private	Other	No	2.0	2.0	0.0	0.0	0.0
Huntly	M/HT/E/002	Depot Road	BUS2	RB Farquhar		Yes	0.9	0.0	0.9	0.9	0.7
Huntly	M/HT/E/004a	Muckle Torry Hillock North	BUS1	Private		No	1.8	0.0	1.8	0.0	0.0
Huntly	M/HT/E/005	Mart	BUS3	Private		No	3.3	0.0	3.3	0.0	0.0
Huntly	M/HT/E/006	Adj Linnorie	E1	Private		No	4.5	0.0	4.5	0.0	0.0
Kennethmont	M/KM/E/001	Opposite School	E1	Private		No	0.6	0.0	0.6	0.0	0.0
Kincardine O'Neil	M/KN/E/001	Dee Street	M1	Private	Other	No	0.8	0.8	0.0	0.0	0.0
Kincardine O'Neil	M/KN/E/002	Willowbank	E1		Ownership	No	0.8	0.8	0.0	0.0	0.0
Lunsden	M/LD/E/002	Lumsden	BUS	Private		No	0.3	0.0	0.3	0.0	0.0
Muir of Fowlis	M/MF/E/001	Muir Of Fowlis	BUS	Private		No	0.3	0.0	0.3	0.0	0.0
Rhynie	M/RN/E/001	Rhynie Richmond Avenue East	BUS	Aberdeenshire Council		Yes	0.2	0.0	0.2	0.2	0.0
Rhynie	M/RN/E/002	Rhynie Richmond Avenue West	M1	Private	Other	No	0.6	0.6	0.0	0.0	0.0
Tarland	M/TL/E/002	Burnside Road	M1	Private	Other	No	1.0	1.0	0.0	0.0	0.0
Torphins	M/TP/E/001	South Of A980	BUS	Private		No	1.2	0.0	1.2	0.0	0.0
						MARR TOTAL	**29.7**	**7.4**	**22.3**	**5.5**	**0.8**
REPORT TOTAL							**558.4**	**217.1**	**341.3**	**69.7**	**13.1**

APPENDIX 4: Strategic Growth Areas and Regeneration Priority Areas in Aberdeenshire 2016 (all figures in hectares)

SETTLEMENT	ESTAB	CONST	MARKET	IMM/AVAIL	UC
STRATEGIC GROWTH AREAS					
Ellon - Blackdog	33.2	8.6	24.6	8.1	0.0
Peterhead - Hatton	70.5	15.8	54.6	5.0	1.2
Total	**103.7**	**24.4**	**79.3**	**13.1**	**1.2**
Huntly - Pitcaple	19.7	2.2	17.5	3.0	0.9
Inverurie-Blackburn	44.1	5.7	38.4	4.2	6.9
Total	**63.8**	**7.9**	**55.9**	**7.2**	**7.8**
Portlethen-Stonehaven	141.9	37.0	104.9	18.8	3.7
Sth of Drunmlithie-Laurencekirk	11.1	0.0	11.1	0.1	0.0
Total	**153.0**	**37.0**	**116.0**	**18.9**	**3.7**
Aberdeen HMA Local Growth	38.2	13.3	24.9	12.7	0.0
Rural HMA Local Growth	199.7	134.5	65.3	17.8	0.3
Report Total	**558.4**	**217.1**	**341.3**	**69.7**	**13.1**

REGENERATION PRIORITY AREAS					
Regeneration Priority Area	135.8	53.0	82.9	12.7	1.2
Outwith Regeneration Priority Area	422.6	164.1	258.5	57.0	11.8
Report Total	**558.4**	**217.1**	**341.3**	**69.7**	**13.1**

Strategic Growth and Regeneration Priority Areas in Aberdeenshire

APPENDIX 5: Development Rates in Aberdeen City 2016(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	2015
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	-	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**	**1.9**
9. Links Road	0.6	0.3	-	-	0.9	-	-	-	-	-	-	-	-	-	-	-	-	-
10. Mastrick	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
11. Northfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
12. St Machar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kingswells (Prime Four)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	6.8	6.8	6.6
Sub Total	**0.6**	**0.3**	**-**	**-**	**0.9**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
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	**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**	**6.8**

SITE LOCATION	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
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**	**15.3**

Development Rates in Aberdeenshire 2016(all figures in hectares)

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

SITE LOCATION	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Balmedie	0.0	0.0	0.5	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	0.0
Banchory	0.0	0.0	0.0	0.0	0.0	0.6	3.3	0.9	0.0	0.0	0.1	0.0
Blackburn	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	2.1	0.4	0.0
Boyndie	0.0	0.0	0.0	0.0	0.0	0.8	0.0	1.9	3.3	0.0	3.0	0.0
Ellon	0.3	0.4	0.0	5.6	0.0	0.0	1.8	1.4	1.9	2.2	0.0	1.1
Fraserburgh	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.9	1.3
Gourdon	0.1	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Huntly	0.0	0.0	5.5	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0
Insch	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.5	0.7	0.0	0.2	0.0
Inverurie	2.2	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kintore	0.4	0.2	0.0	1.1	0.0	2.7	0.0	7.8	2.1	3.0	1.5	1.0
Laurencekirk	0.3	0.0	0.1	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.2
Macduff	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.3
Mintlaw	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Newburgh	0.0	0.0	0.0	0.8	0.5	0.2	0.0	0.2	0.0	0.0	0.0	0.0
Oldmeldrum	1.3	1.5	0.4	0.0	0.0	0.0	0.0	0.3	2.8	1.9	0.0	0.4
Peterhead	0.7	5.0	0.0	0.2	0.7	0.1	0.0	1.4	1.1	0.0	2.8	0.0
Port Elphinstone	0.0	1.4	0.9	1.3	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0
Portlethen	5.6	0.8	10.6	4.4	1.3	0.7	2.4	0.3	0.3	0.4	4.3	3.6
Turriff	0.0	0.2	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Westhill	1.0	0.9	4.1	0.6	14.7	3.1	0.3	2.5	2.7	1.5	3.0	1.1
Report Total	**13.4**	**10.6**	**22.3**	**14.7**	**19.1**	**8.6**	**7.7**	**18.7**	**17.4**	**14.1**	**16.1**	**8.9**

The Employment Land Audit is available from:

www.aberdeencity.gov.uk

www.aberdeenshire.gov.uk

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