



Employment Land Audit 2016/17

Aberdeen City Council
Aberdeenshire Council

Employment Land Audit 2016/17

A joint publication by Aberdeen City Council and Aberdeenshire Council

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December 2017

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 2016/17 Audit has a base date of 1st April 2017. 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 2016 and April 2017 the established land supply increased in the City by 6% bringing the total to 286ha. Over the past year, 3.4ha have been completed in the established supply and currently 12ha is under construction. Aberdeenshire has seen a small net decrease of 1% to 551ha. Over the past year, 14.2ha have been built out and a further 8.5ha are under construction, although of this about 5ha remain under construction for a second year.

Constrained Supply

There has been no change in the constrained supply for Aberdeen City between April 2016 and April 2017, remaining at 64ha for a second year, which equates to 22% of its established supply. In Aberdeenshire, the constrained supply has increased by 17% over the same period to 253ha, meaning that 46% 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 9% between April 2016 and April 2017 to 223ha, of which 52ha are classed as immediately available. In Aberdeenshire, there was a net decrease of 13% in the marketable supply over the year to 298ha, of which 65ha 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, 2016/17



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 \$40 per barrel in early 2016. In the 2016/17 financial year prices have increased slightly and remained steady closer to \$50 per barrel. It is hoped that ongoing price stability at above \$50 per barrel, together with the vast reduction in operating costs achieved over the last two years, will result in a return to viability and a gradual recovery for North Sea oil.

¹ Published Sources: *Knight Frank Aberdeen Office Market Activity Report Spring 2017* ; *Ryden 80th Scottish Property Review April 2017*, *Ryden 81st Scottish Property Review October 2017*

Figure 2: Europe Brent Crude Price January 2010 – September 2017



Source: eia.gov (US Energy Information Administration)

Looking back over 2016/17, there remained a steady take up of employment land in Aberdeenshire, despite the continuation of low oil prices. In contrast, there has been a significant drop in the rate of development in the City over 2016/17. In the past three years, City completions had been in excess of 15ha per annum compared to only 3.4ha in 2016/17. Currently 12ha is under construction on one site at Rowett North for the Aberdeen Exhibition Conference Centre and a hotel. Several of the previously completed sites in the City are yet to be occupied.

Over the period there has continued to be 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. Speculative building over the past year has been very minimal because of the challenging market conditions.

In the City, the new build activity has taken place on allocated business and employment sites at Prime Four, Kingswells and Altens East & Doonies. In addition large, high quality office developments have recently been completed on brownfield sites in the city centre (Liberty House and The Silver Fin office developments), and the Marischal Square development on Broad Street (high quality office, retail and leisure space) is to be completed towards the end of 2017.

Aberdeenshire development has largely comprised of industrial/warehouse units fairly close to the City at Portlethen, Marywell, Westhill, Kintore and Inverurie. Development elsewhere in Aberdeenshire over the past year has been very limited.

Issues for the Future

While Aberdeen City and Shire continues to recognise the importance of the area as a centre of excellence for the global energy industry, it is recognised that the challenge now is to broaden the economy away from dependence on North Sea oil, particularly in view of the current downturn in the oil and gas sector. Significant investment is taking place in a variety of infrastructure, business, cultural and leisure projects with a view to strengthening the overall economy of the North East. The Aberdeen Western Peripheral Route and duelling of the Balmedie to Tipperty section of the A90 is expected to be completed in 2018. This will significantly improve road links from the south to the north and west of Aberdeen City and beyond into Aberdeenshire. There are several significant projects currently underway to enhance the appeal of Aberdeen city centre, such as the Marischal Square development, Broad Street improvements, the Art Gallery Redevelopment and the Music Hall refurbishment. Elsewhere, the Oil and Gas Technology Centre Innovation Hub was opened in Aberdeen in 2017, the new Aberdeen Exhibition and Conference Centre at Bucksburn is due to complete in 2019, and work has recently started on the Aberdeen Harbour Expansion Project which is expected to complete in 2020.

The rate at which land is transformed from the marketable to the immediately available supply, and the subsequent building out of this land, will be determined largely by market forces. Within Aberdeen City and the nearby Aberdeenshire towns, market forces remain closely linked to the fortunes of the oil and gas industry. A prolonged downturn in the oil price will undoubtedly have an adverse effect on the rate of employment land take up. The majority of recent completions or developments under construction were likely to have been committed to prior to the downturn.

It is known that the business rates liability can be one of the obstacles currently affecting both the viability of new build development taking place and the incentive to refurbish existing stock. Following the Barclay Review of non-domestic rates in Scotland, a number of measures were announced by the Scottish Government in September 2017 to boost economic growth through relief from business rates. In particular it has been announced that from 1 April 2018, business rates will not be payable on a new build commercial property until a new business tenant has been secured, and the tenant will benefit from one year without having to pay rates. In particular it removes the risk of vacant rates for speculative new build development for developers and is expected to attract occupiers for new offices or industrial properties. While this may encourage new build development in some parts of Scotland, it is considered unlikely that this measure alone will make a difference in the North East, where other factors such as low rental levels, high ground lease rents and a lack of market confidence are holding back development at present.

Land ownership can also be a significant constraint to the development of employment land, particularly if the land is owned by a developer for whom office and/or industrial space is not a priority compared to housing. The two local authorities have seen delivering employment space within large new developments as a vital part of ensuring mixed and sustainable communities. However, within Aberdeenshire in particular, the employment land element of these mixed use allocations in the LDP has been slow to progress in the short to medium term. Aberdeenshire also faces the issue of limited demand and a subsequent low take up of employment land allocations in rural areas and the north compared to sites within settlements close to Aberdeen.

1. Introduction

1.1 Purpose of Audit

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

2. Background

2.1 Scotland and North East Scotland Economic Strategies and Policies

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

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

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

2.1.3 NPF3 highlights the potential for both Aberdeen and Aberdeenshire to apply their energy sector and offshore strengths to the development of renewable and clean energy technologies. Aberdeen is focusing on strengthening its role as Scotland's northern gateway and broadening its economic base.

2.1.4 In early 2016 the **Aberdeen City Region Deal** was awarded funding by the UK and Scottish Governments of £250 million over the next 10 years to improve infrastructure in the region and attract employment opportunities.² Aberdeen City and Aberdeenshire Councils 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 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.

2.1.5 **Aberdeenshire Council Economic Objectives 2017-2021** sets the key priorities of investment in infrastructure, innovation, inclusive economic growth and internationalisation. The report plans how Aberdeenshire Council will promote an "Open for Business" message and work to support delivery of the Regional Economic Strategy. In addition, a **New Regeneration Strategy for Aberdeenshire** was approved in March 2016 called "From Strategy to Action: Developing Excellence in our North Coast Communities" - this sets out revised proposals for the regeneration of the north coast towns of Fraserburgh, Banff, Macduff and Peterhead.

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

- 2.1.6 The **Energetica** project aims to highlight attractive development propositions 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 **Scottish Planning Policy (SPP)** published in June 2014. The SPP requires Councils to allocate sites that meet the diverse needs of different sectors and sizes of business and to take a flexible approach, allowing changing circumstances to be accommodated and new opportunities to be realised.
- 2.1.8 Planning authorities should ensure that there is a range and choice of marketable sites and locations for businesses allocated in development plans, including opportunities for mixed use development, to meet anticipated requirements and a variety of size and quality requirements. Marketable land should meet business requirements, be serviced or serviceable within 5 years, be accessible by walking, cycling and public transport, and have a secure planning status. The SPP states that business land audits should be undertaken regularly to monitor sites within the existing business land supply and to inform reviews of development plans. This audit provides a useful tool to measure performance against some of the requirements of Scottish Planning Policy and the Strategic Development Plan (see paragraph 2.2.1 below).

2.2 Aberdeen City and Shire Strategic Development Plan

- 2.2.1 The Aberdeen City and Shire Strategic Development Plan was approved by Scottish Ministers in March 2014. The plan, which sets out a strategic framework for the management of land in the North East up to 2035, requires the Aberdeen and Aberdeenshire Local Development Plans to identify land for business and industrial uses throughout the plan periods.
- 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 new Aberdeen Local Development Plan was adopted in January 2017 and aims to maintain a generous supply of employment land to ensure Aberdeen retains its position as a competitive and sustainable business location. In order to meet the diverse needs of different types of businesses, a range of allocations have been identified of varying sizes and locations. This will also ensure the Planning Authority is well equipped to manage future proposals efficiently and effectively during the Plan period.
- 2.3.3 The new Aberdeenshire Local Development Plan was adopted in April 2017. The plan promotes an 'open for business' approach and considers the development of business as being very important to the economic health of the region. It supports the development of business and sustainable economic growth in all areas by taking account of the economic benefits of a proposed development when making decisions in development management.
- 2.3.4 The new and existing employment land sites allocated in the Aberdeen City and Aberdeenshire Local Development Plans 2017 are included in the Employment Land Supply tables that can be found in *Appendices 2 and 3*. In addition, several previously allocated employment sites have now been removed from the 2017 plans and no longer appear in the audit. The audit supports the monitoring requirements of the two Local Development Plans.
- 2.3.5 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 a Development Activity Report, which monitors the development of new Class 4 (business) uses in the City.

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

1. The 2016-2017 Aberdeen Industrial Areas Guide:
http://www.aberdeencity.gov.uk/tourism_visitor_attractions/tourists_visitors/statistics/stt_Home.asp
2. The Aberdeenshire Business and Industrial Areas Guide 2014
<http://www.aberdeenshire.gov.uk/council-and-democracy/statistics/Economy/>
3. The 2016 Scottish Annual Vacant and Derelict Land Survey (published April 2017):
<http://www.gov.scot/Publications/2017/04/3409>
4. The Aberdeen Vacant and Derelict Land Survey 2016 Report
<http://www.aberdeencity.gov.uk/nmsruntime/saveasdialog.asp?IID=75978&SID=18949>
5. Scottish Assessors Grampian Valuation Roll:
<http://www.saa.gov.uk/grampian/gvjbvalroll.html>
6. Aberdeen Development Activity Report
<http://www.aberdeencity.gov.uk/nmsruntime/saveasdialog.asp?IID=74210&SID=18949>

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 2016 and April 2017

Employment Area	2016	2017	Change
Aberdeen City	269	286	6%
Aberdeenshire	558	551	-1%
TOTAL	827	837	1%

3.3.2 In Aberdeen City the level of established land supply has seen a net increase of 6% between April 2016 and April 2017 to 286ha. Over the past year 3.4ha have been completed and 12ha are currently under construction for the new Aberdeen Exhibition and Conference Centre and an associated hotel. The Marischal Square development in the city centre is also yet to be completed. There have been no new identifications of employment land, and no additions have been made to the existing areas.

3.3.3 In Aberdeenshire there has been a small net decrease of 1% in the established land supply between 2016 and 2017 to 551ha. Completions in the past year covered 14.2 hectares and a further 8.5 hectares were under construction as at April 2017, although of this about 5ha remain under construction for a second year. The majority of take up has been on sites close to the City at Westhill, Portlethen, Kintore and Marywell, although limited development has also taken place slightly further afield in Inverurie and Ellon.

3.3.4 Take up of quality land for new build development for the energy industry in Aberdeen has continued in Aberdeenshire through 2016 and early 2017 at a rate close to the 10 year average despite the continuation of low oil prices, concentrated on sites in or around Aberdeen. However, the level of sites currently under construction appears low, suggesting that completions will fall next year. There has been a significant drop in completions in Aberdeen City from 15.3ha in 2015/16 to 3.4ha in 2016/17 due to the present over supply of office developments, many of which have not been fully occupied. There is only one site under construction but this is expected to change over the next few years as certain mixed use sites which include Class 4 uses are expected to come forward.

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 2016 and April 2017

Employment Area	2016	2017	Change
Aberdeen City	64	64	0%
Aberdeenshire	217	253	17%
TOTAL	281	317	13%

- 3.4.2 There has been no change in the constrained land supply for Aberdeen City between April 2016 and April 2017, remaining at 64ha for a second year, which equates to 22% of its established supply. The constrained supply takes into account allocations within the Aberdeen LDP which do not currently have a Development Framework or Masterplan or are unlikely to see significant progression in the near future. The figure also takes into account employment land allocations within larger mixed use land release sites such as Grandhome and Loirston. The employment land within such allocations will likely be delivered at a later stage of the overall development and is therefore designated as constrained within this audit.
- 3.4.3 The amount of constrained land in Aberdeenshire increased by 17% to 253ha, and now makes up 46% of its established supply. A number of LDP sites are regarded as constrained, either because they do not yet have agreed masterplans or because the planned phasing means the employment land element is not expected come forward within five years of the base date of the audit, and so they are not classed as currently marketable. Other sites have significant infrastructure issues to overcome.

3.5 Marketable Land Supply

- 3.5.1 The marketable land supply in 2017 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 2016 and April 2017

Employment Area	2016	2017	Change
Aberdeen City	205	223	9%
Aberdeenshire	341	298	-13%
TOTAL	546	521	-5%

- 3.5.2 The marketable land supply in Aberdeen City has increased from April 2016 to April 2017 by a net amount of 9% to 223ha. This is largely due to sites around Aberdeen Airport which have now entered the marketable supply. In Aberdeenshire there has been a net decrease of 13% in the supply of marketable land, as some sites have been taken up and further information on the phasing of several sites indicates that development of the employment land is unlikely to start in the next 5 years.
- 3.5.3 The supply of marketable land in Aberdeen City and key Aberdeenshire settlements remains generous with a wide choice of sites currently available. Aberdeen City and Aberdeenshire continue to have an adequate choice and supply of marketable land, following both Councils having adopted their new Local Development Plans in 2017, and 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 sites have been allocated specifically for high quality business use/company headquarters at both Inverurie and Chapelton. In addition, other sites in and around Aberdeen have attracted high quality business development, such as City South, Portlethen and the business parks in the vicinity of Aberdeen Airport.
- 3.5.5 Demand for land in Aberdeenshire tends to be in those settlements concentrated around Aberdeen City such as Westhill, Marywell, 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 much slower rate.

3.6 Immediately Available Land Supply

- 3.6.1 The immediately available land supply for 2017 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 2016 and April 2017

Employment Area	2016	2017	Change
Aberdeen City	46	52	13%
Aberdeenshire	70	65	-7%
TOTAL	116	117	0%

- 3.6.2 The supply of immediately available land in Aberdeen City has increased by 13% to 52ha in April 2017 as a result of existing land which has been serviced and is awaiting development at Prime Four Business Park, as per the approved masterplans.
- 3.6.3 In Aberdeenshire there has been a net decrease of 7% in the supply of immediately available land to 65ha as sites have been taken up. Much of the immediately available land is concentrated relatively close to Aberdeen at Westhill, Portlethen, Ellon, Banchory and Oldmeldrum, but there are also a number of sites in other areas of Aberdeenshire, such as Macduff, Peterhead and Fraserburgh.
- 3.6.4 Overall some 44% of all immediately available land is currently located within Aberdeen City and 56% within Aberdeenshire. 18% of the established supply of land in Aberdeen City is immediately available compared with 12% in Aberdeenshire, reflecting the stronger demand in the City. Over two thirds (47ha) of the immediately available land in Aberdeenshire is situated within an 18 mile radius of Aberdeen.

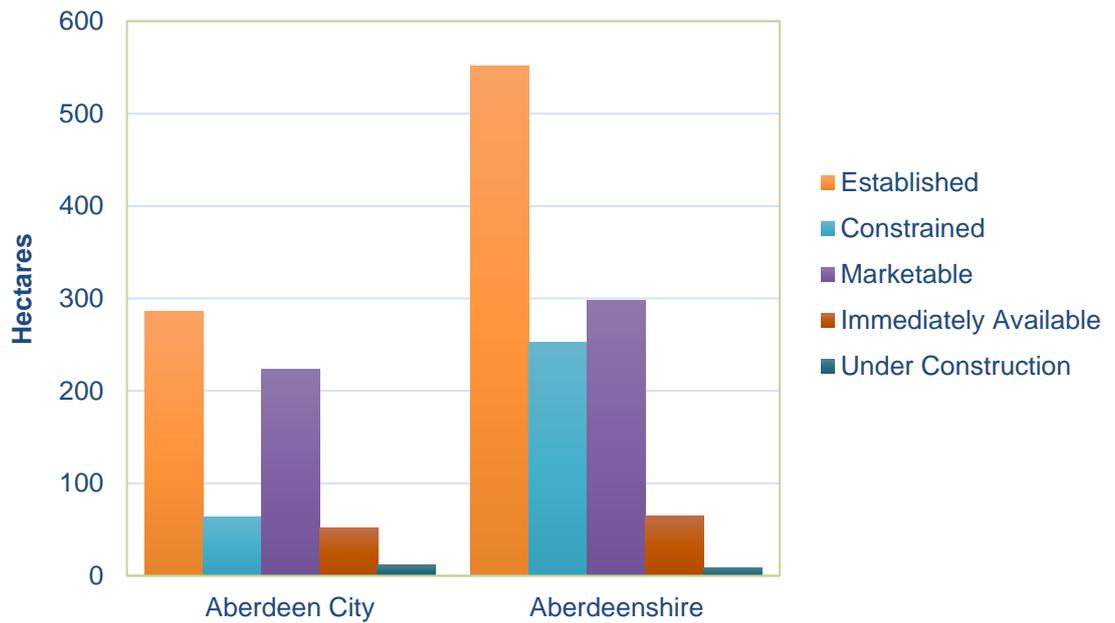
3.7 Under Construction

- 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 2017 there were 12ha of employment land under construction in Aberdeen City and 8.5ha of land under construction in Aberdeenshire, about 5ha of which remains under construction for a second year.

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 2017



4. Analysis of Trends³

4.1 Employment Land Take-Up and Market Activity

- 4.1.1 In 2016/17, 14.2ha of employment land was developed in Aberdeenshire, broadly in line with an average development rate of 14.8ha per year for the previous 10 years. A further 8.5ha are currently under construction (April 2017), although of this about 5ha remain under construction for a second year. In Aberdeen City, 3.4ha of land has been completed over the past year, below an average development rate of around 8ha per annum for the previous 10 years, and significantly below the average over the past 3 years which has been around 15ha per annum. In addition, only one large site is reported to be under construction in the City as at April 2017.
- 4.1.2 Over the period April 2016 to March 2017 the price of Brent Crude fluctuated between \$42 and \$55 per barrel and has remained close to \$50 in more recent months. This is a steadier picture than the previous financial year (2015/16) when there was greater fluctuation between \$30 and \$64. However, there remains a huge contrast with the period from 2011 to late 2014 when price levels were consistently over \$100 per barrel (See Figure 12). Over the past two years the oil and gas industry has sought to vastly reduce operating costs, which has resulted in significant job losses and a reduced demand for accommodation. However, it is hoped that the recent signs of more stability in the industry will lead to a gradual recovery.
- 4.1.3 Despite the continued low oil price, a steady level of employment land take up has continued for new build developments in Aberdeenshire on sites relatively close to the City. Oil and gas industry occupiers will often prefer good quality, purpose built new space, and take advantage of current favourable lease terms and incentives for the tenant.
- 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, Marywell, 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. At Marywell there has been some expansion to the Gateway Business Park in the north and the commencement of the Cairnrobin Business Park close to the A90. Development of the first phase of Midmill Business Park at Kintore is complete, and a large office/workshop premises is close to completion 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, limited new build development has taken place on the LDP employment land sites towards the edges of the city at Altens East /Doonies 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:

³ Published Sources: *Knight Frank Aberdeen Office Market Activity Report Spring 2017* ; *Ryden 80th Scottish Property Review April 2017*; *Ryden 81st Scottish Property Review October 2017*

Figure 8: Brownfield Sites Aberdeen City

Address	Development	Site Size	Status
Liberty House, Palmerston Place (North Dee Business District)	Offices 2,900 sq m	0.12 hectares	Completed 2016/17
Marischal Square, Broad Street	Mixed use including 16,264sq.m offices	0.9 hectares	Under construction
The Silver Fin, 445-461 Union Street	Offices 12,300 sq m	0.23 hectares	Completed 2016/17

4.2 Office Space – Market Activity

4.2.1 Reports from local agents show that the office market in Aberdeen and the North East region continues to be affected by the relationship between oil price and economic activity. The recent stability of the oil price in the region of \$50 per barrel together with the reductions achieved in operating costs has seen a return to viability for the industry and some signs of this improvement are slowly filtering through to the property sector. However, total office supply in Aberdeen has again increased over the past six months and was estimated at just under 269,400 sq.m in April 2017, an increase of 7% - Grade A stock accounts for a high proportion of 41% of this total. The view of local agents is that there will be a considerable time lag before there will be any impact on the supply figure.

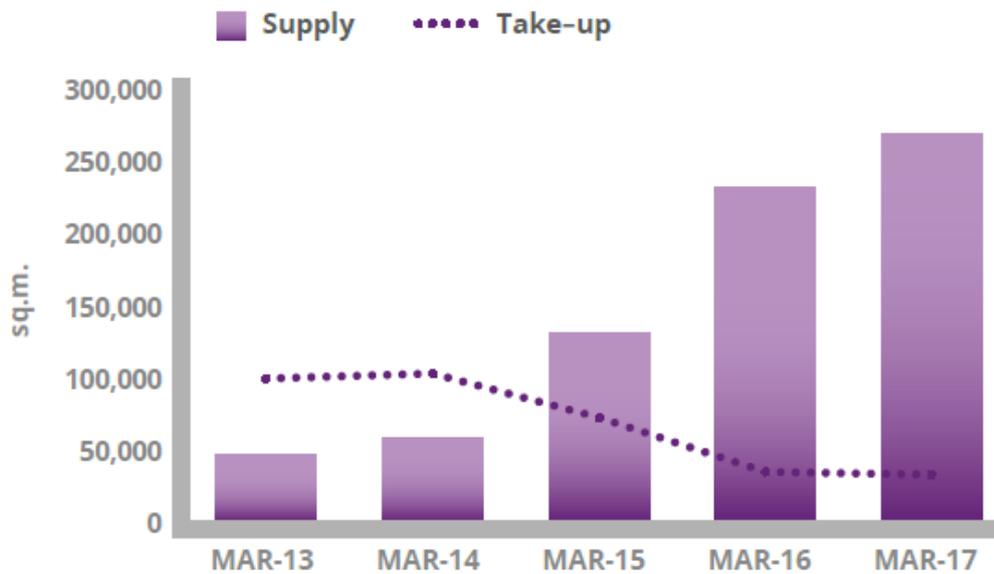
In Aberdeen City, major office development The Silver Fin, has completed this year and the Marischal Square development is due to be completed towards the end of 2017. Prime rents on developments of this type are reported not to have fallen but tenants are being offered very generous lease incentives in order for transactions to complete. A trend has been noted whereby some firms are downsizing from traditional office properties to new, efficient city centre accommodation with the attraction of incentives and flexible leases, further increasing the oversupply in the secondary market.

This continued situation where the supply of office space in and around Aberdeen significantly exceeds demand contrasts with the situation before the fall in oil prices in 2014, when there was soaring demand from occupiers and a lack of stock. The oversupply of Grade A office space in particular can also be attributed to new developments committed to prior to the downturn in the oil and gas industry being delivered into a much weaker occupier market. However, the construction of new accommodation is still seen as important to Aberdeen maintaining its leading position as an energy hub in the future.

Figure 9 below shows both the increase in supply of office space and the fall in take up over the past three 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 for office use in and around Aberdeen.

Figure 9: Aberdeen Office Supply and Take Up



Source: Ryden, 80th Property Review, pg9, April 2017

4.3 Industrial Space – Market Activity

- 4.3.1 Local agents reports indicate that the industrial market in and around Aberdeen continues to experience difficult and challenging times, despite the improved oil price. However, the market outlook for industrial space is considered slightly more positive than that of office space at present. Supply has significantly increased by 95% over the past year, from 85,560 sq.m in April 2016 to 167,282 sq.m in April 2017 (Ryden) and still far outstrips demand. Rental levels have remained stable for new build and good quality stock, but have reduced for second hand stock with occupiers seeking a better deal and landlords wishing to avoid becoming liable for vacant business rates.

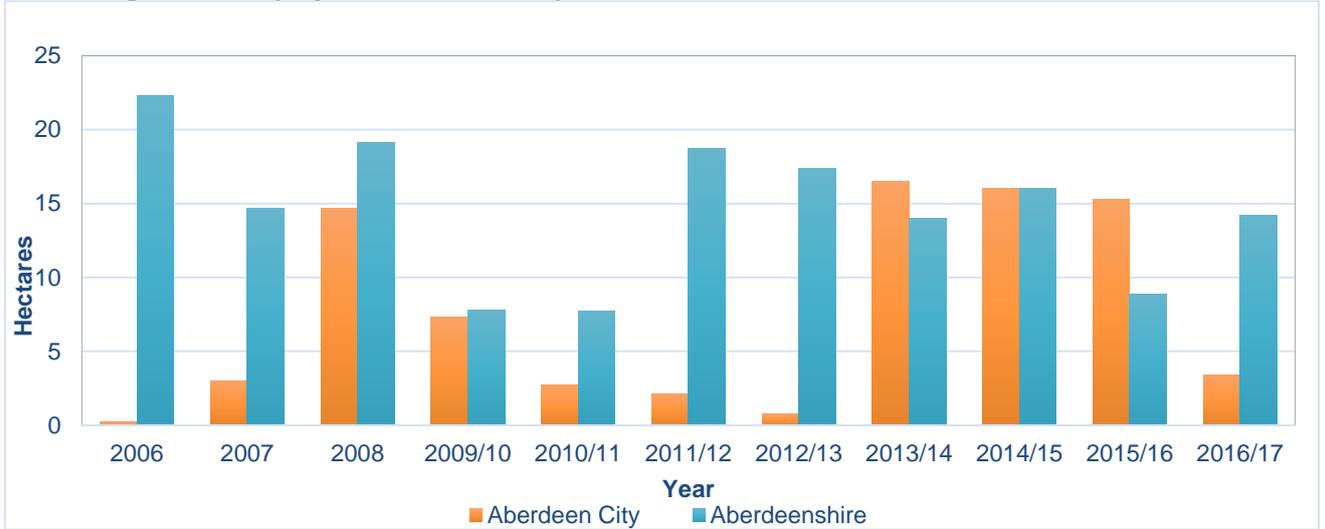
Some developers have continued with limited speculative industrial development projects in Aberdeen and the near vicinity and a number of occupiers have moved to these new build properties because they provide good quality industrial accommodation that better suit their requirements. For example, some recently built units at Gateway Business Park, Aberdeen and Kingshill Commercial Park, Westhill have been successfully let and the developers here have proceeded with some further speculative build in 2016/17. However, this is not expected to continue until those presently available have been taken up, and greater market confidence returns.

4.4 Trends in Employment Land

- 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 next 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. Most recently, take up of employment land can be seen to have dropped back significantly in the City during 2016/17 and it is likely to fall further as there is only one site reported as currently under construction. However, this is expected to change over the next few years as mixed sites with employment uses come forward. Overall, take up in Aberdeenshire has remained relatively steady which might be expected to continue despite the low oil prices, particularly on sites in close

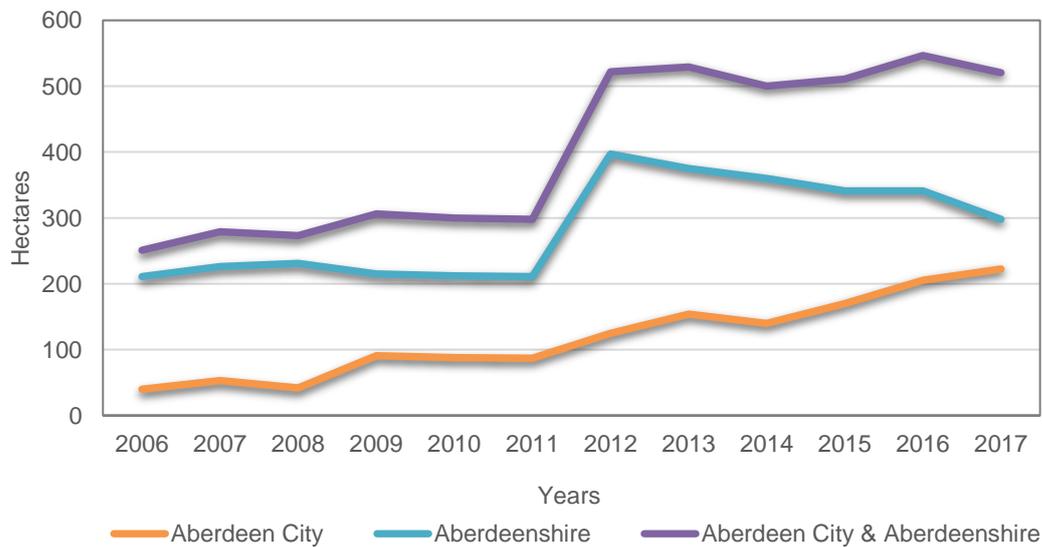
proximity to Aberdeen. NB: The monitored period for the Employment Land Audit changed from a calendar year to April-March in 2009.

Figure 10: Employment Land Development Rates 2006-2016/17



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, a reduction in new build construction as a result of the prolonged downturn in the oil and gas industry over the past two years, particularly in the City, will result in fewer marketable sites coming forward and existing sites being taken up at a slower rate. The increase in marketable supply from 2016 to 2017 highlighted in Aberdeen City is due to 17.15ha that has now been added to the supply in the Aberdeen Airport area. Aberdeenshire shows a slight fall in the marketable supply since 2012 as sites have been taken up and some LDP allocations have moved into the constrained supply as they are not now expected to come forward in the short to medium term.

Figure 11: Trends in Marketable Employment Land in Aberdeen City and Shire 2006-2017



4.4.3 Figure 12 below shows the dramatic fall in the price of Brent Crude during late 2014 from over \$100 per barrel to a level in the region of \$50 over 2016/17 where it has remained relatively stable. In response, the rate of take up of employment land in Aberdeen City has reduced over the past year, now that sites which had commenced before the downturn in oil prices have been largely built out. However, the take up in Aberdeenshire for industrial uses on sites close to the City has been relatively steady and in line with the 10 year average.

Figure 12: Europe Brent Crude Price January 2010 – September 2017



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)

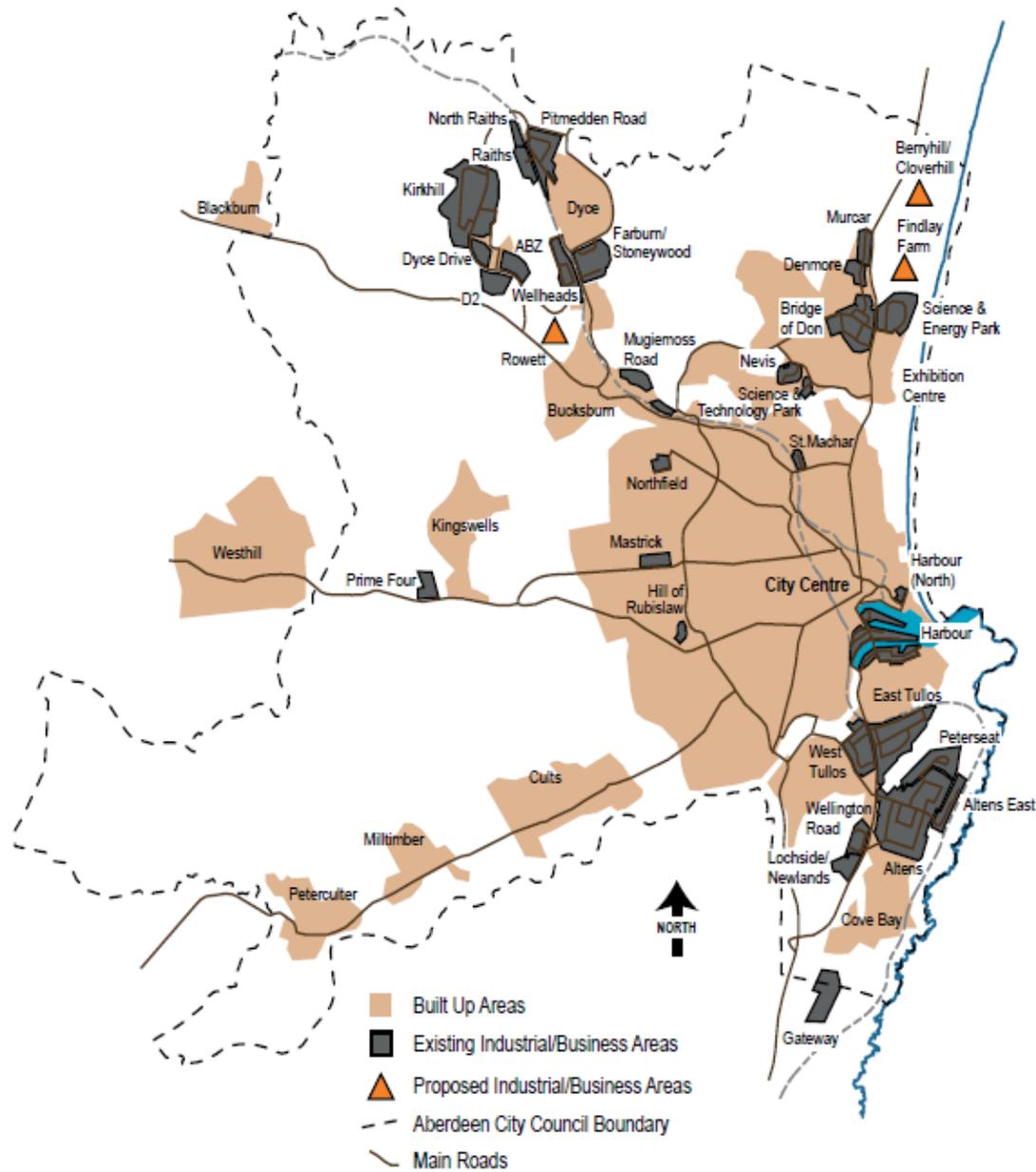
The area of land under construction but not yet complete. This land is not included within the land supply totals.

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	Serviced	Established	Constrained	Marketable	(of which) immediately available	Under Construction
Lochside/Newlands (Balmoral Business Pk)	Balmoral Group	None	Yes	2.2	0	2.2	2.2	0
Aberdeen Gateway	Halladale Muir	None	Yes	2.4	0	2.4	2.4	0
Peterseat	Forbes Development Ltd	None	Yes	8.6	0	8.6	8.6	0
Altens East & Doonies	Aberdeen City Council / Esson Properties	None	Part	8.2	0	8.2	8.2	0
Aberdeen Science & Energy Park	Scottish Enterprise	Class 4 Only	Yes	1.5	0	1.5	0	0
Aberdeen Innovation Park	Scottish Enterprise	Class 4 Only	Yes	3	0	3	0	0
Findlay Farm	Aberdeen Science Parks LP	Class 4 Only	No	16.4	0	16.4	0	0
The Core Berryhill/Cloverhill	Private		No	68.4	0	68.4	0	0
Airport Dyce Drive	Miller, Abstract, ABZ Development Ltd	Ownership & Infrastructure	Part	77.35	30.1	47.25	21.5	0
Dyce Drive 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
OP9 Grandhome	Grandhome Trust		No	5	5	0	0	0
OP18 Craibstone North & Walton Farm	Private		No	1.5	1.5	0	0	0
OP19 Rowett North	Private		No	34.5	0	34.5	0	12
Prime Four	Drum		Part	16.5	0	16.5	5.9	0
OP33 Greenferns	ACC		No	10	10	0	0	0
OP34 East Arnhall	Private		No	1	1	0	0	0
OP38 Countesswells	Countesswells Consortium		No	10	0	10	0	0
O48 Oldfold	CALA		No	5	5	0	0	0
OP59 Loirston	Private		No	11	11	0	0	0
Report Total				286.05	63.6	222.45	52.3	12



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)

Site Ref No	Location	Settlement	LDP 2017 Code	LDP 2012 Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	Imm Available	Under Const
Banff & Buchan												
B/AB/E/001	Cornhill Road	Aberchirder	BUS	BUS1			Part	1	0	1	0	0
B/FR/E/002	West Shore	Fraserburgh	BUS1	BUS1	Aberdeenshire Council		Yes	0.27	0	0.27	0.27	0
B/FR/E/003b	Chapelhill Rosehearty/ Watmill	Fraserburgh	BUS3	BUS2	Private	Infrastructure	Part	10.13	10.13	0	0	0
B/FR/E/007	Fairney Business Park	Fraserburgh	BUS1	BUS1	Aberdeenshire Council		Yes	1.18	0	1.18	1.18	0
B/FR/E/008	Phingask	Fraserburgh	OP3	E1	Private	Physical, Marketability	No	16.5	16.5	0	0	0
B/FR/E/009	Kirkton Development	Fraserburgh	OP1	M1	Private	Other	No	4	4	0	0	0
B/IB/E/002	Inverboyndie- Phase 1	Inverboyndie	BUS	BUS1	Private		Yes	1.4	0	1.4	1.4	0
B/IB/E/003	Inverboyndie- Phase 2	Inverboyndie	BUS	BUS1	Private		No	1.4	0	1.4	0	0
B/MC/E/001	Buchan Road - East	Macduff	BUS	BUS1	Aberdeenshire Council			0.9	0	0.9	0.9	0
B/MC/E/003	Tarlair Business Park	Macduff	BUS	BUS2	Aberdeenshire Council		Yes	5.3	0	5.3	5.3	0
B/MC/E/004	Buchan Road- West	Macduff	BUS	BUS2	Private	Ownership	No	4.01	4.01	0	0	0
B/MC/E/005	Green Hills	Macduff	BUS	E1	Private		No	12	0	12	0	0
B/RH/E/001	South of Ritchie Road	Rosehearty	OP1	M1	Private	Infrastructure	No	2	2	0	0	0
Banff & Buchan Total:								60.09	36.64	23.45	9.05	0
Buchan												
U/AD/E/001	Land at Nether Backhill	Ardallie	OP1	M1	Private	Physical	No	0.3	0.3	0	0	0
U/AG/E/001	South of A948	Auchnagatt	OP1	M1	Private		No	0.5	0	0.5	0	0
U/CR/E/001	Land at Aulton Road	Cruden Bay	OP1	M1	Claymore Homes		No	2	0	2	0	0
U/HT/E/001	East of A90	Hatton	OP4	E1	A Wyness & Sons		No	0.8	0	0.8	0	0
U/LG/E/001	Inverquhomery Road	Longside	BUS	BUS1	Private		No	1.2	0	1.2	0	0
U/LG/E/002	Land at Skinner Road	Longside	OP1	M1	Unknown	Infrastructure, Other	No	1.7	1.7	0	0	0
U/ML/E/003	Newlands Road	Mintlaw	BUS1	BUS1	Claymore Homes		Part	0.62	0	0.62	0.62	0.29
U/ML/E/005	Land at Nether Aden	Mintlaw	OP1	M1	Bancon Homes	Other	No	5	5	0	0	0

U/PH/E/002	Balmoor Industrial Estate	Peterhead	BUS2	BUS2	Aberdeenshire Council		Yes	0.81	0	0.81	0.81	0.93
U/PH/E/003	Dales Industrial Estate West	Peterhead	BUS3	BUS3/BUS4	Aberdeenshire Council		Part	8.75	1.91	6.84	2.06	0
U/PH/E/004a	Dales Industrial Estate East	Peterhead	BUS3	BUS4	Private		Part	1.71	0	1.71	1.71	0
U/PH/E/005a	Damhead/Upperton Industrial Estate North	Peterhead	BUS3	BUS4/BUS6	Private		Part	2.76	0	2.76	0	0
U/PH/E/006	Energetica Industry Park (Upperton Ind Est)	Peterhead	BUS3	BUS6/BUS7	Scottish Enterprise		No	16.6	0	16.6	0	0
U/PH/E/007	Wellbank (North)	Peterhead	BUS3	BUS5	Score Group Ltd	Other	Part	26.9	9.9	17	0	0
U/PH/E/008	Burnside Business Park	Peterhead			Private		Part	0.37	0	0.37	0.37	0
U/PH/E/009	Waterside (Invergie Meadows)	Peterhead	OP1	M1	Private	Other	No	4	4	0	0	0
U/PH/E/010	Land at Wellbank (South)	Peterhead	OP6	E1	Score Group Ltd		Part	7.75	0	7.75	0	0
Buchan Total:								81.77	22.81	58.96	5.57	1.22
Formartine												
F/BA/E/001	Land at Balmedie South	Balmeddie	OP1	M1	Aberdeenshire Council	Other	No	5	2.5	2.5	2.5	0
F/BD/E/001	Land at Blackdog	Blackdog	OP1	M1	Private	Infrastructure, Other	No	4	4	0	0	0
F/CT/E/001	Cuminestown Industrial Estate	Cuminestown	BUS	BUS1	Aberdeenshire Council	Marketability, Other	No	0.54	0.54	0	0	0
F/EL/E/005	Balmacassie South	Ellon	BUS	BUS1			Yes	4.23	0	4.23	4.23	0.11
F/EL/E/006	Balmacassie	Ellon	OP4	E1	Private		No	9	0	9	0	0
F/EL/E/007	Cromleybank	Ellon	OP1	M1	Scotia Homes	Other	No	2	2	0	0	0
F/FV/E/001	South of Westfield Farm	Foveran	OP1	M1	Harper & Cochrane Ltd		No	2	0	2	0	0
F/FV/E/002	South of Turin Way	Foveran	OP3	E1	Private		No	1.5	0	1.5	0	0
F/NB/E/002	Loanhead Phase 2	Newburgh	BUS	BUS1	Private		No	1.96	0	1.96	0	0
F/NB/E/007	West of Airyhall	Newburgh	OP1	M1	Private		No	0.8	0	0.8	0	0
F/OM/E/003b	Oldmeldrum Business Park/ Meadows Industrial Estate	Oldmeldrum	BUS	BUS1	Private		Part	3.2	0	3.2	3.2	0
F/OM/E/005	West of Coutens Park	Oldmeldrum	OP2	M2	Private	Other	No	4.2	4.2	0	0	0
F/PM/E/001	Milldale East	Pitmedden	BUS2	BUS2	Private	Ownership, Infrastructure	No	1.58	1.58	0	0	0
F/RO/E/002	Rothienorman West Of B9001	Rothienorman	BUS	BUS1	Private	Marketability	No	1.22	1.22	0	0	0
F/RR/E/001	West of Rashierville Cottages	Rashierville	OP1	E1	Private		No	2	0	2	0	0

F/TF/E/001	Markethill North	Turriff	BUS1	BUS1	Aberdeenshire Council		Yes	0.2	0	0.2	0.2	0
F/TF/E/004	East Of Markethill Industrial Estate	Turriff	BUS1	BUS1	Private		No	2.02	0	2.02	0	0
F/TF/E/005	South Of Markethill Road	Turriff	BUS1	BUS1		Ownership	Yes	0.67	0.67	0	0	0
F/TF/E/007	North east of Markethill Industrial Estate	Turriff	OP3	E1	Private		No	1	0	1	0	0
F/TF/E/008	East of Markethill Industrial Estate	Turriff	OP4	E2	Private		No	1.7	0	1.7	0	0
F/TF/E/009	Broomhill Road/Markethill Industrial Estate	Turriff	OP5	E3	Private		No	4.5	0	4.5	0	0
F/TF/E/010	Adjacent to Wood of Delgaty	Turriff	OP1	M1	Private	Other	No	10	10	0	0	0
F/TV/E/003	The Grange	Tarves	OP1	M1	Private	Other	No	3	3	0	0	0
F/US/E/001	Woodlea East	Udny Station	OP1	M1	Private	Ownership	No	1	0	1	0	0
F/WP/E/001	West Pitmillan	West Pitmillan	OP1	E1	Private		No	3.1	0	3.1	0	0
Formartine Total:								70.42	29.71	40.71	10.13	0.11
Garioch												
G/BB/E/004	Blackburn Business Park	Blackburn	BUS	BUS	Private		Part	0.61	0	0.61	0.61	0.3
G/IS/E/005	Insch Business Park, Muiryheadless	Insch	BUS	BUS	Aberdeenshire Council		Yes	2.13	0	2.13	2.13	0.24
G/IS/E/006	South Of Insch Business Park	Insch	BUS	BUS	Private	Ownership	No	2.2	2.2	0	0	0
G/IS/E/007	North of Insch Business Park	Insch	OP4	E1	Private		No	5	0	5	0	0
G/IV/E/005c	Port Elphinstone North	Inverurie	BUS10	BUS6	Private	Contamination	No	2.5	2.5	0	0	0
G/IV/E/008	Highclere Business Park	Inverurie	BUS3	BUS3	Private		Yes	0.6	0	0.6	0.6	0
G/IV/E/012	Inverurie Town Centre	Inverurie	OP2	M2	Private/Aberdeenshire Council	Other	No	0.5	0.5	0	0	0
G/IV/E/013	Crichie	Inverurie	OP11	E1	Crichie Dev Ltd/Dandara	Infrastructure	No	19	19	0	0	0
G/IV/E/014	Adj to Axis Business Centre	Inverurie	OP12	E2	ANM Group Ltd		No	1.5	0	1.5	0	0
G/IV/E/015	Thainstone	Inverurie	OP13	E3	ANM Group Ltd		No	10	0	10	0	0
G/IV/E/016	Port Elphinstone Central	Inverurie	BUS6	BUS7	Kilbride Resources Ltd		No	2.5	0	2.5	0	0
G/IV/E/017	Crichiebank Business Centre	Inverurie	BUS5	BUS5	Private		Part	0.6	0	0.6	0	0
G/IV/E/018	Kirkwood Commercial Park, Thainstone	Inverurie	OP16		Kirkwood Investments Ltd		Yes	1.7	0	1.7	1.7	0
G/KM/E/002	Quithie Road	Kemnay	BUS1	BUS1	Private	Ownership	No	4.3	4.3	0	0	0

G/KM/E/004	Fyfe Park	Kemnay	BUS2	BUS2	Private		Part	2.8	0	2.8	0	0
G/KS/E/001x	Kingseat	Kingseat		BUS1	Private	Land Use	Part	1	1	0	0	0
G/KT/E/002	Kintore - Midmill North	Kintore	BUS3	BUS3	Private		Yes	0.9	0	0.9	0.9	0
G/KT/E/002b	Kintore North/Bridgend	Kintore	BUS2	BUS2	Private	Physical	No	5	2.5	2.5	0	0
G/KT/E/003b	Kintore Business Park	Kintore	BUS1	BUS1	Private		Yes	0.6	0	0.6	0	0
G/KT/E/004	Kintore East	Kintore	OP1	M1	Malcolm Allan		Yes	0	0	0	0	4.9
G/KT/E/005	Kintore South	Kintore	OP5			Other	No	6	6	0	0	0
G/MB/E/003	Land at Millbank Crossroads	Millbank	OP1	M1	Cluny Estates	Infrastructure	No	1.3	1.3	0	0	0
G/NM/E/003	Land at Redwood Cottage	Newmachar	OP3	E1	Kirkwood Homes		No	5	0	5	0	0
G/WH/E/007	Arnhall/Silvertrees Business Parks	Westhill	BUS	BUS	Chap Construction		Yes	0.95	0	0.95	0.95	0
G/WH/E/008	Arnhall Gateway	Westhill	OP2	E1	Westhill Dev Co Ltd		Yes	5.65	0	5.65	5.65	0
G/WH/E/009	Former Blockworks Site, Straik Road	Westhill			Private		Yes	0.86	0	0.86	0.86	0
Garioch Total:								83.2	39.3	43.9	13.4	5.44
Kincardine & Mearns												
K/AU/E/001	East of Glenfarquhar Rd	Auchenblae	OP1	M1	Kincardineshire Investment Co	Other	No	1	1	0	0	0
K/CH/E/001	Chapelton - New Settlement	Chapelton	OP1	M1	Elsick Dev Co Ltd		No	11.5	0	11.5	0	0
K/DL/E/001	Adj Bowling Green	Drumlithie	OP1	M1	Peterkin Homes Ltd	Land Use	No	0.5	0.5	0	0	0
K/EW/E/001	Newesk	Edzell Woods	OP1	M1	Carnegie Base Services	Marketability, Infrastructure	No	68.7	67	1.7	1.7	1.7
K/GD/E/001	Linton Business Park	Gourdon	BUS	BUS	Aberdeenshire Council		Yes	1.29	0	1.29	1.29	0
K/GD/E/002	East of Linton Business Park	Gourdon	OP1	E1	Private		No	3	0	3	0	0
K/LK/E/004	Mart Site West, Market St	Laurencekirk			Aberdeenshire Council		Yes	0.11	0	0.11	0.11	0
K/LK/E/005	North Laurencekirk	Laurencekirk	OP1	M1	Kirkwood Homes	Infrastructure	No	11	11	0	0	0
K/LM/E/001	The Chapel	Luthermir	OP1	M1	Private	Other	No	0.25	0.25	0	0	0
K/LM/E/002	Land at Aberluthnott Church	Luthermuir	OP2	M2	Private	Other	No	0.25	0.25	0	0	0
K/MK/E/001	West of Marykirk	Marykirk	OP1	M1	Private		No	0.5	0	0.5	0	0
K/MW/E/006	Cairnrobin	Marywell	BUS	BUS	Private	Other	Part	56.7	37	19.7	0	0

K/NH/E/001	West Monduff Farm	Newtonhill	BUS	BUS	A&D Developments (Scotland) Ltd		No	6.65	0	6.65	0	0
K/NH/E/002	Land to West of A90	Newtonhill	OP2	E1	Private		No	12.1	0	12.1	0	0
K/PL/E/004	Badentoy Industrial Estate	Portlethen	BUS1	BUS1	Badentoy Developments Ltd		Yes	6.9	0	6.9	0.4	0
K/PL/E/005	City South Business Park	Portlethen	BUS2	BUS2	Dandara		Part	10.6	0	10.6	10.6	0
K/PL/E/008	Land to NW of Badentoy	Portlethen	OP1	E1	Private		No	6.5	0	6.5	0	0
K/PL/E/009	Fairview	Portlethen	OP2	E2	Private		No	7	0	7	7	0
K/SC/E/001	Roadside Adjacent A92	St Cyrus	OP1	M1	Private		No	2	0	2	0	0
K/ST/E/003	East Newtonleys	Stonehaven	BUS2	BUS2	Bancon Developments		No	11.31	0	11.31	0	0
K/ST/E/004	East Newtonleys	Stonehaven	OP5	E2	Bancon Developments		No	7	0	7	0	0
K/ST/E/005	Redcloak	Stonehaven	BUS3	E1	Private		No	1	0	1	0	0
Kincardine & Mearns Total:								225.86	117	108.86	21.1	1.7
Marr												
M/AB/E/004	Land to the west of Tarland Road	Aboyne	OP1	M1	Private	Land Use	No	1	1	0	0	0
M/AF/E/002b	Land at Wellheads	Alford	OP2	M2	Kirkwood Homes		No	1	0	1	0	0
M/AF/E/003	School Campus Site	Alford	OP1	M1	Aberdeenshire Council	Ownership	Yes	1.2	1.2	0	0	0
M/BN/E/002	Hill Of Banchory	Banchory	BUS1	BUS1	Bancon Developments		Yes	5.9	0	5.9	4.3	0
M/BN/E/003	Burn O'Bennie	Banchory	BUS2	BUS2	Bancon Developments		No	2.21	0	2.21	0	0
M/BN/E/004	Lochside of Leys	Banchory	OP2	M2	Private	Other	No	2	2	0	0	0
M/HT/E/002	Steven Road	Huntly	BUS2	BUS2	RB Farquhar		Yes	0.88	0	0.88	0.88	0
M/HT/E/004a	Deveron Road	Huntly	BUS1	BUS1	Private		No	1.75	0	1.75	0	0
M/HT/E/005	Mart	Huntly	BUS3	BUS3	Private		No	3.28	0	3.28	0	0
M/HT/E/006	Adj Linnorie	Huntly	OP6	E1	Private		No	4.5	0	4.5	0	0
M/KM/E/001	Opposite School	Kennethmont	OP3	E1	Private		No	0.6	0	0.6	0	0
M/KN/E/001	Land at Haugh Farm	Kincardine O'Neil	OP1	M1	Private	Other	No	0.4	0.4	0	0	0
M/KN/E/002	Willowbank	Kincardine O'Neil	OP4	E1		Ownership	No	0.8	0.8	0	0	0
M/LD/E/002	Lumsden	Lumsden	BUS	BUS	Private		No	0.3	0	0.3	0	0

M/MF/E/001	Muir Of Fowlis	Muir of Fowlis	BUS	BUS	Private		No	0.3	0	0.3	0	0
M/RN/E/001	Rhynie Richmond Avenue East	Rhynie	BUS	BUS	Aberdeenshire Council		Yes	0.18	0	0.18	0.18	0
M/RN/E/002	Land north of Richmond Avenue	Rhynie	OP1	M1	Private	Other	No	0.6	0.6	0	0	0
M/TL/E/002	Glendeskry	Tarland	OP1	M1	Private	Other	No	1	1	0	0	0
M/TP/E/001	Station Garage	Torphins	OP1	BUS	Private		No	1.22	0	1.22	0	0
Marr Total:								29.12	7	22.12	5.36	0
Report Total:								550.46	252.46	298	64.61	8.47

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

Strategic Growth Area	Established	Constrained	Marketable Total	Immediately Available	Under Construction
Ellon-Blackdog	32.83	8.5	24.33	6.73	0.11
Peterhead-Hatton	70.45	15.81	54.64	4.95	0.93
Total	103.28	24.31	78.97	11.68	1.04
Huntly-Pitcaple	19.74	2.2	17.54	3.01	0.24
Inverurie-Blackburn	52.01	30.5	21.51	3.81	5.2
Total	71.75	32.7	39.05	6.82	5.44
Portlethen-Stonehaven	137.26	37	100.26	18	0
Sth of Drunmlithie-Laurencekirk	11.11	11	0.11	0.11	0
Total	148.37	48	100.37	18.11	0
Aberdeen HMA Local Growth	37.6	15.38	22.22	10.66	0
Rural HMA Local Growth	189.46	132.07	57.39	17.34	1.99
Total	227.06	147.45	79.61	28	1.99
Report Total	550.46	252.46	298	64.61	8.47

Regeneration Priority Area	Established	Constrained	Marketable Total	Immediately Available	Under Construction
Regeneration Priority Area	127.84	52.45	75.39	13.1	0.93
Outwith Regeneration Priority Area	422.62	200.01	222.61	51.51	7.54
Report Total	550.46	252.46	298	64.61	8.47

Appendix 5: Development Rates in Aberdeen City 2005 - 2016/17

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

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

Appendix 5: Development Rates in Aberdeenshire 2005 - 2016/17 (all figures in hectares)

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

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

Details of Aberdeen City and Aberdeenshire Completions 2016/17

Site Ref	Site Name	Settlement	Plot Size (h)	Planning Permission	Description	Building size (sq m)
U/PH/E/001	Blackhouse Industrial Estate	Peterhead	0.28	2008/4002	6 industrial units	705
G/IV/E/008	Highclere Business Park	Inverurie	0.65	2014/3979	Warehouse and office building	3049
G/IV/E/018	Kirkwood Commercial Park, Thainstone (Plot 16)	Inverurie	1.3	2014/1994	Warehouse and office building	3458
G/KT/E/004	Kintore East (Site N)	Kintore	1.16	2015/3773	Office/workshop/warehouse/yard	697
G/WH/E/007	Arnhall/Silvertrees Business Parks (Site 7)	Westhill	0.6	2015/3777	Office and industrial building	1962
G/WH/E/008	Arnhall Gateway (Unit 1)	Westhill	0.4	2016/1875	Office/warehouse buildings	1727
G/WH/E/008	Arnhall Gateway (Unit 2)	Westhill	0.4	2014/1065	Office/warehouse buildings	1440
K/GD/E/001	Linton Business Park	Gourdon	0.24	2015/3496	Office building	250
K/MW/E/006	Cairnrobin (Cairnrobin Business Park Plot 6)	Marywell	2.8	2015/2192	Workshop/office/yard	1279
K/MW/E/007	Gateway Business Park (Site E8)	Marywell	0.73	2015/0715	Industrial/office building	1348
K/MW/E/007	Gateway Business Park (Site E7)	Marywell	0.7	2015/0714	Industrial/office building	1348
K/PL/E/004	Badentoy Industrial Estate (North)	Portlethen	0.7	2015/0507	Recycling centre	21
K/PL/E/004	Badentoy Industrial Estate (North)	Portlethen	1.6	2015/1755	Warehouse/office/wash bay/yard	3979
K/PL/E/004	Badentoy Industrial Estate (North)	Portlethen	0.8	2016/0943	Warehouse/office/yard	864
M/BN/E/002	Hill of Banchory	Banchory	0.1	2014/1537	Self Service Car Wash	116
M/HT/E/002	Steven Road	Huntly	0.68	2014/4383	Workshop and Office	1106
F/EL/E/005	Balmacassie South	Ellon	1.07	2015/0144	HWRC (Temporary office)	23
	Liberty House, Palmerston Place (North Dee Business District)	Aberdeen City	0.12	131844	Class 4 office space	2931
	The Silver Fin, Union Street	Aberdeen City	0.23	131135	Class 4 office space	12319
	Lloyds Register, Prime Four	Aberdeen City	0.7	150113	Class 4 office space	10792
	ACC - Waste Management Centre	Aberdeen City	2.7	150432	Recycling Facility, Refuse Fuel plant, Office,	10260



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