

SERVICE UPDATE

<u>Name of Cluster:</u>	Strategic Place Planning
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<u>Title of Update:</u>	Publication of Business and Industry Land Audit 2023
<u>Author:</u>	David Berry – Senior Planner
<u>Chief Officer:</u>	David Dunne – Chief Officer Strategic Place Planning
<u>Email address:</u>	dberry@aberdeencity.gov.uk

UPDATE:

Publication of Business and Industry Land Audit 2023

The latest Business and Industry Land Audit has been published. A copy is attached at Appendix 1 and the document can also be viewed online at [Delivery Programme and Monitoring | Aberdeen City Council](#).

The Business and Industry Land Audit is a joint report prepared by officers of Aberdeen City and Aberdeenshire Councils. It is published every two years and provides information on the availability of land for business and industrial development within the two Council Areas.

The audit is used to monitor the proposals in the Local Development Plans (LDPs) of both Councils, which allocate a range of sites for business and industrial development in line with the requirements of National Planning Framework 4 (NPF4). It also provides an indication of trends and changes in patterns of work, including in the context of the transition towards Net Zero.

The latest Business and Industry Land Audit has a base date of 1st April 2023 and monitors activity in the supply and development of land for business and industry since the previous version of the audit was published in 2021.

From the City Council's perspective, one of the main updates since the previous audit is that the total established land supply for business and industrial use reduced by 6% to 254 hectares. This change is primarily a result of the re-allocation in the 2023 LDP of a large former employment site at Cloverhill, where just over 530 affordable homes are currently under construction as part of the Council's affordable housing new-build programme.

Notwithstanding, there remains a substantial supply of land available for business and industrial development, with more than 250 hectares in the overall land supply, and almost 200 hectares of 'marketable' land (land with a secure planning status, capable of being serviced, with no major constraints to development taking place within the next 5 years), as can be seen from Table 1 overleaf. The 2023 LDP was prepared on the basis that employment land allocations of 105 hectares are required during the plan period to 2032. At more than 250 hectares, the current overall land supply therefore amounts to more than double this requirement.

Table 1: Aberdeen City Business and Industry Land Supply 2021 and 2023

	2021	2023	Change
Established Supply	270	254	-6%
Constrained Supply	64	62	-3%
Marketable Supply	206	192	-7%
Immediately Available Supply	49	42	-14%
Under Construction	1	5.2	+420%

Other changes to the business and industry land supply since the previous audit included the addition of land at Prime Four (following the inclusion of a site in the 2023 LDP which provides for an extension of the business park), and the commencement of the SeedPod development at Craibstone (which will create an innovation hub for the food and drink industry in the northeast and help to deliver objectives in the Regional Economic Strategy). The audit also shows that 15 multi-let industrial units have been completed at the ABZ business park since the previous update in 2021.

With respect to longer term trends, the audit notes that the take up of employment land within Aberdeen over the past five years (2018/19 – 2022/23) has been considerably lower than the preceding five years (2013/14 – 2017/18). This is perhaps unsurprising and can generally be attributed to the challenges experienced in the oil and gas industry over this period as well as the effects of the Covid pandemic.

The main findings of the audit were discussed with the Regional Property Working Group on 8 February 2024, attended by local commercial property agents together with representatives from Invest Aberdeen and the two councils. The agents present confirmed that there is currently a surplus of supply for both office and industrial space within Aberdeen City and Shire. However, they reported that there is currently a demand for good quality space available for immediate occupation and that this type of accommodation is currently limited. They also noted that high construction and servicing costs are continuing to have an impact on both the development of new build space and refurbishment of existing buildings.

The Audit findings will form an important part of the evidence base for the next Aberdeen LDP and will inform its policies and site allocations for business and industrial land.

Appendix 1

Aberdeen City & Aberdeenshire Business and Industry Land Audit 2023



Aberdeenshire
COUNCIL



Aberdeen City & Aberdeenshire Council Business and Industry Land Audit 2023

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Strategic Place Planning
Marischal College
Broad Street
Aberdeen
AB10 1AB



Planning & Economy
Woodhill House
Westburn Road
Aberdeen
AB16 5GB

Background and Purpose

The Business and Industry Land Audit is produced jointly by Aberdeen City and Aberdeenshire Councils on a two-yearly basis. It monitors and provides recent and accurate information on the supply and availability of employment land for business and industrial use within the two Council Areas. The 2023 Audit has a base date of 1st April 2023.

The Business and Industry Land Audit can also be viewed on the Councils' websites:

[Aberdeen City Council](#)

[Aberdeenshire Council](#)

The audit is used to monitor the policies and proposals relating to employment land for business and industrial use in the Local Development Plans (LDP) of both Councils. It is also used to provide an indication of potential trends and changes in patterns of work, including in the context of the transition towards Net Zero. The information provided assists with the preparation of the economic strategy, 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 Aberdeen City and Aberdeenshire.

National Planning Framework 4 (NPF4) and Local Development Plans (LDPs)

NPF4 was adopted by Scottish Ministers in February 2023 and now forms part of the statutory development plan. NPF4 (page 80) states that local development plans should allocate sufficient land for business and industry, taking into account business and industry land audits, in particular ensuring that there is a suitable range of sites that meet current market demand, location, size and quality in terms of accessibility and services. NPF4 does not state a specific land requirement target for business and industry land allocations. Both Aberdeen City and Aberdeenshire adopted their respective local development plans in 2023, and both allocate a range of sites for business and industrial development.

Regional Spatial Strategy and Regional Economic Strategy

An indicative Regional Spatial Strategy for Aberdeen City and Aberdeenshire was produced in September 2020, and a formal Regional Spatial Strategy will be produced in the future once new legislation requiring its production comes into force. The Regional Economic Strategy provides a shared vision and ambition for the future of the northeast of Scotland to align commitment, investment and action for economic growth and diversification. The regional focus on diversification targets sustainable business growth in key sectors and high-value green jobs to drive economic transformation and a just transition towards Net Zero that provides high quality work, training and skills opportunities.

Methodology

The **established** land supply includes all employment land allocated or safeguarded, primarily for Class 4, 5 and 6 uses in the local development plan or with a valid planning approval for these uses. Land is defined as **marketable** where sites are serviced or serviceable and expected to be capable of coming forward within the next 5 years, and includes land classed as **immediately available**. Land which is not currently considered to be marketable is classed as **constrained** land. A glossary is included at Appendix 1, which provides a more detailed definition of these and other terms.

Employment land information is monitored via the determination of planning applications, the implementation of planning consents, building standards data and site visits. Internal consultation is carried out with Planning Policy, Delivery, Property and Economic Development teams as appropriate within each Council

Aberdeen City Council Business and Industry Land Supply 2023

Aberdeen City Business and Industry Land Supply 2021 and 2023 in Hectares

	2021	2023	Change
Established	270	254	-6%
Constrained	64	62	-3%
Marketable	206	192	-7%
Immediately Available	49	42	-14%
Under Construction	1	5.2	

Table 1: Aberdeen City Business and Industry Land Supply 2021 and 2023

The established land supply reduced by 6% to 254ha in the period 2021 to 2023. As can be seen from the detailed site information in Appendix 3, the reduction in the established land supply was primarily a result of the re-allocation of a single large site at Cloverhill, which was allocated for business and industrial development in the former 2017 LDP but was re-allocated for housing development in the new 2023 LDP. Other more minor changes took place, including at the OP18 Craibstone North site (which moved out of the established supply following the commencement of construction on site in early 2023) and at the Prime Four site (where land was added into the effective supply following the inclusion of allocation OP63 in the 2023 LDP, which provides for an expansion of this business park).

The Marketable, Immediately Available, and Constrained land supply also fell by 7%, 14%, and 3% respectively.

Aberdeenshire Council Business and Industry Land Supply 2023

Aberdeenshire Business and Industry Land Supply 2021 and 2023 in Hectares

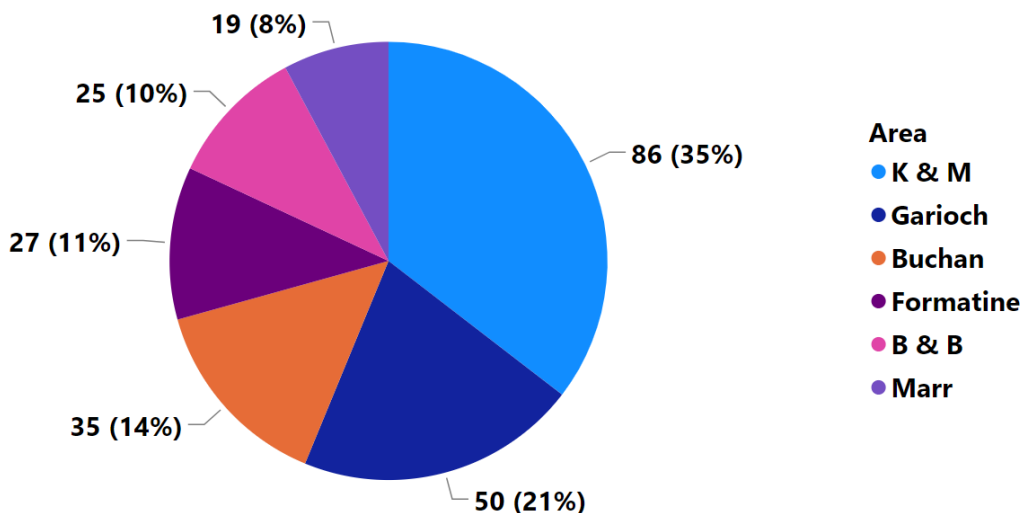
	2021	2023	Change
Established	518	599	+15%
Constrained	281	356	+27%
Marketable	237	243	+2%
Immediately Available	56	69	+23%
Under Construction	1.2	3.25	

Table 2: Aberdeenshire Business and Industry Land Supply 2021 and 2023

New sites have been allocated in the 2023 LDP which have increased the established supply, particularly large allocations on former airfield sites at Longside Airfield (OP1) and Fordoun Aerodrome (BUS2), although much of this land is not expected to be capable of coming forward in the next 5 years and has been classed as constrained. Other sites have significantly increased in size, such as Balmacassie at Ellon (OP4) and Redwood Cottage at Newmachar (OP3) and will require masterplans to progress any development. The marketable supply, which is land considered capable of being serviced and coming forward in the short to medium term of 5 years, has remained relatively steady. Around 69ha of this has been classed as immediately available for development on already serviced sites. Few sites were under construction at the audit base date of 1 April 2023, with nearly all of this being further development at City South Business Park, Portlethen.

Details of the individual sites in the audit can be found in Appendix 4.

Figure 1: Aberdeenshire Marketable Land Supply by Administrative Area in Hectares

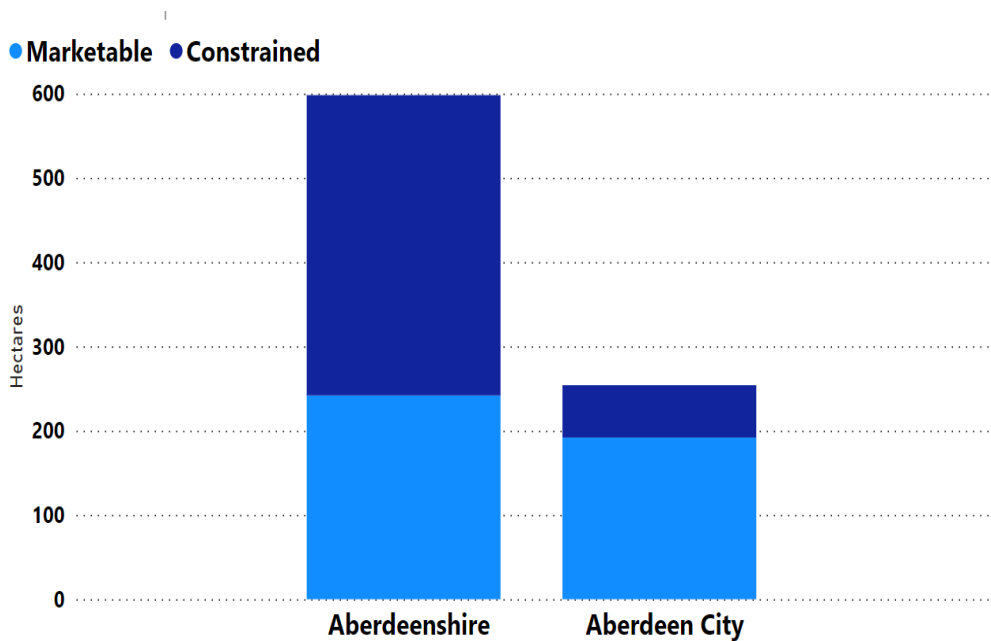


When split by Administrative Area, the largest proportion of marketable land falls within Kincardine and Mearns where large sites can be found at Marywell, Portlethen, Newtonhill and Stonehaven, in close proximity to the A90 and A92. Marr has the lowest proportion of marketable land due to the prevalence of smaller sites set in more rural locations.

Comparison of Marketable and Constrained Land Supply in Aberdeen City and Aberdeenshire

Aberdeenshire has a large amount of land allocated for business and industry uses spread over a wide geographical area compared to Aberdeen City, which has a much tighter administrative boundary. However, a higher proportion of the allocated land in Aberdeenshire is classed as constrained as it is not considered capable of coming forward for development within the short to medium term of 5 years.

Figure 2: Marketable and Constrained Land Supply in Aberdeen City and Aberdeenshire



Take Up of Employment Land in Aberdeen City and Aberdeenshire

Aberdeen City Past 10 Year Completions in Hectares

2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
17	15.9	15.3	3.4	0	12	0	4.5	0	1.14

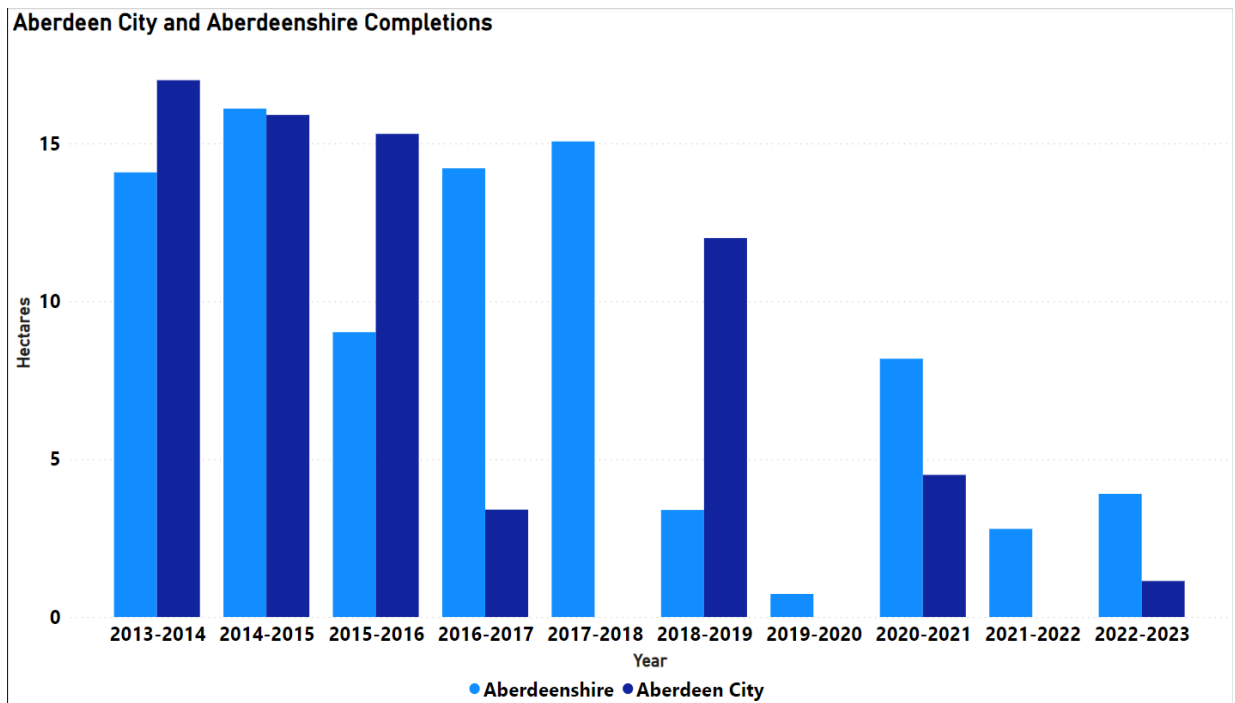
Table 3: Aberdeen City 10 Years Business and Industry Land Completions

Aberdeenshire Past 10 Year Completions in Hectares

2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
14.08	16.1	9.02	14.21	15.06	3.39	0.73	8.18	2.79	3.9

Table 4: Aberdeenshire 10 Years Business and Industry Land Completions

Figure 3: Aberdeen City and Aberdeenshire 10 Year Completions



In both Aberdeenshire and Aberdeen City the take up of employment land over the past five years have been considerably lower than that of the previous five years, attributed to the downturn in the oil industry and the continued effect of the Covid pandemic on work patterns. Sites that have been developed in Aberdeenshire over the two years since the last audit in 2021 are mostly close to Aberdeen at Ellon, Blackburn, Inverurie, Westhill and Banchory. Some of the take up has involved non business and industry uses, such as “drive thru” restaurants/take away premises and the new train station and car park in Kintore. In Aberdeen City 15 multi-let industrial units were completed at the ABZ business park.

Details of completions on individual sites over the past two years can be found in Appendix 2.

Market Activity

Office Space

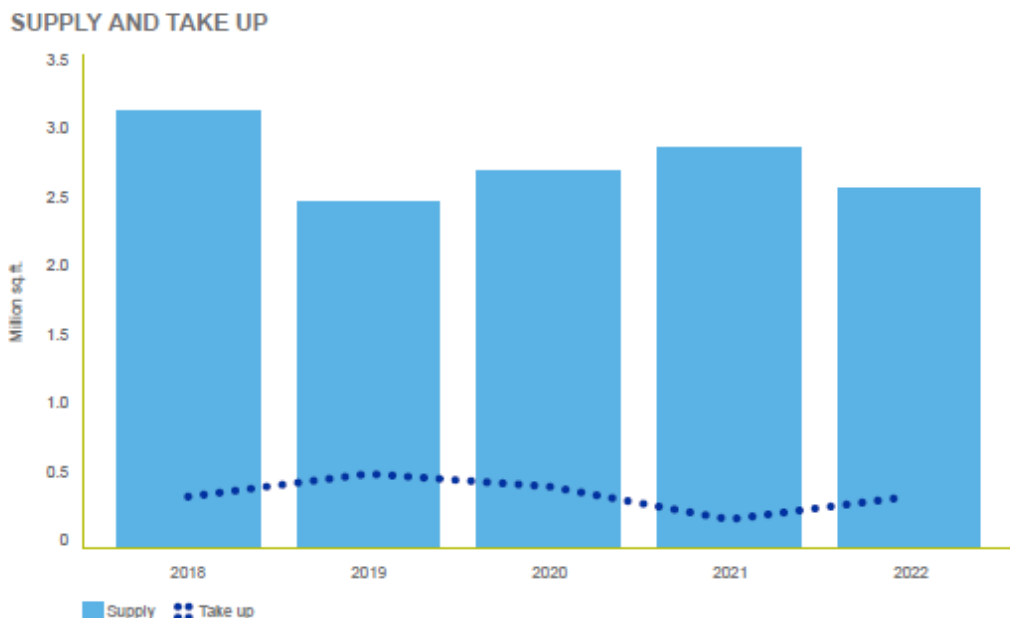
Local agents report that the office market in and around Aberdeen saw the lowest annual take-up of office space in the last decade in 2021, attributed to the effect of the Covid-19 pandemic. 2022 then saw a rapid 95% increase in office floorspace take up, which was more in line with the 5-year average.

With an enhanced emphasis on energy security and steady higher oil prices, some confidence has been reported in the local economy, which has encouraged office take up. Local agents indicate that the majority of the deals were for floor space between 5,000 and 10,000sq ft. The largest office take-up recorded in the area was from Shell, taking up 100,000sq ft at the Silver Fin building on Union Street, reflecting a continuing move towards centrally located Grade A office accommodation. Hybrid and remote working is still a factor affecting occupancy levels and it is not yet known if this is likely to change in the near future. However, there are potential sustainability benefits of flexible working patterns and they are likely to make a significant contribution in the context of Net Zero ambitions.

The development pipeline reportedly remains limited in the region with no new build office developments considered at present and with no new developments planned. However, the purchase and refurbishment of existing office stock is becoming more popular as the office market has continued to see a demand for better quality, modern and energy-efficient buildings. This is consistent with the intent of NPF4 (policy 9), which seeks to encourage, promote and facilitate the reuse of brownfield, vacant and derelict land and empty buildings, and to help reduce the need for greenfield development. It also helps to reduce the release of embedded carbon.

Overall, the supply of existing office space continues to far outweigh demand, as shown in the graph below, and the outlook remains uncertain.

Figure 4: Aberdeen Office Supply and Take up (Ryden Scottish Property Review 2023)



Industrial Space

Local agents observe that the industrial market in and around Aberdeen remains closely linked to the energy sector and saw an improvement in 2022, with total take up increasing by 34% compared to the previous year.

Overall supply of existing industrial space has continued to outweigh demand, although supply of good quality stock is reported as more limited. Development of speculative new build industrial premises is considered low, and it is not felt that this position is likely to change in the short term due to high interest rates and construction costs affecting the viability of undertaking development in the absence of a known end user.

The bulk of new development in the region over the past two years has comprised of small industrial starter units in Dyce, Inverurie, Banchory and Portlethen together with a very limited number of medium sized industrial units for specific occupiers.

Any improvement in the industrial property market is still seen as dependent on activity and confidence levels in the energy sector.

Source: [Ryden, 88th Scottish Property Review 2023](#)

Engagement with the Regional Property Working Group

The main findings of the audit were presented to the Regional Property Working Group on 8 February 2024, attended by local commercial property agents together with representatives from Invest Aberdeen and the two councils. Those agents present confirmed the significant excess of supply for both office and industrial space. However, they reported that there is currently a demand for good quality space available for immediate occupation and a lack of supply of this type of accommodation. High construction costs are continuing to have an impact on both the development of new build space and refurbishment of existing buildings, and an increase in the cost of servicing sites relative to land values is also seen as a barrier to development. Agents reported that a substantial proportion of the current interest remains linked to the oil and gas industry, particularly in and around Aberdeen City, but that there is uncertainty for the industry going forward. The Group noted that the fall in oil price since 2014 is reflected in the reduced take up of land over the past 5 years.

Brownfield Sites

Brownfield sites are defined as sites that have previously been developed for a purpose which has now ceased, existing buildings may have been demolished and a new use is yet to be established. These sites may provide an additional source of employment land where planning consent is obtained for business and industry uses. National Planning Framework 4 (NPF4) brownfield policy encourages, promotes, and facilitates the reuse of brownfield, vacant and derelict land, and empty buildings, to help reduce the need for greenfield development, further urban expansion, and improve the local environment. This helps to reduce the impact of vacant and derelict sites on communities, as well as reduce pressure in areas where growth is no longer sustainable.

Further Information

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

1. Aberdeen Local Development Plan 2023 [Aberdeen Local Development Plan | Aberdeen City Council](#)
2. Aberdeenshire Local Development Plan 2023 [Aberdeenshire Local Development Plan 2023 - Aberdeenshire Council](#)
3. Scottish Vacant and Derelict Land Survey 2022 [Scottish Vacant and Derelict Land Survey 2022 - gov.scot \(www.gov.scot\)](#)
4. Scottish Assessors Grampian Valuation Roll

Appendix 1: Glossary

Aberdeen City Local Development 2023 and Aberdeenshire Local Development Plan 2023

Adopted local development plan of how the two councils should develop over the next five years, directing the right development to the right locations.

Brownfield Sites

Land which has previously been built on or used for some other development purpose that has now ceased. Brownfield sites not allocated in the local development plan have only been included in the audit where planning permission has been granted for Use Classes 4, 5 and 6.

Constrained Land Supply

This includes land with constraints making it unlikely to come forward for development in the next five years. Constraints can include land subject to ownership issues (such as multiple ownership/unwilling sellers), land with insufficient infrastructure provision (such as poor road access, poor availability of services), land subject to flood risk or contamination and a significant lack of market demand. Mixed use sites with a constraint shown as “Other” do not yet have a development framework or masterplan and the employment land element is considered unlikely to come forward in the next five years.

Development Rates

These refer to the sum of the net area of employment land that has been taken up by development in a particular year.

Employment Land for Business and Industrial Use

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 Land Supply

This includes all undeveloped land that is allocated for industrial/business/employment use in finalised or adopted Local Plans or has a valid planning approval for these uses.

Greenfield Sites

Sites which have never been previously developed or are fully restored derelict land.

Immediately Available Land Supply

This is marketable land that currently has planning permission or has a secure planning status, meets business requirements, is currently serviced, has achievable connections to transport networks and has no major constraints to immediate development.

Marketable Land Supply

This is land that as well as meeting business requirements, has a secure planning status, is capable of being serviced and there are no major constraints to development taking place within the next 5 years. Land that is restricted to Class 4 (Business) use only is considered marketable. Land that is known to be held as 'option land' for existing companies' own expansion is not 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. Some LDP allocations that have yet to come forward and do not have a masterplan 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.

National Planning Framework 4 (NPF4)

NPF4 is a long-term plan looking to 2045, that guides spatial development, sets out national planning policies, designates national development and highlights regional spatial priorities. Since its adoption of 13th February 2023, it now forms part of the development plan, and influences planning decisions across Scotland

Serviced Land

Land for which servicing has been provided either on the site itself or the wider site including transport connections; electricity; water/drainage.

Under Construction

A site which is under construction but not yet complete. This land is not included within the land supply totals

Use Class 4 - Business

Defined in The Town and Country Planning (Use Classes) (Scotland) Order 1997 as a Use: (a) as an office, other than a use within paragraph 2 of class 1A (financial, professional and other services); (b) for research and development of products or processes; or (c) for any industrial process

Use Class 5 - General Industrial

Defined in the Town and Country Planning (Use Classes) (Scotland) Order 1997 as a Use for the carrying on of an industrial process other than one falling within class 4 (business).

Use Class 6 - Storage or Distribution

Defined in The Town and Country Planning (Use Classes) (Scotland) Order 1997 as a Use for storage or as a distribution.

Appendix 2: Details of Aberdeen City and Aberdeenshire Completions 2021/2022 and 2022/2023

Site Ref	Site Name	Council Area	Settlement	Plot Size (h)	Planning Permission	Description	Building size (sq m)	Year of Completion
F/EL/E/005	Ellon Commercial Park	Aberdeenshire	Ellon	1.14	APP/2021/2466	Erection of office and workshop with associated storage yards and parking	1,420	2022/23
F/WP/E/001	West Pitmillan	Aberdeenshire	West Pitmillan	0.9	APP/2018/1783	Erection of industrial building	975	2022/23
G/BB/E/004	Westpark Business Park	Aberdeenshire	Blackburn	0.15	APP/2021/1009	Erection of restaurant, hot food take away and EV charging bays	186	2022/23
G/KT/E/002b	South of Northern Road - A96	Aberdeenshire	Kintore	2.45	APP/2018/0731 & APP/2018/0778	Kintore train station and car park		2021/22
G/IV/E/015	Thainstone	Aberdeenshire	Inverurie	0.44	APP/2020/0803	Erection of 6 industrial units	990	2022/23
G/WH/E/007	Silvertrees Business Park	Aberdeenshire	Westhill	0.44	APP/2021/1680	Erection of industrial unit, ancilliary office space, parking and yard	1813	2022/23
G/WH/E/008	Arnhall Gateway	Aberdeenshire	Westhill	0.2	APP/2022/1236	Erection of café/bakery with drive thru facility, parking and EV charging points	167	2022/23
M/BN/E/002	Hill of Banchory	Aberdeenshire	Banchory	0.63	APP/2019/2762	Erection of 18 starter units and associated parking	1900	2022/23
M/HT/E/007	Land adj to Linnorie Business Park	Aberdeenshire	Huntly	0.34	APP/2018/2779	Change of land use to storage and distribution	1590	2021/22
OP23	Rest of ABZ Phase 1	Aberdeen City	Dyce	1.14	181449/MSC	Construction of 15 multi let industrial units	3,480	2021/22

Appendix 3: Business and Industry 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		Yes	2.2	0	2.2	2.2	0
Aberdeen Gateway	Halladale Muir		Yes	2.4	0	2.4	2.4	0
Peterseat	Forbes Development Ltd		Yes	8.6	0	8.6	8.6	0
Altens East & Doonies	Aberdeen City Council / Esson Properties		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		No	16.4	0	16.4	0	0
The Core Berryhill	Private		Part	40.5	0	40.5	0	3.2
Airport Dyce Drive	Miller, Abstract, ABZ Development Ltd	Ownership & Infrastructure	Part	73.65	30.1	43.55	17.8	0
Dyce Drive 9 Dyce Avenue	Morley		Yes	1.1	0	1.1	0	0
Raiths, Dyce (Kirkton Drive)	Private		Yes	1.5	0	1.5	1.5	0
Wellheads West	Private		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	0	0	0	0	2
OP19 Rowett North	Private		No	22.5	0	22.5	0	0
Prime Four	Drum		Part	29.5	0	29.5	0	0
OP33 Greenferns	ACC		No	10	10	0	0	0
OP34 East Arnhall	Private		Yes	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
TOTALS				253.95	62.1	191.85	41.6	5.2

Appendix 4: Business and Industry Land Supply in Aberdeenshire (all figures in hectares)

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
Banff and Buchan											
B/AB/E/001	Cornhill Road	Aberchirder	BUS	Aberdeenshire Council		Part	0.90	0.00	0.90	0.00	0.00
B/FR/E/002	West Shore	Fraserburgh	BUS1	Aberdeenshire Council	Ownership	Yes	1.09	0.82	0.27	0.27	0.00
B/FR/E/003b	Land to the East of Phingask	Fraserburgh	OP5	Robertson Property		No	8.00	0.00	8.00	0.00	0.00
B/FR/E/007	Fairney Business Park	Fraserburgh	BUS1	Aberdeenshire Council		Yes	1.18	0.00	1.18	1.18	0.00
B/FR/E/008	Phingask	Fraserburgh	OP3	Private Landowner	Marketability	No	16.50	16.50	0.00	0.00	0.00
B/FR/E/010	South Harbour Road Commercial Centre	Fraserburgh	CC1	Portside Quays Ltd		No	0.79	0.00	0.79	0.00	0.00
B/FR/E/012	Land within Kirkton Development	Fraserburgh	OP6	Private Landowner		No	4.00	0.00	4.00	0.00	0.00
B/IB/E/002	Inverboyndie Industrial Estate	Inverboyndie	BUS	Private Landowner		Yes	1.40	0.00	1.40	1.40	0.25
B/IB/E/003	Inverboyndie-Phase 2	Inverboyndie	BUS	Private Landowner		No	1.70	0.00	1.70	0.00	0.00
B/MC/E/001	Buchan Road - East	Macduff	BUS	Aberdeenshire Council		Yes	0.42	0.00	0.42	0.42	0.00
B/MC/E/003	Law of Doune and Tarlair Industrial Estate	Macduff	BUS	Private Landowner		Yes	1.30	0.00	1.30	1.30	0.00
B/MC/E/004	Buchan Road-West	Macduff	BUS	Private Landowner	Marketability	No	4.00	4.00	0.00	0.00	0.00
B/MC/E/005	Green Hills	Macduff	BUS	Private Landowner	Marketability	No	8.80	3.20	5.60	0.00	0.00
B/RH/E/001	South of Ritchie Road	Rosehearty	OP1	Private Landowner	Other	No	0.50	0.50	0.00	0.00	0.00
							50.58	25.02	25.56	4.57	0.25

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
Buchan											
U/AD/E/001	Land at Nether Backhill	Ardallie	OP1	Private Landowner	Land Use	No	0.30	0.30	0.00	0.00	0.00
U/AG/E/001	Land at North Braemo	Auchnagatt	OP1	Private Landowner	Marketability	No	0.50	0.50	0.00	0.00	0.00
U/CR/E/001	Land at Aulton Road	Cruden Bay	OP1	Claymore Homes		No	2.00	0.00	2.00	0.00	0.00
U/LA/E/001	Longside Airfield	Longside	OP1	Private Landowner	Other	No	81.50	79.00	2.50	0.00	0.00
U/LG/E/001	Land off Inverquhomery Road	Longside	OP2	Private Landowner		No	1.50	0.00	1.50	0.00	0.00
U/ML/E/001	Mintlaw Industrial Estate	Mintlaw	BUS2	Aberdeenshire Council		Yes	0.27	0.00	0.27	0.27	0.00
U/ML/E/003	Newlands Road	Mintlaw	BUS1	Claymore Homes		Yes	0.49	0.00	0.49	0.49	0.00
U/ML/E/005	Land at Nether Aden	Mintlaw	OP1	Bancon Homes		No	4.00	0.00	4.00	0.00	0.00
U/ML/E/006	Land North of Balring Road (Northwoods Business Park)	Mintlaw	OP6	Colaren Homes		No	7.90	0.00	7.90	0.00	0.00
U/PH/E/002	Balmoor Industrial Estate	Peterhead	BUS2	Aberdeenshire Council		Yes	2.04	0.00	2.04	2.04	0.00
U/PH/E/003	Dales Industrial Estate	Peterhead	BUS3	Aberdeenshire Council		Part	5.30	0.00	5.30	1.40	0.00
U/PH/E/005c	Land West of Damhead Way	Peterhead	OP6	Private Landowner	Physical	Part	8.50	6.20	2.30	0.00	0.00
U/PH/E/006	Land West of A90 (Energetica Industry Park)	Peterhead	BUS4/OP4	Scottish Enterprise	Infrastructure	No	11.60	11.60	0.00	0.00	0.00
U/PH/E/008	Burnside Business Park	Peterhead		Private Landowner		Yes	0.37	0.00	0.37	0.37	0.00
U/PH/E/009	Inverugie Meadows	Peterhead	OP1	Private Landowner	Other	No	4.00	4.00	0.00	0.00	0.00
U/PH/E/010	Land at Wellbank (South)	Peterhead	OP5	Score Group Ltd		Part	25.80	19.50	6.30	0.00	0.00
							156.07	121.10	34.97	4.57	0.00

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
Formartine											
F/BA/E/001	Land at Balmedie South	Balmedie	OP1	Aberdeenshire Council	Other	No	11.00	11.00	0.00	0.00	0.00
F/BD/E/001	Land at Blackdog	Blackdog	OP1	Private Landowner		No	4.00	0.00	4.00	0.00	0.00
F/CT/E/001	Cuminestown Industrial Estate	Cuminestown	BUS	Aberdeenshire Council	Marketability	No	0.54	0.54	0.00	0.00	0.00
F/EL/E/005	Ellon Commercial Park	Ellon	BUS	Private Landowner		Yes	1.19	0.00	1.19	1.19	0.00
F/EL/E/006	Balmacassie	Ellon	OP4	c/o Knight Frank	Other	No	23.00	23.00	0.00	0.00	0.00
F/EL/E/007	Cromleybank	Ellon	OP1	Scotia Homes	Other	No	2.00	2.00	0.00	0.00	0.00
F/FV/E/001	South of Westfield Farm	Foveran	OP1	Harper & Cochrane Ltd		No	2.00	0.00	2.00	0.00	0.00
F/NB/E/002	Newburgh Industrial Units	Newburgh	BUS	Private Landowner		No	1.90	0.00	1.90	0.00	0.00
F/NB/E/007	West of Airyhall View	Newburgh	OP1	Private Landowner		No	0.80	0.00	0.80	0.00	0.00
F/OM/E/003b	Oldmeldrum Business Park/ Meadows Industrial Estate	Oldmeldrum	BUS	Private Landowner		Yes	1.85	0.00	1.85	1.85	0.00
F/OM/E/006	West of Coutens	Oldmeldrum	OP6	Private Landowner	Other	No	3.20	3.20	0.00	0.00	0.00
F/PM/E/001	Land at Cloisterseat	Pitmedden	OP4	Private Landowner		No	0.80	0.00	0.80	0.00	0.00
F/PM/E/002	East Of Pitmedden House	Pitmedden	BUS	Norse Ltd		Part	1.70	0.00	1.70	0.00	0.00

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F/RO/E/002	Site West of Forgue Road	Rothienorman	OP2	Private Landowner	Marketability	No	1.20	0.00	1.20	0.00	0.00
F/TF/E/001	Markethill North	Turriff	BUS1	Aberdeenshire Council		Yes	0.20	0.00	0.20	0.20	0.00
F/TF/E/003	Morrison Motors	Turriff	BUS2	Private Landowner		No	1.00	0.00	1.00	0.00	0.00
F/TF/E/004	Markethill Industrial Estate	Turriff	BUS1	Unknown		No	2.00	0.00	2.00	0.00	0.00
F/TF/E/009	Adjacent to Broomhill Road / Markethill Industrial Estate	Turriff	OP3	Aberdeenshire Council	Other	No	3.10	3.10	0.00	0.00	0.00
F/TF/E/010	Adjacent to Wood of Delgaty	Turriff	OP1	Private Landowner	Other	No	10.00	10.00	0.00	0.00	0.00
F/TP/E/001	Site 1, Land East of Tippetty Industrial Estate	Tippetty	OP1	Private Landowner		No	0.76	0.00	0.76	0.00	0.00
F/TP/E/002	Land to the South of Tippetty Industrial Estate	Tippetty	OP2	Private Landowner		No	0.73	0.00	0.73	0.00	0.00
F/TV/E/003	The Grange	Tarves	OP1	Private Landowner		No	2.00	0.00	2.00	0.00	0.00
F/WP/E/001	West Pitmillan	West Pitmillan	OP1/BUS	Private Landowner		Part	5.10	0.00	5.10	2.00	0.00
							80.07	52.84	27.23	5.24	0.00

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
Garioch											
G/BB/E/004	Blackburn Ind Est / Westpark Business Pk	Blackburn	BUS	Private Landowner		Yes	0.17	0.00	0.17	0.17	0.00
G/IS/E/005	Insch Business Park, Muiryheadless	Insch	BUS	Aberdeenshire Council	Ownership	Part	4.43	0.00	4.43	2.13	0.00
G/IS/E/007	North of Insch Business Park	Insch	OP3	Aberdeenshire Council		No	4.00	0.00	4.00	0.00	0.00
G/IV/E/008	Highclere Business Park	Inverurie	BUS3	Private Landowner		Yes	0.60	0.00	0.60	0.60	0.00
G/IV/E/013	Crichie	Inverurie	OP6	Crichie Dev Ltd/Dandara	Infrastructure	No	19.00	19.00	0.00	0.00	0.00
G/IV/E/014	Adjacent to Axis Business Centre	Inverurie	OP9	ANM Group Ltd		No	1.50	0.00	1.50	0.00	0.00
G/IV/E/015	Thainstone	Inverurie	OP10	ANM Group Ltd		Yes	20.20	0.00	20.20	14.50	0.00
G/IV/E/016	Land Northeast of Thainstone Roundabout	Inverurie	OP14	Kilbride Resources Ltd		No	2.50	0.00	2.50	0.00	0.00
G/IV/E/017	Crichiebank Business Centre	Inverurie	BUS5	Private Landowner		Part	0.50	0.00	0.50	0.00	0.00
G/IV/E/018	Kirkwood Commercial Park, Thainstone	Inverurie	OP13/BUS7	Kirkwood Investments Ltd		Yes	6.10	0.00	6.10	1.70	0.00
G/IV/E/022	Land West of Conglass Cottages	Inverurie	OP16	Cala Homes	Other	No	2.00	2.00	0.00	0.00	0.00
G/KM/E/002	Quithie Road	Kemnay	BUS1	Private Landowner	Ownership	No	4.30	4.30	0.00	0.00	0.00

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
G/KM/E/005	Birley Bush Depot	Kemnay	OP2	Aberdeenshire Council	Ownership	Yes	1.00	1.00	0.00	0.00	0.00
G/KT/E/002b	South of Northern Road - A96	Kintore	OP7/BUS2	Private Landowner		No	2.50	0.00	2.50	0.00	0.00
G/KT/E/004	Midmill Business Park	Kintore	OP4	Kintore Consortium		Yes	3.50	0.00	3.50	3.50	0.00
G/KT/E/005	Kintore South	Kintore	OP3	c/o Halliday Fraser Munro	Other	No	6.00	6.00	0.00	0.00	0.00
G/MB/E/003	Land at Millbank Crossroads	Millbank	OP1	Cluny Estates	Infrastructure	No	0.20	0.00	0.20	0.00	0.00
G/NM/E/003	Redwood Cottage	Newmachar	OP3	Private Landowner	Other	No	8.90	8.90	0.00	0.00	0.00
G/OR/E/001	Barreldykes	Old Rayne	OP2	Ian Duncan Developments Ltd	Other	No	0.30	0.30	0.00	0.00	0.00
G/WH/E/007	Arnhall/Silvertrees Business Parks	Westhill	BUS	Chap Construction		Yes	0.53	0.00	0.53	0.53	0.00
G/WH/E/008	Arnhall Gateway	Westhill	BUS	Westhill Dev Co Ltd		Yes	3.52	0.00	3.52	3.52	0.00
							91.75	41.50	50.25	26.65	0.00

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
Kincardine and Mearns											
K/CH/E/001	Chapelton	Chapelton	OP1	Elsick Dev Co Ltd	Other	No	11.50	11.50	0.00	0.00	0.00
K/DL/E/001	Land East of Station Road	Drumlithie	OP1	Altair Construction & Development	Infrastructure, Land Use	No	0.50	0.50	0.00	0.00	0.00
K/EW/E/001	Edzell Business Base	Edzell Woods	OP2 / BUS	Carnegie Base Services	Marketability, Infrastructure	Part	45.10	42.40	2.70	2.70	0.00
K/FD/E/001	Land at Auchenblae Rd	Fordoun	BUS1	DLB (Scotland) Ltd		No	0.46	0.00	0.46	0.00	0.00
K/FD/E/002	Fordoun Aerodrome	Fordoun	BUS2	Private Landowner	Other	Part	10.10	4.10	6.00	0.00	0.00
K/GD/E/001	Linton Business Park	Gourdon	BUS	Aberdeenshire Council		Yes	1.40	0.00	1.40	1.40	0.00
K/GD/E/002	East of Linton Business Park	Gourdon	OP2	Private Landowner		No	3.00	0.00	3.00	0.00	0.00
K/LK/E/004	Mart Site West, Market St	Laurencekirk		Aberdeenshire Council		Yes	0.11	0.00	0.11	0.11	0.00
K/LK/E/005	Land East of Laurencekirk	Laurencekirk	OP8	Kirkwood Homes	Infrastructure	No	8.80	8.80	0.00	0.00	0.00
K/LK/E/006	Land South of High Street	Laurencekirk	OP6	Scotia Homes	Infrastructure	No	0.80	0.80	0.00	0.00	0.00
K/MK/E/001	Land to the West of Marykirk	Marykirk	OP1	Fotheringham Property Devs Ltd		No	0.50	0.00	0.50	0.00	0.00

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
K/MW/E/006	Cairnrobin	Marywell	BUS 1 and BUS 2	Private Landowner	Ownership, Infrastructure	Part	56.40	43.00	13.40	9.40	0.00
K/NH/E/001	West Monduff	Newtonhill	OP3	A&D Developments Ltd		No	5.20	0.00	5.20	0.00	0.00
K/NH/E/002	Land to West of A92	Newtonhill	OP2	Elsick Dev Co Ltd		No	9.68	0.00	9.68	0.00	0.00
K/PL/E/004	Badentoy Industrial Estate	Portlethen	BUS1	Badentoy Developments Ltd		Yes	6.00	0.00	6.00	0.40	0.00
K/PL/E/005	City South Business Park	Portlethen	BUS2	Dandara		Yes	7.70	0.00	7.70	7.70	3.00
K/PL/E/008	Land to NW of Badentoy	Portlethen	OP2	Dandara		No	5.20	0.00	5.20	0.00	0.00
K/PL/E/009	Fairview/ Fairview Central	Portlethen	OP3/ OP4	Private Landowner		No	7.50	0.00	7.50	0.00	0.00
K/SC/E/001	Roadside	St Cyrus	OP1	Private Landowner		No	1.15	0.00	1.15	0.00	0.00
K/ST/E/003	East Newtonleys	Stonehaven	BUS2	Bancon Developments		No	9.20	0.00	9.20	0.00	0.00
K/ST/E/004	East Newtonleys	Stonehaven	OP7	Bancon Developments		No	5.60	0.00	5.60	0.00	0.00
K/ST/E/005	Redcloak	Stonehaven	BUS3	Private Landowner		No	0.90	0.00	0.90	0.00	0.00
							196.80	111.10	85.70	21.71	3.00

Site Ref No	Location	Settlement	LDP Code	Main Developer	Constraints	Serviced	Established	Constrained	Marketable Total	(of which) Immediately Available	Under Construction
Marr											
M/AB/E/004	Land to west of Tarland Road	Aboyne	OP1	Private Landowner	Other	No	1.00	1.00	0.00	0.00	0.00
M/AF/E/002B	Land at Wellheads	Alford	OP2	Kirkwood Homes		No	0.76	0.00	0.76	0.00	0.00
M/AF/E/003	School Campus Site	Alford	OP1	Aberdeenshire Council		Yes	1.20	0.00	1.20	0.00	0.00
M/AF/E/004	East of Parkview	Alford	OP6	Private Landowner		No	1.00	0.00	1.00	0.00	0.00
M/BN/E/002	Hill Of Banchory	Banchory	BUS1	North Banchory Company		Yes	3.62	0.00	3.62	3.62	0.00
M/BN/E/004	Lochside of Leys East	Banchory	OP2	Private Landowner	Other	No	2.00	2.00	0.00	0.00	0.00
M/HT/E/002	Steven Road	Huntly	BUS2	RB Farquhar		Yes	2.00	0.00	2.00	2.00	0.00
M/HT/E/005	Mart	Huntly	BUS3	Private Landowner		No	4.00	0.00	4.00	0.00	0.00
M/HT/E/006	Land Adjacent to Linnorie	Huntly	OP3	Private Landowner		No	3.40	0.00	3.40	0.00	0.00
M/HT/E/008	The Ward	Huntly	OP5	c/o John Wink Design		No	1.20	0.00	1.20	0.00	0.00
M/KM/E/001	Land Opposite the School	Kennethmont	OP2	Private Landowner		No	0.70	0.00	0.70	0.00	0.00
M/KN/E/001	Land at Haugh Farm	Kincardine O'Neil	OP1	Private Landowner		No	0.25	0.00	0.25	0.00	0.00
M/LD/E/002	Lumsden	Lumsden	BUS	Private Landowner		No	0.27	0.00	0.27	0.00	0.00

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M/MF/E/001	Muir Of Fowlis	Muir of Fowlis	BUS	Private Landowner		No	0.30	0.00	0.30	0.00	0.00
M/RN/E/001	Rhynie Richmond Avenue East	Rhynie	BUS	Aberdeenshire Council		Yes	0.18	0.00	0.18	0.18	0.00
M/TP/E/001	Station Garage	Torphins	OP1	Private Landowner	Ownership	No	1.79	1.79	0.00	0.00	0.00
							23.67	4.79	18.88	5.80	0.00
TOTALS							598.94	356.35	242.59	68.54	3.25