EMPLOYMENT LAND AUDIT 2014

A joint publication by Aberdeen City Council and Aberdeenshire Council

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ABERDEEN CITY AND SHIRE | *Strategic Development Planning Authority*

EMPLOYMENT LAND AUDIT 2014

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 is produced by officials of Aberdeen City and Aberdeenshire Councils, in consultation with Scottish Enterprise, the Strategic Development Planning Authority (SDPA) and representatives from the private sector. The audit supports the strategic priorities of the Scottish Government Economic Strategy and the Economic Action Plan for Aberdeen City and Shire, published by ACSEF in 2013, and the Aberdeen City and Shire Strategic Development Plan (2014). The definitions used and the form of the audit are consistent with Scottish Planning Policy and the audit contributes to the monitoring of the councils' Local Development Plans and the Aberdeen City and Shire Strategic Development Plan (2014). The 2014 Audit has a base date of 1st April 2014. You can also view the Employment Land Audit document on the councils' websites at:

www.aberdeencity.gov.uk/localdevelopmentplan
www.aberdeenshire.gov.uk/statistics/ela/index.asp

Established Supply

Between 2012 and 2013, there had been relatively little change in the established employment land supply in the two local authorities, with 272 hectares in Aberdeen City and 608 hectares in Aberdeenshire. The adoption of the respective Local Development Plans in 2012 had released a significant amount of employment land.

Between 2013 and 2014 the established supply has reduced in the City by 10% bringing the total to 246 hectares. Over the past year, 17 hectares have been completed and 34 hectares are under construction, primarily close to Aberdeen Airport and at the Prime Four Business Park. For the Shire the reduction is 2% leaving a total of 593 hectares. Over the past year, 14 hectares have been completed and a further 11 hectares are under construction, mainly at Westhill and Portlethen.

Constrained Supply

The constrained supply for Aberdeen City has remained unchanged from 2013 to 2014. Last year a significant amount of land had been removed from the constrained supply into the marketable supply, with the development of ABZ, D2 and Aberdeen International Business Parks at Dyce Drive having made rapid progress, as well as the planning of future phases at Prime Four, Kingswells. There are 89ha of constrained supply in Aberdeen, 36% of its established supply.

In Aberdeenshire, the constrained land supply has also remained constant at 234ha between 2013 and 2014, meaning 39% of the established land supply in the Shire is constrained. There has been movement of sites between the marketable and constrained supply over the year, particularly in Portlethen, but the net effect shows no overall change in the constrained supply compared to the previous year.

In general, the large amount of constrained supply in both authorities can be explained by some of the larger LDP allocations with more complex infrastructure requirements which are realistically expected to come forward in the medium rather than short term.

Marketable Supply

In Aberdeen City, the marketable supply has decreased by 16% on 2013's figures to 140ha as significant areas of land have rapidly been taken up or are under construction. In Aberdeenshire, there was a decrease of 4% in the marketable supply over the year to 360ha, the net effect of some sites having been developed and others moving between the marketable and constrained supply.

The Strategic Development Plan has a target of 60ha of marketable land being available in Aberdeen City and 60ha in the Strategic Growth Areas of Aberdeenshire at all times. The supply of marketable land in Aberdeen City and key Aberdeenshire settlements gives no cause for concern in terms of the choice of sites currently available. The supply of immediately available employment land in Aberdeen City stands at 66ha, and 40ha in Aberdeenshire. 27% of the established supply of land in Aberdeen City is immediately available compared with 7% in Aberdeenshire, perhaps reflecting the continued strength of demand in the City and rapid progress on certain sites.

Market Activity [1]

Economic activity and demand for employment space in Aberdeen remained strong through 2013 and into early 2014. This was mainly from the oil and gas sector and underpinned by a stabilised Brent Crude price of over $100 per barrel, with many occupiers seeking to expand and relocate. For example, extensive offices are being built for Aker Solutions at Aberdeen International Business Park, close to the Airport, and Premier Oil are to take new offices at Phase 2 of Prime Four, Kingswells. However, later in 2014 the Brent Crude price had fallen significantly to around $60 per barrel by December and has continued to fall in early 2015. It is not yet known how this will affect demand from the energy sector in the future.

2013/14 was the third consecutive impressive year for take up of employment space in and around Aberdeen, and development rates for employment land as shown in the Audit have increased significantly. A number of new business parks either remain under construction this year or have only recently started construction, while others have planning permission, meaning rapid take-up of employment land could continue in the short term where development is already committed. For example work is ongoing at the new business parks adjacent to the Airport (ABZ, D2 and Aberdeen International) and work was only started on site at City South, Portlethen in the second half of 2014. In addition, a number of large scale, high quality office developments have come forward on brownfield sites in the City Centre which are not identified as employment land in the audit, including a number in the North Dee Business Quarter, such as 'The Grande' office development at Poynernook Road. Demand for quality industrial premises during 2013/14 has also been good both in the City and those parts of the Shire that are close by and well connected, resulting in the take up of employment land in Blackburn, Kintore, Westhill and Portlethen.

Many international energy companies have a significant presence in and around Aberdeen City and the larger Aberdeenshire towns. Technologies developed by companies and skilled employees based in Aberdeen City & Shire, have been increasingly in demand all over the world. One of the main drivers of new office and industrial development has been the growth in international oil and gas sales, and the competition between companies to attract and retain skilled staff both locally and internationally.

[1] *Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2014; Ryden 74th Scottish Property Review April 2014; Aberdeenshire Economic Development Review 2013/14.*

Issues for the Future

With the adoption of the two Local Development Plans in 2012, there is no longer an issue with meeting the marketable employment land requirements as set by the Strategic Development Plan (2014).

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. In and around Aberdeen, demand for Grade A office space and good quality industrial premises remained high in 2013/14 and there had been a strong market for both pre-let and speculative developments. However, with the significant reduction in the oil price in the latter half of 2014, it is not known if demand will continue at this level. In many smaller towns in Aberdeenshire, speculative building involves a considerably greater financial risk to the developer and there may also be infrastructure constraints, such as roads, drainage etc that need to be overcome.

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

The Employment Land Working Group intend to review the methodology used to produce the audit from 2015 onwards in light of the requirements for Business Land Audits outlined in paragraphs 101-102 of the new Scottish Planning Policy 2014. In particular it will consider the inclusion of brownfield/ city centre redevelopment sites, as well as greenfield sites, in order to reflect a fuller picture of employment land availability.

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 and the Aberdeen City and Aberdeenshire Councils' Local Development Plans. 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, Scottish Enterprise, ACSEF and representatives of the private sector (all members of the Employment Land Working Group) 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. The audit is produced on an annual basis, this being the fourteenth in the series, the first having been published in October 2001.

2. BACKGROUND

2.1 Scotland and North East Strategies and Policies

2.1.1 The updated **Scottish Government Economic Strategy**, published in 2011, sets out the broad agenda for the Government's focus on Scotland's economy. It gives clear priority to accelerating economic recovery, with a range of measures to tackle unemployment and promote employability. It has six Strategic Priorities which will drive sustainable economic growth and develop a more resilient and adaptable economy. These are:

- Supportive Business Environment;
- Transition to a Low Carbon Economy;
- Learning, Skills and Well-being;
- Infrastructure Development and Place;
- Effective Government; and
- Equity.

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

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

2.1.3 The Scottish Government adopted the **National Planning Framework 2 (NPF2)** in June 2009. The NPF2 aims to guide Scotland's spatial development to 2030 and sets out strategic development priorities to support the Scottish Government's promotion of sustainable economic growth. This Framework takes forward the spatial aspects of the Government Economic Strategy, to ensure that each part of the country is able to play to its strengths in building a Scotland that is wealthier and fairer, smarter and greener, healthier, safer and stronger. Infrastructure development and place will be key priorities. NPF2 has subsequently been reviewed and the **National Planning Framework 3 (NPF3)** was adopted in June 2014. The NPF3 will have significant implications for the development of employment land in Aberdeen City and Shire. The Aberdeen Harbour expansion and improvements to Aberdeen Airport are included as National Developments. NPF3 also reinforces the importance of infrastructure provision, particularly improvement to transport links, such as the Aberdeen Western Peripheral Route, and major energy-related projects, including Carbon Capture and Storage technology focused on Peterhead.

2.1.4 NPF3 highlights the potential for both Aberdeen and Aberdeenshire to apply their energy sector and offshore strengths to the development of renewable and clean energy technologies. Aberdeen is focusing on strengthening its role as Scotland's northern gateway and broadening its economic base. The City Council together with partners has recently commissioned the production of a City Centre Masterplan and Delivery Programme focusing 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 provides a base from which to build a larger creative sector. **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** states that there will be a shift in regeneration working in the Council resulting in the spend and activity being focused on Fraserburgh for the next few years.

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

2.1.6 The Scottish Government's planning policy for economic development was previously set out in **Scottish Planning Policy (SPP)** published in February 2010. This has now been reviewed, and a new SPP was adopted in June 2014, alongside NPF3. The SPP (2014) asks Councils to allocate sites that meet the diverse needs of different sectors and sizes of business and to take a flexible approach, allowing changing circumstances to be accommodated and new opportunities to be realised.

2.1.7 Planning authorities should ensure that there is a range and choice of marketable sites and locations for businesses allocated in development plans, including opportunities for mixed use development, to meet anticipated requirements and a variety of size and quality requirements. Marketable land should meet business requirements, be serviced or serviceable within 5 years, be accessible by walking, cycling and public transport, and have a secure planning status. The 2014 SPP states that business land audits should be undertaken regularly to monitor sites within the existing business land supply and to inform reviews of development plans. This audit, now in its fourteenth year, 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 replaced the previous Structure Plan and 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, with 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 as well as 60ha in the strategic growth areas within Aberdeenshire.

2.2.4 The Strategic Development Plan replaced the previous Structure Plan during the period of this audit and maintains the same employment land requirements as the Structure 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 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 proposed development when making decisions in development management.

2.3.4 The new and existing employment land sites allocated in the adopted Aberdeen City and Aberdeenshire Local Development Plans have been 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.

2.4 Existing Employment Land Monitoring Arrangements

2.4.1 The audit is a record of the employment land supply in Aberdeen City and Shire at a given date. It shows the supply of marketable land as defined by SPP. It does not provide information on the range and size of individual plots within new employment areas, nor does it provide detailed information on vacant land within existing, completed sites. In addition, it does not include brownfield development sites, such as those in Aberdeen city centre. It provides a useful cross-check with Agents' Reviews and the Scottish Property Network regarding up-to-date information on sites and properties in the area and highlights areas where further work may be required. In addition, Aberdeen City Council publishes an office and hotel planning bulletin annually, which monitors the development of new Class 4 (business) uses in the City.

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

1. The 2013-2014 Aberdeen Industrial Areas Guide
2. The Aberdeenshire Business and Industrial Areas Guide 2014
3. The 2013 Scottish Annual Vacant and Derelict Land Survey (published February 2014)
4. The Aberdeen Vacant and Derelict Land Survey 2013 Report (see 'Other Related Information')
5. The Scottish Property Network
6. The Commercial Property Review for Grampian, Highlands and Tayside Regions
7. Aberdeenshire Council Industrial Property
8. Scottish Assessors Grampian Valuation Roll
9. Aberdeen City Council Office and Hotel Planning Bulletins (see 'Other Related Information')

3. EMPLOYMENT LAND AUDIT 2014

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 agreed with Scottish Enterprise and information published by the private sector, as appropriate. A meeting of the Employment Land Working Group is held in December each year to agree the figures contained in the audit and to discuss issues relating to the delivery of employment land in the region. The base date for the published data is 1 April 2014. All figures are given in hectares and are net areas unless otherwise stated.

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* contains information collated at 3 different geographical areas radiating from the City and referred to as zones 1, 2 and 3 which reflect distances from Aberdeen and to some extent, land values. *Appendix 5* presents the information for Aberdeenshire by strategic growth areas. *Appendix 6* contains information on historical employment land take-up rates in Aberdeen City and Aberdeenshire.

Figure 1 - Aberdeen City and Aberdeenshire

Based on Ordnance Survey mapping. © Crown copyright reserved. Aberdeenshire Council 0100020767 2015.

3.3 Established Employment Land Supply

3.3.1 The established employment land supply for Aberdeen City and Aberdeenshire is shown in *Figure 2*.

Figure 2 - Established Employment Land Supply 2013 and 2014 (net figures in hectares)

Employment Area	2013	2014	Change
Aberdeen City	272	246	-10%
Aberdeenshire	608	593	-2%
TOTAL	**880**	**839**	**-5%**

3.3.2 In **Aberdeen City** the level of established land supply has seen a net decrease of 10% between 2013 and 2014 to 246ha. Over the past year 17ha have been completed and 34 ha are under construction. Some of the larger sites that were under construction in 2013 and removed from the 2013 established supply remain under construction this year, meaning that the net decrease for 2014 appears lower than the pace of actual land take up in the City.

3.3.3 In **Aberdeenshire** there has been a slight decrease in the established land supply between 2013 and 2014. A total of 14ha were completed in the past year and a further 11 hectares are under construction. A number of other sites have been reassessed and re-measured resulting in an overall net decrease of only 2%.

3.3.4 Although there has been a relatively small reduction in the overall established employment land supply between 2013 and 2014 of 5%, there has been significant activity and take up of land, mainly in and around the City, some of which remains under construction for a second year. In particular there has been rapid expansion of new business parks in the vicinity of Aberdeen Airport and at Prime Four, Kingswells.

3.3.5 Demand for quality land in Aberdeen City and the surrounding towns had remained high through 2013 and early 2014. Oil prices had been high, although have dropped back significantly in the latter half of 2014, and there had been good demand from the oil and gas sector for high quality working environments in order to attract and retain staff. Across the City and Shire there are 45ha under construction, much of which is likely to be completed by next year's audit.

3.4 Constrained Employment Land Supply

3.4.1 Land that is subject to constraints in Aberdeen City and Aberdeenshire is shown in *Figure 3*.

Figure 3 - Constrained Employment Land Supply 2013 and 2014 (net figures in hectares)

Employment Area	2013	2014	Change
Aberdeen City	89	89	0%
Aberdeenshire	233	234	0%
TOTAL	**322**	**323**	**0%**

3.4.2 There has been no change in the constrained land supply for **Aberdeen City** between 2013 and 2014 remaining at 89ha which equates to 36% of its established supply. The constrained supply takes into account allocations within the Aberdeen Local Development Plan which do not currently have a Development Framework or Masterplan or are unlikely to see significant progression in the near future. The figure also takes into account employment land allocations within larger mixed use land release sites such as Grandhome and Countesswells. The employment land within such allocations will likely be delivered at a later stage of the overall development and is therefore designated as constrained within this audit.

3.4.3 The amount of constrained land in **Aberdeenshire** has also remained constant between 2013 and 2014 at 234ha, and makes up 39% of its established supply. This is the net effect of sites moving between the marketable and constained supply. For example, an access road has recently been constructed, opening up a large site north of Badentoy Industrial Park at Portlethen, removing the constraint and moving the land into the marketable supply. However, the Mains of Cairnrobin, Portlethen site comprising 37h has moved into the constrained supply this year because of transport issues. In line with the City, 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. The relatively high supply of constrained employment land in the Shire compared to the City can be partly attributed to the inclusion of an allocation of 100ha at the former Edzell Air Base (on the southern Aberdeenshire border with Angus), which has a disproportionate impact on the overall total.

3.5 Marketable Land Supply

3.5.1 The marketable land supply in 2014 is shown in *Figure 4*. These figures count land which is both immediately available and land which is not immediately available but does not face any constraints to development and could come forward within 5 years.

Figure 4 - Marketable Land Supply 2013 and 2014
(net figures in hectares)

Employment Area	2013	2014	Change
Aberdeen City	166	140	-16%
Aberdeenshire	375	360	-4%
TOTAL	**541**	**500**	**-8%**

3.5.2 The marketable land supply in **Aberdeen City** has fallen by 16% to 140ha as significant areas of land have been taken up or are under construction, largely in the vicinity of Aberdeen Airport, as well as Prime Four, Kingswells. In **Aberdeenshire** there has been a decrease of 4% in the marketable supply of land, attributable to the net effect of site take up and a number of sites moving between the constrained and marketable supply.

3.5.3 The supply of land in Aberdeen City and key Aberdeenshire settlements gives no cause for concern in terms of the choice of sites currently available. Aberdeen City and Aberdeenshire currently have an adequate choice and supply of marketable land, following both Councils having adopted their Local Development Plans in 2012. 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 quickly while large allocations of land in the north of Aberdeenshire are taken up at a slower rate.

3.5.4 With regard to Aberdeen City, it should be noted that land at the Aberdeen Energy and Innovation Parks, and land at Findlay Farm at Bridge of Don has not been included in the marketable/immediately available supply. These sites have only been counted as part of the established supply due to the fact that they are zoned for Class 4 use only (see Glossary of Terms).

3.6 Immediately Available Land Supply

3.6.1 The immediately available land supply for 2014 is shown in *Figure 5*.

Figure 5 - Immediately Available Land Supply 2013 and 2014 (net figures in hectares)

Employment Area	2013	2014	Change
Aberdeen City	71	66	-7%
Aberdeenshire	45	40	-11%
TOTAL	**116**	**106**	**-9%**

3.6.2 The supply of immediately available land in Aberdeen City has decreased by 7% to 66ha in 2014, largely due to the net effect of further marketable land on the new business parks in the vicinity of the airport being classed as immediately available and other sites progressing, such as Aberdeen Gateway.

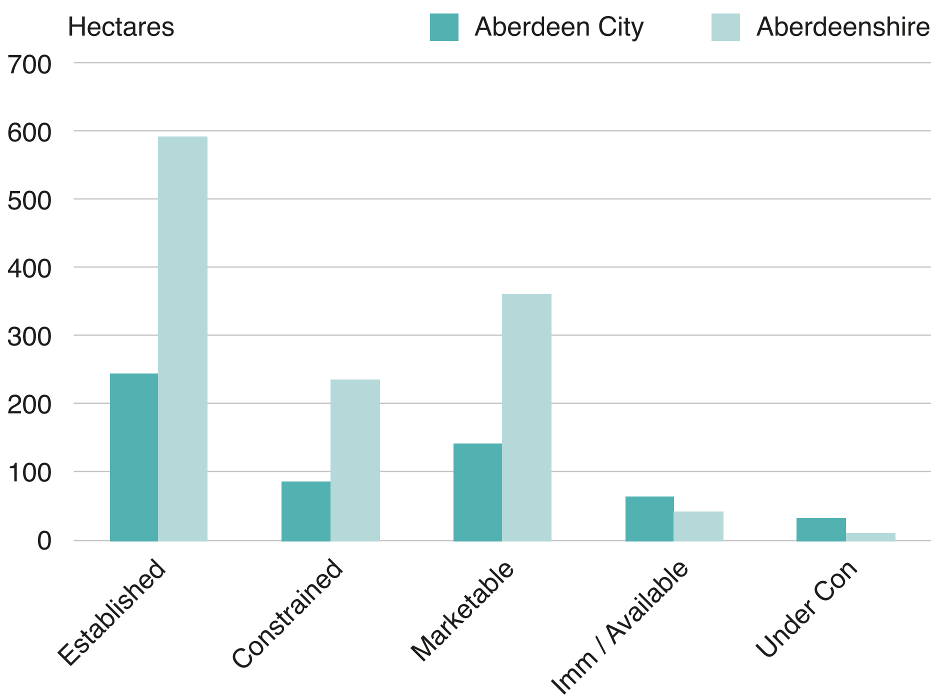
3.6.3 In Aberdeenshire there has also been a net decrease of 11% in the supply of immediately available land to 40ha as various sites are developed.

3.6.4 Overall some 62% of all immediately available land is currently located within Aberdeen City. In recent years there had been a lack of available land within the City which had led to more development taking place on available land in Aberdeenshire. With the addition of new sites from the Aberdeen Local Development Plan, adopted in 2012, Aberdeen City now has a greater proportion of the immediately available land. 27% of the established supply of land in Aberdeen City is immediately available compared with 7% in Aberdeenshire, perhaps reflecting the continued strength of demand in the City and rapid progress on sites during 2013/14.

3.6.5 Land under construction is not included in the above categories, as it is neither available nor considered as developed. On completion it will, however, be reflected in the historical development rates for next year's audit. Land under construction is identified in *Appendices 2 and 3* of the Audit. At the beginning of April 2014 there were 34 hectares of employment land under construction in Aberdeen and 11 hectares of land under construction in Aberdeenshire.

3.6.6 *Figure 6* 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 6 - Employment Land Supply Summary 2014



4. ANALYSIS OF TRENDS

4.1 Land Take-Up and Employment Space Market Activity [2]

4.1.1 In 2013/14, 14ha of employment land was developed in Aberdeenshire, in line with an average development rate of 14ha per year for the past 10 years. A further 11ha are currently under construction. In Aberdeen City, 17ha of land has been completed over the past year and a further 34ha are currently under construction.

4.1.2 2013 was a third consecutive impressive year for all employment space take-up in and around Aberdeen, including both new developments and the second hand market. A number of large new business parks are either under construction or have planning permission, and while healthy employment land take-up could have been expected to continue over the next few years, the impact of the more recent fall in the price of oil is not yet known. In addition, large office developments have frequently come forward on sites not currently identified as employment land in the audit, and there are a number of schemes currently underway in Aberdeen City Centre, for example 'The Grande' office development for at Poynernook Road, part of the new North Dee Business Quarter.

4.1.3 The strength of demand during 2013/14 in Aberdeen and Aberdeenshire towns such as Westhill, Kintore and Portlethen can be attributed to the growth in the international oil and gas industry, the drive to recruit skilled employees in an attractive working environment and the high levels of investment, with many international energy companies having a significant presence in and around Aberdeen and the larger Aberdeenshire towns. International oil and gas firms have been increasingly seeking high-status, Grade A office space in a bid

[2] *Published Sources: Knight Frank Aberdeen Office Market Activity Report Spring 2014; Ryden 74th Scottish Property Review April 2014; Aberdeenshire Economic Development Review 2013/14.*

to attract skilled employees in the face of competition from other cities worldwide. The price of Brent Crude remained over $100 per barrel in the 2013/14 financial year, and the industry had also been encouraged by the UK Treasury's announcement of tax reliefs, including relief against future decommissioning costs. However, continued investment into the exploration and extraction of oil from increasingly difficult or costly North Sea reserves may now occur at a slower rate than previously anticipated given the recent significant fall in the price of Brent Crude to around $60 per barrel in December 2014.

4.1.4 Technologies developed by companies and skilled employees based in Aberdeen City & Shire, have been increasingly in demand and exported all over the world. One of the main drivers of new office and industrial development has been the growth in international oil and gas sales and the competition between companies to attract and retain skilled staff both locally and internationally. However, in a document entitled 'The Future', which discusses how Aberdeen City and Shire will continue to be a world class centre of excellence for the global energy industry, ACSEF stress that companies are increasingly able to be located in any global energy city. Ensuring they choose Aberdeen will mean investing in and improving our transport infrastructure, housing, business space and social, cultural and leisure services.

4.1.5 In Aberdeenshire, demand remained high during 2013/14 in some locations, particularly in towns close to Aberdeen City with good transport links, such as Westhill, Kintore, Ellon and Portlethen. In more peripheral areas there tends to be much less activity despite the large number of allocated employment sites.

4.2 Office Space - Market Activity

4.2.1 2013/14 saw the take-up of over 1,000,000sqft of office space in the Aberdeen City/Westhill area, including development on both greenfield and brownfield sites, as well as the second hand market. This was a significant proportion of the combined take up level for Glasgow, Edinburgh and Aberdeen of just over 3,000,000sqft. It is estimated that the energy sector accounted for almost 80% of all the space transacted. A large proportion of this was in the form of pre-let agreements for new units on the city's business parks, including Prime Four, Kingswells and Prospect Park, Westhill. Reflecting the strength of demand during this period, there had been sufficient confidence for some speculative development to also take place. There is a lack of supply in Aberdeen City Centre, although a number of high-profile schemes have permission and are underway, for example the 'The Point' development at Triple Kirks. In this regard, the popularity of the city centre for companies' headquarters is resurging, which could be due to the fact that city centre offices are more likely to be attractive to a younger workforce. A number of large scale, high quality office schemes are also planned or under construction in the Poynernook Road district, branded the North Dee Business Quarter, to the south of Union Square shopping centre and transport hub. During 2013/14 Aberdeen continued to command the highest prime rents in the UK outside of London and the South East.

4.3 Industrial Space - Market Activity

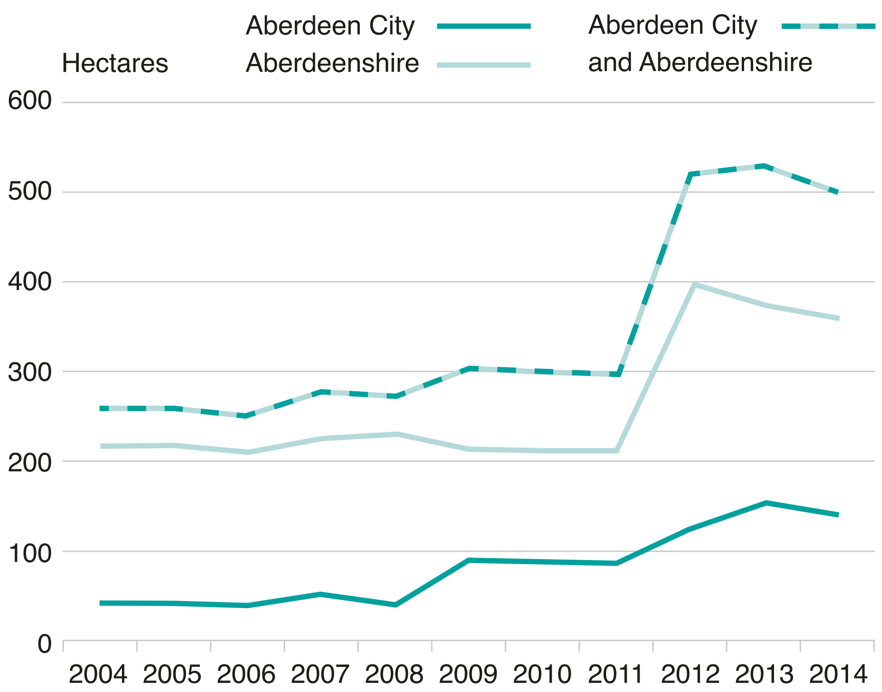
4.3.1 There was also strong demand for industrial space during 2013/14 in both the City and Shire, which saw a take-up of around 1,000,000sqft in the Aberdeen City/Westhill/Portlethen area, again covering new build developments on both greenfield and brownfield sites, as well as the second hand market. This included a small number of very large schemes as well as a large proportion of smaller scale premises. A shortage of supply of suitable premises within the City's existing industrial estates, has encouraged many companies to relocate, sometimes out of the City altogether to Aberdeenshire towns like Kintore and Westhill, in order find larger units in locations that are better suited to light industry or manufacturing activities.

A number of new business and industrial parks are currently nearing completion or under construction in and around Aberdeen. During 2013/14 Aberdeen's prime industrial rents remained the highest in the UK outside of London and the Thames Gateway. This may account for the fact that Aberdeen saw some significant speculative development coming forward in the industrial sector.

4.4 Trends in Employment Land

Figure 7 - Employment Land Development Rates 2003-2013

Figure 8 - Trends in Marketable Employment Land in Aberdeen City and Aberdeenshire 2004-2014



4.4.1 *Figure 7* shows that Aberdeenshire has dominated the take-up of employment land in recent years, although this changed in 2013 with a substantial rise in take up in Aberdeen City where rapid development has taken place on many of the large employment sites allocated in the local development plan. A high level of completions is expected to continue next year as further sites are under construction, and it is hoped that other sites that have secured planning permission will also come forward depending on circumstances in the oil and gas industry.

4.4.2 *Figure 8* shows that both Aberdeenshire and Aberdeen City had a steady amount of marketable land supply up until the adoption of the two local development plans 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 local development plans are developed and subsequently replaced by the progression of other sites into the marketable supply.

4.4.3 Additional information is included in *Appendix 4* showing the provision of employment land according to three separate zones. These have arbitrary boundaries but roughly correspond to distance from Aberdeen City.

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.

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 subject to user restrictions or that is held as 'option land' for existing companies' own expansion cannot be considered to be marketable.

Serviced (Ser)

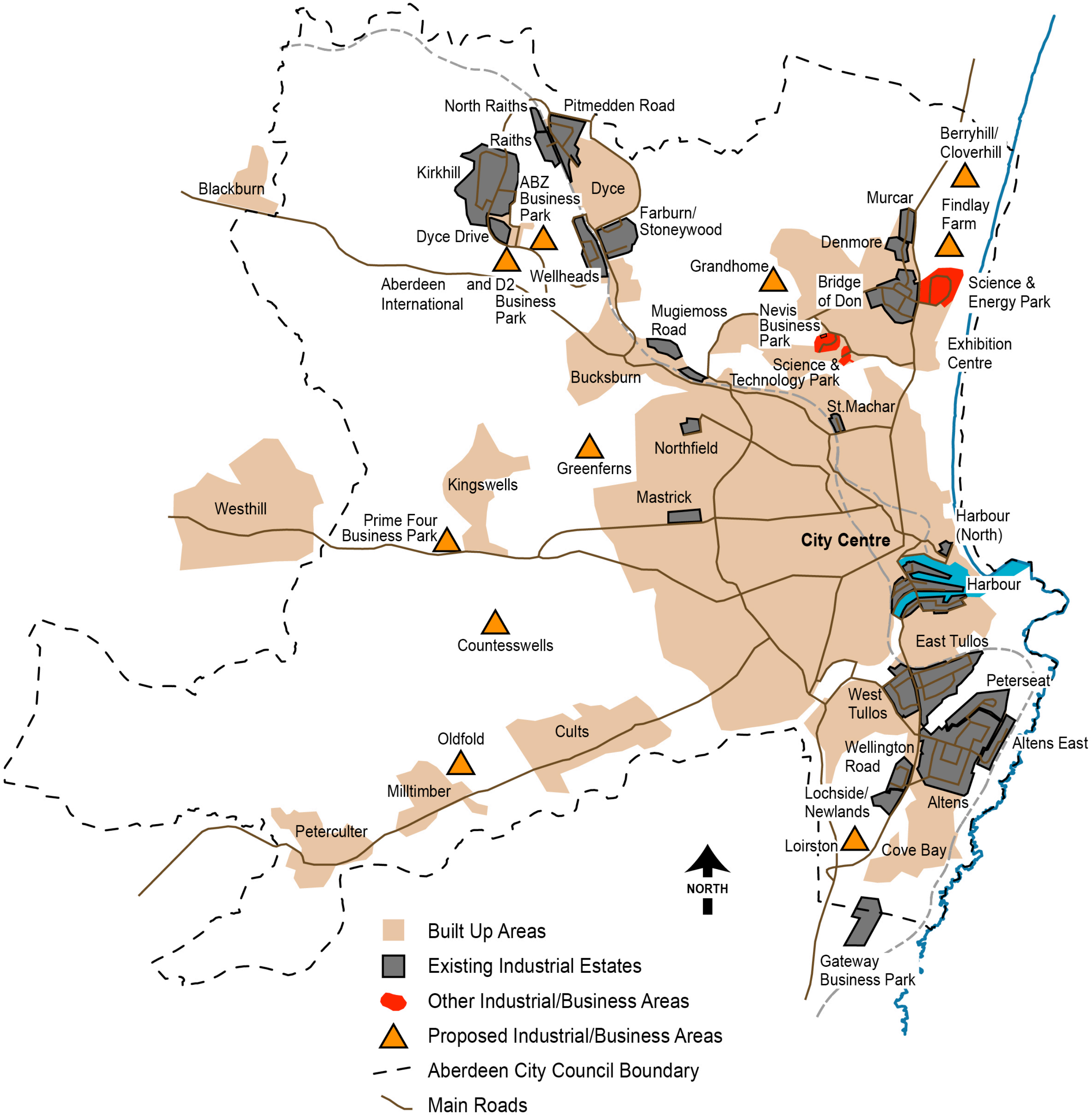
The area of undeveloped land for which servicing has been provided either on the site itself or the wider site.

Under Construction (UC)

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

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

LOCATION	DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Altens (38a Hareness Road)	Private	None	Yes	0	0	0	0	0.9
Lochside/Newlands (Balmoral Business Pk)	Balmoral Group	None	Yes	3.6	0	3.6	3.6	0
Aberdeen Gateway	Halladale Muir		Yes	3.5	0	3.5	3.5	0
Peterseat	Forbes Development Ltd	None	Yes	6.9	0	6.9	6.9	0
Altens East & Doonies	Esson Properties	Part Planning Constraint	Part	8.8	2.3	6.5	6.5	0
Aberdeen Science & Energy Park	Scottish Enterprise Grampian	Class 4 Only	Yes	1.2	0	0	0	0
Aberdeen Innovation Park	Scottish Enterprise Grampian	Class 4 Only	Yes	2.4	0	0	0	0
Findlay Farm	Scottish Enterprise Grampian	Class 4 Only	No	13.1	0	0	0	0
The Core Berryhill/Cloverhill	Private		No	54.7	0	54.7	0	0
Airport Dyce Drive	Miller, Ribnort, Kilmartin, BAA	Ownership & Infrastructure	Part	59.3	24.1	35.2	28.3	25.8
Dyce Drive, 9 Dyce Avenue	Morley		Yes	0.9	0	0.9	0.9	0
Raiths, Dyce (Kirkton Drive)	Private		Yes	1.2	0	1.2	1.2	0
Wellheads West	Private	Noise & Height Restrictions	Yes	1.4	0	1.4	1.4	0
OP12 Grandhome	Grandhome Trust		No	4	4	0	0	0
OP26 Craibstone North & Walton Farm	Private		No	1.2	1.2	0	0	0
OP28 Rowett North	Private		No	27.6	27.6	0	0	0
Prime Four	Drum		Part	26.4	0	26.4	13.2	6.8
OP45 Greenferns	ACC		No	8	8	0	0	0
OP46 East Arnhall	Private		No	0.64	0.64	0	0	0
OP58 Countesswells	Countesswells Consortium		No	8	8	0	0	0
O62 Oldfold	CALA		No	4	4	0	0	0
OP77 Loirston	Private		No	8.8	8.8	0	0	0
			Total	**245.64**	**88.64**	**140.3**	**65.5**	**33.5**



Aberdeen City Industrial and Business Areas 2013-14

From Aberdeen City Council Industrial Areas Guide 2013-2014

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

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
BANFF AND BUCHAN											
Aberchirder	B/AB/E/001	Cornhill Road	BUS1	Aberdeenshire Council		Part	1	0	1	0	0
Cairnbulg/Inverallochy	B/CI/E/001	Cairnbulg Harbour	E1	Private	Other	Yes	0.51	0.51	0	0	0
Fraserburgh	B/FR/E/002	West Shore	BUS1	Aberdeenshire Council		Yes	0.27	0	0.27	0.27	0
Fraserburgh	B/FR/E/003a	Fairney Hill Business Park Ph 2		Aberdeenshire Council		No	1.88	0	1.88	0	0
Fraserburgh	B/FR/E/003b	Chapelhill Rosehearty/ Watermill	BUS2	Private	Infrastructure	Part	10.9	10.13	0.77	0.77	0
Fraserburgh	B/FR/E/007	Fairney Business Park	BUS1	Aberdeenshire Council		Yes	1.18	0	1.18	1.18	0.89
Fraserburgh	B/FR/E/008	Phingask	E1	Private	Physical, Marketability	No	16.5	16.5	0	0	0
Fraserburgh	B/FR/E/009	Kirkton Development	M1	Private	Infrastructure	No	4	4	0	0	0
Inverboyndie	B/IB/E/002	Inverboyndie- Phase 1	BUS1	Private		Yes	1.4	0	1.4	1.4	0
Inverboyndie	B/IB/E/003	Inverboyndie- Phase 2	BUS1	Private		No	1.4	0	1.4	0	0
Macduff	B/MC/E/003	Tarlair Business Park	BUS2	Aberdeenshire Council		Yes	4.9	0	4.9	4.9	0
Macduff	B/MC/E/004	Buchan Road- West	BUS2	Private	Ownership	No	4.01	4.01	0	0	0
Macduff	B/MC/E/005	Green Hills	E1	Private		No	12	0	12	0	0
Rosehearty	B/RH/E/001	South of Ritchie Road	M1	Private	Infrastructure	No	2	2	0	0	0
					BANFF AND BUCHAN TOTAL		**61.95**	**37.15**	**24.8**	**8.52**	**0.89**
BUCHAN											
Ardallie	U/AD/E/001	Ardallie ALDP M1 (Land at Nether Backhill)	M1	Private		No	0.3	0	0.3	0	0
Auchnagatt	U/AG/E/001	Auchnagatt ALDP M1 (Adj A948)	M1	Private		No	0.5	0	0.5	0	0
Crimond	U/CM/E/001	Crimond ALDP E1	E1	Private		No	6	0	6	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Cruden Bay	U/CR/E/001	Cruden Bay ALDP M1 (Land West of Golf Road)	M1	Private	Other	No	2	2	0	0	0
Hatton	U/HT/E/001	Hatton ALDP E1	E1	A Wyness & Sons		No	0.8	0	0.8	0	0
Longside	U/LG/E/001	Longside - Inverquhomery Road	BUS1	Private		No	1.2	0	1.2	0	0
Longside	U/LG/E/002	Longside ALDP M1	M1	Chap Homes		No	1.7	0	1.7	0	0
Mintlaw	U/ML/E/003	Mintlaw - Aden Business Park	BUS1	Aberdeenshire Council		No	0.91	0	0.91	0	0
Mintlaw	U/ML/E/005	Mintlaw ALDP M1 (Nether Aden)	M1	Bancon Homes	Other	No	5	5	0	0	0
Peterhead	U/PH/E/002	Peterhead - Balmoor	BUS2	Aberdeenshire Council		Yes	2.07	0	2.07	0.69	0
Peterhead	U/PH/E/003	Peterhead - Dales Industrial Estate West	BUS3/BUS4	Aberdeenshire Council		Part	10.17	2.4	7.77	3.48	0
Peterhead	U/PH/E/004a	Peterhead - Dales Industrial Estate East	BUS4	Private		Part	1.71	0	1.71	1.71	0.8
Peterhead	U/PH/E/005a	Peterhead - Damhead/ Upperton Industrial Estate North	BUS4/BUS6	Private		Part	4.16	0	4.16	0.25	0
Peterhead	U/PH/E/006	Peterhead - Energetica Industry Park (Upperton Ind Est)	BUS6/BUS7	Scottish Enterprise		No	16.6	0	16.6	0	0
Peterhead	U/PH/E/007	Peterhead - Wellbank	BUS5	Score Group Ltd		Part	26.94	0	26.94	0	0
Peterhead	U/PH/E/008	Peterhead - Invernettie Roundabout/South Road		Private		Part	0.66	0	0.66	0.66	0
Peterhead	U/PH/E/009	Peterhead ALDP M1 (Waterside)	M1	Private	Other	No	4	4	0	0	0
Peterhead	U/PH/E/010	Peterhead ALDP E1 (Wellbank)	E1	Score Group Ltd		No	14	0	14	0	0
						BUCHAN TOTAL	**98.72**	**13.4**	**85.32**	**6.79**	**0.8**

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	0	5	0	0
Blackdog	F/BD/E/001	Blackdog	M1	Private	Infrastructure, Other	No	4	4	0	0	0
Cuminestown	F/CT/E/001	Cuminestown Industrial Estate	BUS1	Aberdeenshire Council	Marketability, Other	No	0.54	0.54	0	0	0
Ellon	F/EL/E/005	Balmacassie South	BUS1			Yes	5.38	0	5.38	5.38	0
Ellon	F/EL/E/006	Cassiegills	E1	Private		No	9	0	9	0	0
Ellon	F/EL/E/007	Cromleybank	M1	Scotia Homes	Other	No	2	2	0	0	0
Foveran	F/FV/E/001	South of Westfield	M1	Harper & Cochrane Ltd		No	2	0	2	0	0
Foveran	F/FV/E/002	Roadside Croft	E1	Private		No	1.5	0	1.5	0	0
Newburgh	F/NB/E/002	Loanhead Phase 2	BUS1	Private		No	1.96	0	1.96	0	0
Newburgh	F/NB/E/007	East of Parkview	M1	Private		No	1.5	0	1.5	0	0
Oldmeldrum	F/OM/E/003b	Oldmeldrum Business Park/ Meadows Industrial Estate	BUS1	Private		Part	1.94	0	1.94	0.74	1.6
Oldmeldrum	F/OM/E/005	North of Meldrum Academy	M2	Private	Other	No	2.1	2.1	0	0	0
Pimedden	F/PM/E/001	Milldale East	BUS2	Private	Ownership, Infrastructure	No	1.58	1.58	0	0	0
Rothienorman	F/RO/E/002	Rothienorman West of B9001	BUS1	Private	Marketability	No	1.22	1.22	0	0	0
Rashiereive	F/RR/E/001	West of Rashiereive Cottages	E1	Private		No	2	0	2	0	0
Turriff	F/TF/E/001	Markethill North	BUS1	Aberdeenshire Council		Yes	0.58	0	0.58	0.58	0
Turriff	F/TF/E/004	East of Markethill Industrial Estate	BUS1	Private		No	2.02	0	2.02	0	0
Turriff	F/TF/E/005	South of Markethill Road	BUS1		Ownership	Yes	0.67	0.67	0	0	0
Turriff	F/TF/E/007	Markethill Crofts North	E1	Private		No	1	0	1	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Turriff	F/TF/E/008	Markethill Crofts East	E2	Private		No	1.7	0	1.7	0	0
Turriff	F/TF/E/009	Broomhill Road	E3	Private		No	4.5	0	4.5	0	0
Turriff	F/TF/E/010	Balmellie Crofts	M1	Private	Other	No	10	10	0	0	0
Tarves	F/TV/E/003	Braiklay Cottages	M1	Private	Other	No	3	3	0	0	0
Udny Station	F/US/E/001	East of Woodlea Grove	M1	Private	Ownership	No	1	0	1	0	0
Westfield	F/WF/E/001	Westfield Foveran	E1	Private		No	2	0	2	0	0
						FORMARTINE TOTAL	**68.19**	**25.11**	**43.08**	**6.7**	**1.6**
GARIOCH											
Blackburn	G/BB/E/004	Blackburn - Kinellar Business Park	BUS	Private		Part	1.25	0	1.25	1.25	0
Insch	G/IS/E/005	Insch - Muiryheadless	BUS	Aberdeenshire Council		Yes	2.36	0	2.36	2.36	0
Insch	G/IS/E/006	Insch - South of Muiryheadless	BUS	Private	Ownership	No	2.2	2.2	0	0	0
Insch	G/IS/E/007	Insch ALDP E1	E1	Private		No	5	0	5	0	0
Inverurie	G/IV/E/008	Inverurie - Fairholme/ Highclere	BUS3	Private		Yes	0.6	0	0.6	0.6	0
Inverurie	G/IV/E/012	Inverurie ALDP M2 (Harlaw Road)	M2	Private/Aberdeenshire Council		Yes	0.5	0	0.5	0	0
Inverurie	G/IV/E/013	Inverurie ALDP E1	E1	Crichie Dev Ltd/ Dandara		No	15.5	0	15.5	0	0
Inverurie	G/IV/E/014	Inverurie ALDP E2	E2	ANM Group Ltd		No	1.5	0	1.5	0	0
Inverurie	G/IV/E/015	Inverurie ALDP E3	E3	ANM Group Ltd		No	10	0	10	0	0
Inverurie	G/IV/E/016	Inverurie - Port Elphinstone Central	BUS7	Kilbride Resources Ltd		No	2.5	0	2.5	0	0
Inverurie	G/IV/E/017	Inverurie - Crichiebank Business Centre	BUS5	Private		Part	1.05	0	1.05	0	0
Kemnay	G/KM/E/002	Kemnay - Dalmadilly	BUS1	Private	Ownership	No	4.3	4.3	0	0	0
Kemnay	G/KM/E/004	Kemnay East	BUS2	Private		Part	2.8	0	2.8	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Kingseat	G/KS/E/001x	Kingseat	BUS1	Manor Kingdom		Part	1	0	1	0	0
Kintore	G/KT/E/002	Kintore - Midmill North	BUS3	Private		Yes	1.2	0	1.2	1.2	0.6
Kintore	G/KT/E/002a	Kintore - Midmill South	BUS4/M1	Malcolm Allan		Yes	0.95	0	0.95	0.95	0.58
Kintore	G/KT/E/002b	Kintore North/Bridgend	BUS2	Private	Physical	No	5	2.5	2.5	0	0
Kintore	G/KT/E/003b	Kintore Business Park	BUS1	Private		Yes	0.6	0	0.6	0	0
Kintore	G/KT/E/004	Kintore ALDP M1	M1	Kintore Consortium		No	5	0	5	0	0
Millbank	G/MB/E/003	Millbank Mixed Use Site M1	M1	Cluny Estates	Infrastructure	No	1.3	1.3	0	0	0
Newmachar	G/NM/E/003	Newmachar ALDP E1	E1	Kirkwood Homes		No	5	0	5	0	0
Westhill	G/WH/E/007	Westhill - Arnhall Business Park Ph2	BUS	Private		Yes	1.6	0	1.6	1.6	0.88
Westhill	G/WH/E/008	Westhill ALDP E1	E1	Westhill Dev Co Ltd		Part	7.84	0	7.84	0	1.76
						GARIOCH TOTAL	**79.05**	**10.3**	**68.75**	**7.96**	**3.82**
KINCARDINE AND MEARNS											
Auchenblae	K/AU/E/001	Auchenblae ALDP M1 (Hillview)	M1	Kincardineshire Investment Co	Other	No	1	1	0	0	0
Drumlithie	K/DL/E/001	Drumlithie ALDP M1 (Land Adj Bowling Green)	M1	Peterkin Homes Ltd		No	0.5	0	0.5	0	0
Chapleton of Elsick	K/EL/E/001	Chapleton of Elsick - New Settlement ALDP M1	M1	Elsick Dev Co Ltd		No	11.5	0	11.5	0	0
Edzell Woods	K/EW/E/001	Edzell Woods ALDP M1 (Former Edzell Airfield)	M1	Carnegie Base Services	Marketability, Infrastructure	No	100	100	0	0	0
Gourdon	K/GD/E/001	Gourdon Business Park	BUS	Aberdeenshire Council		Yes	1.48	0	1.48	1.48	0
Gourdon	K/GD/E/002	Gourdon ALDP E1	E1	Private		No	3	0	3	0	0
Laurencekirk	K/LK/E/004	Laurencekirk - Mart Site West		Aberdeenshire Council		Yes	0.26	0	0.26	0.26	0
Laurencekirk	K/LK/E/005	Laurencekirk ALDP M1 (Conveth Mains)	M1	Kirkwood Homes		No	11	0	11	0	0

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Luthermuir	K/LM/E/001	Luthermuir ALDP M1	M1	Private	Other	No	0.25	0.25	0	0	0
Luthermuir	K/LM/E/002	Luthermuir ALDP M2	M2	Private	Other	No	0.25	0.25	0	0	0
Marykirk	K/MK/E/001	Marykirk ALDP M1 (West Park)	M1	Private		No	0.5	0	0.5	0	0
Newtonhill	K/NH/E/001	Newtonhill - West Monduff Farm	BUS	A&D Developments (Scotland) Ltd		No	7.2	0	7.2	0	0
Newtonhill	K/NH/E/002	Newtonhill ALDP E1	E1	Elsick Dev Co Ltd		No	11.5	0	11.5	0	0
Portlethen	K/PL/E/004	Portlethen - Badentoy Industrial Park	BUS1	Badentoy Developments Ltd		Yes	11.46	0	11.46	0.4	3.42
Portlethen	K/PL/E/005	Portlethen - City South Business Park	BUS2	Dandara		No	13	0	13	0	0
Portlethen	K/PL/E/006	Portlethen - Mains Of Cairnrobin	BUS	Private		No	37	0	37	0	0
Portlethen	K/PL/E/007	Portlethen - Moss Side	BUS	Private		Part	3.09	0	3.09	0.62	0
Portlethen	K/PL/E/008	Portlethen ALDP E1	E1	Private		No	6.5	0	6.5	0	0
Portlethen	K/PL/E/009	Porthlethen ALDP E2	E2	Private		No	15.5	0	15.5	0	0
St Cyrus	K/SC/E/001	St Cyrus/Lochside ALDP M1 (Adjacent A92)	M1	Private	Other	No	2	2	0	0	0
Stonehaven	K/ST/E/003	Stonehaven - East Newtonleys	BUS2	Bancon Developments		No	11.31	0	11.31	0	0
Stonehaven	K/ST/E/004	Stonehaven ALDP E2	E2	Bancon Developments		No	7	0	7	0	0
Stonehaven	K/ST/E/005	Stonehaven ALDP E1	E1	Private		No	1	0	1	0	0
						KINCARDINE AND MEARNS TOTAL	**256.3**	**103.5**	**152.8**	**2.76**	**3.42**
MARR											
Aboyne	M/AB/E/004	Aboyne West	M1	Private	Other	No	1	1	0	0	0
Alford	M/AF/E/002b	Alford Business Park	M2	Kirkwood Homes		No	0.72	0	0.72	0	0
Alford	M/AF/E/003	Academy Site	M1	Aberdeenshire Council	Ownership	Yes	1.2	1.2	0	0	0
Banchory	M/BN/E/002	Hill of Banchory	BUS1	Bancon Developments		Yes	5.89	0	5.89	5.89	0.1

SETTLEMENT	SITE Ref	LOCATION	ALDP Code	MAIN DEVELOPER	CONSTRAINTS	SER	ESTAB	CONST	MARKET	IMM/AVAIL	UC
Banchory	M/BN/E/003	Burn O'Bennie	BUS2	Bancon Developments		No	2.21	0	2.21	0	0
Banchory	M/BN/E/004	Lochton of Leys	M2	Private	Other	No	2	2	0	0	0
Huntly	M/HT/E/002	Depot Road	BUS2	RB Farquhar		Yes	0.88	0	0.88	0.88	0
Huntly	M/HT/E/004a	Muckle Torry Hillock North	BUS1	Private		No	1.75	0	1.75	0	0
Huntly	M/HT/E/005	Mart	BUS3	Private		No	3.28	0	3.28	0	0
Huntly	M/HT/E/006	Adj Linnorie	E1	Private		No	4.5	0	4.5	0	0
Kennethmont	M/KM/E/001	Opposite School	E1	Private		No	0.6	0	0.6	0	0
Kincardine O'Neil	M/KN/E/001	Dee Street	M1	Private	Other	No	0.8	0.8	0	0	0
Kincardine O'Neil	M/KN/E/002	Willowbank	E1		Ownership	No	0.8	0.8	0	0	0
Lumsden	M/LD/E/002	Lumsden	BUS	Private		No	0.3	0	0.3	0	0
Muir of Fowlis	M/MF/E/001	Muir of Fowlis	BUS	Private		No	0.3	0	0.3	0	0
Rhynie	M/RN/E/001	Rhynie Richmond Avenue East	BUS	Aberdeenshire Council		Yes	0.18	0	0.18	0.18	0
Rhynie	M/RN/E/002	Rhynie Richmond Avenue West	M1	Private	Other	No	0.6	0.6	0	0	0
Tarland	M/TL/E/002	Burnside Road	M1	Private	Other	No	1	1	0	0	0
Torphins	M/TP/E/001	South of A980	BUS	Private		No	1.22	0	1.22	0	0
						MARR TOTAL	**29.23**	**7.4**	**21.83**	**6.95**	**0.1**
						REPORT TOTAL	**593.44**	**233.86**	**359.58**	**39.68**	**10.63**

APPENDIX 4: Aberdeen City and Shire Zones 1, 2 and 3 (all figures in hectares)

SETTLEMENT	ESTAB	CONST	MARKET	IMM/AVAIL	UC
ZONE 1					
Aberdeen City	245.64	88.64	140.3	65.5	33.5
Blackburn	1.25	0	1.25	1.25	0
Portlethen	86.55	37	49.55	1.02	3.42
Westhill	9.44	0	9.44	1.6	2.64
Zone 1 Total	**342.88**	**125.64**	**200.54**	**69.37**	**39.56**
ZONE 2					
Balmedie	5	0	5	0	0
Banchory	10.1	2	8.1	5.89	0.1
Chapleton of Elsick	11.5	0	11.5	0	0
Ellon	16.38	2	14.38	5.38	0
Inverurie	31.65	0	31.65	0.6	0
Kintore	12.75	2.5	10.25	2.15	1.18
Newburgh	3.46	0	3.46	0	0
Newmachar	5	0	5	0	0
Newtonhill	18.7	0	18.7	0	0
Olmeldrum	4.04	2.1	1.94	0.74	1.6
Stonehaven	19.31	0	19.31	0	0
Other Settlements	23.18	12.88	10.3	0	0
Zone 2 Total	**161.07**	**21.48**	**139.59**	**14.76**	**2.88**

SETTLEMENT	ESTAB	CONST	MARKET	IMM/AVAIL	UC
ZONE 3					
Aboyne	1	1	0	0	0
Alford	1.92	1.2	0.72	0	0
Cruden Bay	2	2	0	0	0
Cumineston	0.54	0.54	0	0	0
Fraserburgh	34.73	30.63	4.1	2.22	0.89
Gourdon	4.48	0	4.48	1.48	0
Huntly	10.41	0	10.41	0.88	0
Insch	9.56	2.2	7.36	2.36	0
Laurencekirk	11.26	0	11.26	0.26	0
Longside	2.9	0	2.9	0	0
Macduff	20.91	4.01	16.9	4.9	0
Mintlaw	5.91	5	0.91	0	0
Peterhead	80.31	6.4	73.91	6.79	0.8
Rothienorman	1.22	1.22	0	0	0
Turriff	20.47	10.67	9.8	0.58	0
Other Settlements	127.51	110.51	17	1.58	0
Zone 3 Total	**335.13**	**175.38**	**159.75**	**21.05**	**1.69**
Grand Total	**839.08**	**322.5**	**499.88**	**105.18**	**44.13**

APPENDIX 5: Strategic Growth Areas and Regeneration Priority Areas in Aberdeenshire (all figures in hectares)

SETTLEMENT	ESTAB	CONST	MARKET	IMM/AVAIL	UC
STRATEGIC GROWTH AREAS					
Ellon-Blackdog	32.88	6	26.88	5.38	0
Peterhead-Hatton	81.11	6.4	74.71	6.79	0.8
Total	**113.99**	**12.4**	**101.59**	**12.17**	**0.8**
Huntly-Pitcaple	9.56	2.2	7.36	2.36	0
Inverurie-Blackburn	45.65	2.5	43.15	4	1.18
Portlethen-Stonehaven	136.06	37	99.06	1.02	3.42
Sth of Drumlithie-Laurencekirk	11.26	0	11.26	0.26	0
Total	**202.53**	**41.7**	**160.83**	**7.64**	**4.6**
Aberdeen HMA Local Growth	36.92	12.28	24.64	2.34	4.24
Rural HMA Local Growth	240	167.48	72.52	17.53	0.99
Total	**276.92**	**179.76**	**97.16**	**19.87**	**5.23**
Report Total	**593.44**	**233.86**	**359.58**	**39.68**	**10.63**

REGENERATION PRIORITY AREAS					
Regeneration Priority Area	153.74	45.55	108.19	16.79	1.69
Outwith Regeneration Priority Area	439.7	188.31	251.39	22.89	8.94
Report Total	**593.44**	**233.86**	**359.58**	**39.68**	**10.63**

Strategic Growth and Regeneration Priority Areas in Aberdeenshire

APPENDIX 6a: Development Rates in Aberdeen City (all figures in hectares)

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

SITE LOCATION	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
1 Altens	-	-	-	0.6	-	-	-	-	-	-	3.0	-	-	-	-	-
2 Altens East	-	-	-	-	-	-	2.6	-	-	0.6	2.4	2.3	-	0.8	-	-
3 East Tullos/Redmoss	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
4 Lochside/Newlands	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1.86
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	-	-	7.75
Sub Total	**-**	**0.6**	**-**	**1.8**	**2.0**	**1.3**	**2.6**	**0.7**	**-**	**3.0**	**7.8**	**4.2**	**1.9**	**0.8**	**-**	**9.61**
9 Links Road	0.6	0.3	-	-	0.9	-	-	-	-	-	-	-	-	-	-	-
10 Mastrick	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
11 Northfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
12 St Machar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Kingswells (Prime Four)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	6.8
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	**1.8**	**-**	**-**	**0.4**	**-**	**0.4**	**-**	**-**	**0.2**	**-**	**1.4**	**3.1**	**-**	**0.7**	**-**	**6.8**

SITE LOCATION	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
18 Dyce Drive (Morley)	-	-	-	1.8	-	-	2.0	-	-	-	3.8	-	-	-	-	-
19 Airport South West (Dyce Drive)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.8	0.56
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**	**0.56**
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**	**16.97**

APPENDIX 6b: Development Rates in Aberdeenshire (all figures in hectares)

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

SITE LOCATION	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Alford	0	0.14	0	0	0	0	0	0	0	0	0	0
Balmedie	0	0	0	0	0.54	0	0	0	0	1.22	0	0
Banchory	0	0	0	0	0	0	0	0.63	3.26	0.93	0	0
Blackburn	0	0.28	0	0	0	0	0	0	0	0	0.76	2.13
Boyndie	0	0	0	0	0	0	0	0.78	0	1.94	3.29	0
Ellon	0	0	0.32	0.43	0	5.63	0	0	1.79	1.38	1.86	2.18
Fraserburgh	0	0	1.43	0	0	0	0	0	0	0	0	2.96
Gourdon	0	0	0.14	0	0	0	0.44	0	0	0	0	0
Huntly	0	0	0	0	5.5	0	0	0	0	0	0.61	0
Insch	1.51	0.18	0	0	0	0.66	0	0	0	0.47	0.67	0
Inverurie	0	0	2.15	0	0.3	0	0	0	0	0	0	0
Kintore	2.86	3.22	0.39	0.24	0	1.12	0	2.7	0	7.79	2.06	2.99
Laurencekirk	0	0.63	0.32	0	0.08	0	0	0.4	0	0	0	0
Macduff	0	0	0	0.2	0	0	0	0	0	0.21	0	0
Mintlaw	0	0	0	0	0	0	0	0	0	0	0.31	0
Newburgh	0	0	0	0	0	0.78	0.46	0.15	0	0.24	0	0
Oldmeldrum	0.26	0	1.25	1.46	0.36	0	0	0	0	0.31	2.81	1.9
Peterhead	1.53	1.25	0.71	4.99	0	0.2	0.65	0.1	0	1.44	1.09	0
Port Elphinstone	0	0	0	1.43	0.85	1.33	0	0	0	0	0.9	0
Portlethen	0	0	5.64	0.8	10.6	4.4	1.27	0.7	2.36	0.28	0.28	0.39
Sauchen	0	0	0	0	0	0	0	0	0	0	0	0
Turriff	0	0	0	0.17	0	0	1.53	0	0	0	0	0
Westhill	1.08	0	1.02	0.91	4.1	0.6	14.71	3.12	0.32	2.5	2.71	1.53
Report Total	**7.24**	**5.7**	**13.37**	**10.63**	**22.33**	**14.72**	**19.06**	**8.58**	**7.73**	**18.71**	**17.35**	**14.08**

The Employment Land Audit is available from:

www.acsef.co.uk
www.aberdeencity.gov.uk
www.aberdeenshire.gov.uk

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