

Moray Employment Land Audit

JUNE 2018



moray
council





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1. Introduction

1.1 Purpose of Audit

The Moray Employment Land Audit provides an overview of the supply and availability of employment land across the Moray Council area. The audit is an annual document and includes figures for take up and sites under construction.

The audit provides an evidence base for the monitoring and review of policies and proposals included within the Local Development Plan. In addition it can help to identify areas where further analysis and investigation is required. The baseline against which information is analysed is 1 January 2018.

The information contained in the Employment Land Audit will be of use to businesses, developers, and other organisations with an interest in employment land in Moray.

1.2 Methodology

The audit is prepared from information gathered by Council planning officers through monitoring of the development plan, planning approvals and individual inspections.

All employment sites in the existing local development plan have been recorded in a data base, unless the site has been built out in its entirety. In addition to sites allocated in the Moray Local Development Plan 2015 any windfall sites with planning consent for employment uses have been added to the database unless these are constrained to a single user (e.g. a distillery). It is noted that land with buildings that are vacant are not included in the audit nor are redeveloped sites.

Once sites have been identified officers undertake a review of planning applications and collect information such as ownership, proposed use etc. for each site. Officers also undertake site visits to monitor development activity. This information is then updated in the data base. The data is then analysed to produce the audit report.

2. Background

2.1 Scottish Planning Policy

Scottish Planning Policy (SPP) sets out the Scottish Governments policies in relation to economic development in Scotland. SPP requires Planning Authorities to allocate a range of sites for business, taking account of current market demand; location, size, quality, and infrastructure requirements; whether sites are serviceable within five years; the potential for a mix of uses; their accessibility to transport networks by walking, cycling and public transport and their integration with and access to existing transport networks. SPP states that business land audits should be undertaken regularly by local authorities to inform review of development plans. Business land audits should monitor the location, size, planning status, existing use, neighbouring land uses and any significant land use issues of sites within the existing business land supply.

2.2 Moray Local Development Plan

The Moray Local Development Plan 2015 sets out the employment land policies for the Planning Authority (excluding the Cairngorms National Park area). The Local Development Plan includes a suite of policies related to economic development (ED1 to ED9). These seek to safeguard employment land and support development of employment uses on designated sites. The policies also look at the types of uses that will be supported on designated sites. A more flexible approach to rural business proposals is provided for, with policy criteria used to ensure the most appropriate locations are supported in rural areas.

The Moray Local Development Plan 2015 designates land for employment uses within towns.

2.3 Moray Economic Strategy

The Moray Economic Strategy was published in October 2012 by the Moray Community Planning Partnership to provide a long term economic diversification strategy for Moray. Moray Council is working collaboratively with partner organisations to achieve the ambitions of the strategy.

This identifies that there is a shortage of serviced land ready for development to meet the needs of existing businesses and prospective inward investment. The Strategy estimated employment land requirements to 2025 are 25 hectares in Elgin, 10 hectares in Forres and 3-5 hectares at Buckie quayside and a further 5 hectares at March Road or elsewhere in Buckie. The Local Development Plan 2015 sought to address these targets by making appropriate designations.

The Moray Economic Strategy is due to be updated.

2.4 Moray 2026: A Plan for the Future

Moray 2026 sets out five priority areas for the Community Planning Partnership. Moray 2026 states that priority 1 is “a growing, diverse and sustainable economy” and that this is a “top priority at the heart of the future success of Moray. It covers business, employment, infrastructure, public services and the third sector developing sustainable communities.” Whilst employment land supply is not a statistical indicator within Moray 2026 land supply is key to achieving the outcomes including providing quality accommodation, increasing business start-ups, attracting inward investment, and growing employment opportunities in areas of key strength or emerging opportunities.

2.5 Demand for Employment Land

Moray Council Planning and Development, Moray Council Estates, Highlands and Islands Enterprise and Business Gateway, has met to consider employment land requirements. The demand for employment sites and buildings is considered to be greatest for smaller buildings with fewer businesses looking for larger sites. Demand for smaller sites and buildings are from small local businesses including builders, plumbers, garages, car valeting and plant and machinery supply. Demand for medium sized sites is from smaller businesses looking to grow and the demand for larger sites is generally from inward investors. There needs to be land and sites available at all levels of this pyramid to meet demand. Future demand was seen to come from small start-ups, renewables, digitally based business and decommissioning. There is also demand from existing business looking to relocate and expand. There was considered to be a need to identify opportunities for big inward investments of up to 40 ha/100 acres.

Sufficient land and buildings require to be available in Moray to facilitate wider economic development and the aims of the Moray Economic Strategy, including diversifying the economy.

A key industry for Moray is whisky distilling and this area has seen considerable expansion over recent years, including bonded warehousing. These businesses are long established and often in rural areas. The Local Development Plan currently looks to support such expansion through its policy on rural business which supports proposals where there is locational justification.

The Moray Council Industrial Portfolio Annual Report 2017 showed high levels of occupancy within the Moray Council Industrial portfolio with demand in most areas out stripping supply. Concern is expressed about the portfolio’s ability to fulfil the objective of maintaining an adequate supply of affordable premises, in particular a shortage of industrial development land and units. Servicing of a site at March Road SE is well advanced and due to be completed in March 2018.

A Property Needs Survey was undertaken by Moray Council Estates Services and HIE in 2016. There were 131 responses to the survey. The survey results reflect the settlement hierarchy within the Local Development Plan with the most demand in Elgin followed by Forres with lower levels of demand in Buckie, Keith and Speyside. The survey found that there was demand across all use classes including industrial, storage/warehouse and offices. Reflecting the comments above the demand for smaller sites was greatest with only a couple of respondents looking for sites of around 2 hectares. Key needs were identified as vehicle access, prominent visible location and yard space.

3. Employment Land Supply

Several categories of land supply are identified in the audit. Definitions for these are provided in section 5.

Detailed information of the established, constrained, effective and immediately available sites is provided in Appendix 2.

3.1 Established Employment Land Supply

The established employment land supply for Moray is shown in figure 1. There has been a decrease in the gross established supply by 2.66 ha since 2017; a significant proportion of this is due to re-measurement of site I6 now that Forres railway station has been completed but also some development being completed at March Road SE (I3) Buckie and Greshop (I1) Forres. This is a decrease of 2.02 ha to the net supply compared to 2017. The number of sites within the audit compared to 2017 is the same.

Figure 1 Established Employment Land Supply (2018) (Figures in hectares)

| Gross Established | Net Established | Number of Sites |
|-------------------|-----------------|-----------------|
| 206.83 | 154.31 | 32 |

The established employment land supply is broken down in figure 2 by town.

Figure 2 Established Employment Land Supply by town (2018) (Figures in hectares)

| Town | Gross Established | Net Established | Number of Sites |
|---------------|-------------------|-----------------|-----------------|
| Elgin | 71.36 | 52.03 | 5 |
| Forres | 57.31 | 39.29 | 6 |
| Buckie | 34.9 | 27.79 | 5 |
| Keith | 8.03 | 6.87 | 5 |
| Lossiemouth | 12.8 | 10.24 | 1 |
| Rest of Moray | 22.43 | 18.02 | 10 |

There has been a decrease in the established supply in Forres, Buckie and the Rest of Moray. In Forres the reduction is due to the re-measurement of site I6 to account for changes due to the completion of the new railway station and completion of a site at Greshop (I1) Forres. In Buckie there is a small reduction in the established supply due to the completion of a building at March Road (SE) I3. In the Rest of Moray a small site at Findhorn has been added to the established supply.

The established employment land supply has also been broken down by size of site to provide an indication of the range of size of sites available.

Figure 3 Established Employment Land Supply by site size (2018) (Figures in hectares)

| Site area | Net Established | Number of Sites |
|-----------|-----------------|-----------------|
| 0-1ha | 4.76 | 9 |
| 1-5ha | 30.76 | 13 |
| >5 ha | 118.79 | 10 |

3.2 Marketable/Effective Employment Land Supply

The marketable and effective employment land supply in 2018 is shown in figure 4. Overall the marketable/effective area has decreased by 0.35 hectares compared to 2017. There has been no change to the number of effective sites. The decrease is due to construction completed at Greshop Forres (11) and March Road (13) Buckie.

Figure 4 Marketable/Effective Employment Land Supply (2018)

| Marketable/Effective (Net figure in hectares) | Number of Sites |
|---|-----------------|
| 80.27 | 17 |

The marketable/effective employment land supply has been broken down by town in figure 5. The estimated employment land requirements to 2025 from the Moray Economic Strategy are included within the final column to allow comparison.

Figure 5 Marketable/Effective Employment Land Supply by town (2018)

| Town | Marketable/Effective (Net figure in hectares) | Number of Sites | Estimated requirements to 2025 ha (MES) |
|---------------|---|-----------------|---|
| Elgin | 35.66 | 4 | 25 |
| Forres | 13.59 | 2 | 10 |
| Buckie | 15.59 | 3 | 5 |
| Keith | 3.81 | 3 | n/a |
| Lossiemouth | 0 | 0 | n/a |
| Rest of Moray | 11.62 | 5 | n/a |

The level of effective supply in all towns is in line with the Moray Economic Strategy estimated requirements.

3.3 Immediately Available

The immediately available employment land supply in 2018 is shown in figure 6. The immediately available supply has decreased by 0.12 hectares and there has been a decrease in the number of sites. This is due to completion of a small site at Greshop (I1) at Forres for a garage and the wider site now being removed from the audit as there is very little developable land left available.

Figure 6 Immediately available Employment Land Supply (2018)

| Immediately Available (Net figure in hectares) | Number of Sites |
|--|-----------------|
| 17.95 | 5 |

3.4 Constrained

The established land supply that is subject to constraints is shown in figure 7. The constrained supply has decreased by 1.67 ha. This is due to removal of land now occupied by Forres train station.

Figure 7 Constrained Employment Land Supply (2018)

| Constrained Supply (Net figure in hectares) | Number of Sites |
|---|-----------------|
| 74.12 | 18 |

The constrained supply can be broken down into the type of constraints identified.

Figure 8 Constrained Employment Land Supply by constraint (2018) (Net figures in hectares)

Note some land may fall under more than one constraint.

| Constraint Type | Constrained Supply | Number of Sites |
|-----------------|--------------------|-----------------|
| Infrastructure | 28.36 | 8 |
| Ownership | 46.42 | 11 |
| Physical | 30.94 | 8 |

3.5 Take up and Construction

The number and area of proposals completed in the year to 1st January 2018 is shown in figure 9 below. This includes development at the Maltings at Buckie (I4), at Coularbank Lossiemouth and garage at Greshop (I1). This is slightly higher than last year (1.23ha in 2017).

Figure 9 Employment land completed/taken up in year to 1st January 2018

| Take up area (Gross figure in hectares) | Number of Sites |
|---|-----------------|
| 1.6 | 3 |

The number and area of proposals under construction on the base date of 1st January 2018 is shown in figure 10 below. The sites under construction include sites at Glen Moray Distillery Elgin, and at Waterford Forres. This is a reduction compared to previous years but this reflects a change to calculating this figure which previously included some of the activity set out below.

Figure 10 Employment land under construction at 1st January 2018

| Under Construction (Gross figure in hectares) | Number of Sites |
|---|-----------------|
| 2.31 | 3 |

It is noted that this does not represent all building activity, and only that on designated sites or windfall sites that are not restricted to a single user. Other notable areas of activity primarily relate to sites in the countryside and expansion of distilleries. For example new bonded warehouses at Glenfarclas near Marypark, a craft gin distillery at Glenrinn estate, Macallan distillery, and an office and workshop at Drumbain Farm Rothes. These examples account for over 20ha of activity. There is also a number of planning consents where construction had not started on 1st January 2018 including warehousing at Tamdhu Distillery, and Malcolmburn. In addition to these there has been redevelopment of existing buildings for example a brewery at Upper Hempbriggs Kinloss.

4. Conclusion

This is the sixth employment land audit in this format and comparison can be made to previous audits.

It is clear that the emphasis on employment land continues to be within the five main settlements with more limited supply in the “rest of Moray”. This reflects the strategy within the Moray Local Development Plan 2015. There continues to be a limited choice of serviced sites across all settlements and this is a particular issue in Elgin and Forres.

Around 48% (74.12 ha) of the Established Supply has some form of constraint that is likely to prevent the land being brought forward in the next five years. This is a comparable to 2017.

Only 22% (17.95ha) of the Marketable/Effective Supply is Immediately Available. This is a comparable to 2017. Historically the amount of immediately available land has been very limited. The amount of land Immediately Available is a very small proportion of the Established Supply and is spread across only five sites. The shortage of serviced land ready for development is identified in the Moray Economic Strategy and Moray Council Industrial Portfolio Annual Report as an issue.

Around 41% of sites (13 sites) in the Established Supply are in the medium size category (1-5ha) with the lowest number of sites (nine sites) in the lowest size category 0-1ha. The remaining 10 sites are in the higher category over 5ha. Given the limited number of sites across Moray this is a reasonable distribution of sizes.

In figure 11 on opposite page is a summary by settlement.

Figure 11 Settlement Summary

| | |
|-----------------------------|--|
| <p>Elgin</p> | <p>Small choice of marketable sites and land available is limited. Only immediately available land is at Chanonry (I2) and Linkwood East (I6). Much of the land at Chanonry is understood to be under offer and there is limited land available at Linkwood East due to consent for other uses including a furniture store and drive thru cafe. There are issues with delivery of higher quality business land and availability of serviced industrial land. Strong demand for industrial buildings. Access and services are currently being built/provided at Barmuckity (I7), this site remains critical to the supply in the Elgin area. Additional land must also be identified in the next Local Development Plan to meet the estimated requirements within the Moray Economic Strategy. Additional land is being considered at Burnside of Birnie and the potential for expansion at Barmuckity within the Main Issues Report.</p> |
| <p>Forres</p> | <p>Very small choice of marketable sites given settlement size and population, but reasonable areas available particularly for higher amenity uses. Proportion of immediately available land higher than other settlements but this is largely due to the large area available at the Enterprise Park (BP1). Waterford (I3) now has limited availability with the majority of the land/units now let. Consideration is being given to land at Waterford through the Main Issues Report. Strong demand, particularly for smaller units and need for serviced employment land to allow businesses to develop and relocate from smaller units.</p> |
| <p>Buckie</p> | <p>Small choice of marketable sites but reasonable areas available. Only one very small immediately available site at March Road. Opportunities at harbour. Limited new build activity since 2014 but demand for premises. Site servicing at March Road (SE) (I3) is almost complete and will provide a range of sites for development with further land available for future expansion.</p> |
| <p>Keith</p> | <p>Very small choice of marketable sites and limited area. Issues with providing readily accessible employment site. Demand for smaller units. Consideration being given to potential expansion areas through Main Issus Report.</p> |
| <p>Lossiemouth</p> | <p>Severely restricted choice of sites, only Sunbank OPP1 or windfall opportunities. The topography and ground conditions at Sunbank OPP1 are considered to constrain the site. Coulardbank is now largely complete, with only redevelopment opportunities available.</p> |
| <p>Rest of Moray</p> | <p>Limited choice of designated sites. In Aberlour, Lhanbryde, and Rothes there are only single sites available, some of which are constrained. In Mosstodloch sites are identified but these are generally to meet the expansion needs of existing businesses. Policies are in place that would consider Rural Business Proposals. Need for sites in Speyside for small local businesses. Land at Mosstodloch for employment uses is being considered through the Main Issues Report due to the constraints around Elgin.</p> |

5. Glossary

Constrained Employment Land Supply

This includes land for example, that has planning difficulties, land subject to ownership difficulties (e.g. multiple ownership/unwilling sellers), land 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).

Employment Land

This includes land for general industrial and business/office use, storage and distribution uses, business parks and specialist technology parks including research and development uses. This comprises Classes 4 (Business), 5 (General Industrial) and 6 (Storage or Distribution) of the 1997 Town and Country Planning (Use Classes) (Scotland) Order, but is not exclusive to these uses.

Established Employment Land Supply

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

Gross

This refers to the total area in (hectares) within the boundary of the site.

Immediately Available Land Supply

This is marketable/effective land that currently has planning permission, 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/Effective Land Supply

This is land that as well as meeting business requirements, has a secure planning status, can be serviced within 5 years, is accessible by walking, cycling and public transport as defined by SPP. Land that is subject to user restrictions or that is held as 'option land' for existing companies' own expansion cannot be considered to be marketable. Such land is not constrained.

Net

The total area of land excluding roads, landscaping etc. As the physical attributes of a site and surrounding land uses will determine the area suitable for development and the level of landscaping required the net area will vary. For sites that are partially complete, the net area given is the area that is actually available to be developed. For sites that are undeveloped the net area is estimated. This estimate is based on an assumption that on average, 20% of available land will be taken up with roads, landscaping etc. If relevant site information is available, this is taken into account in the estimate.

Take-Up

The take up figure includes all proposals where development has been completed within the particular year.

Under Construction

This is the area of land under construction at the base date. These sites are not yet complete. The area under construction area is not included within the land supply or built totals.

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| | | | |
|---------------------|-------------|--------------|----------|
| Reference: | M/AB/E/003 | Town: | ABERLOUR |
| Supply Type: | Constrained | LPR: | OPP1 |
| Location: | Mary Avenue | | |
| Grid Ref: | 327079 | 843178 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|-----|
| Gross Established: | 0.38 | Net Established: | 0.3 |
| Constrained: | 0.3 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0.16 | | |



| | | | |
|---------------------|-------------|--------------|--------|
| Reference: | M/BC/E/001 | Town: | BUCKIE |
| Supply Type: | Constrained | LPR: | BP1 |
| Location: | High Street | | |
| Grid Ref: | 342942 | 864437 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 6.17 | Net Established: | 4.93 |
| Constrained: | 4.93 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|-----------------|--------------|--------|
| Reference: | M/BC/E/002 | Town: | BUCKIE |
| Supply Type: | Effective | LPR: | I1 |
| Location: | March Road (NW) | | |
| Grid Ref: | 343528 | 865786 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|-----|
| Gross Established: | 0.4 | Net Established: | 0.4 |
| Constrained: | 0 | Immediately Available: | 0.4 |
| Effective: | 0.4 | Under Construction: | 0 |
| Built: | 8.25 | | |

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| | | | |
|---------------------|-----------------|--------------|--------|
| Reference: | M/BC/E/004 | Town: | BUCKIE |
| Supply Type: | Effective | LPR: | I3 |
| Location: | March Road (SE) | | |
| Grid Ref: | 343984 | 865510 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|-------|------------------------|-------|
| Gross Established: | 18.13 | Net Established: | 14.42 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 14.42 | Under Construction: | 0.44 |
| Built: | 2.7 | | |



| | | | |
|---------------------|-------------|--------------|--------|
| Reference: | M/BC/E/005 | Town: | BUCKIE |
| Supply Type: | Constrained | LPR: | I4 |
| Location: | Maltings | | |
| Grid Ref: | 343676 | 865357 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 9.43 | Net Established: | 7.27 |
| Constrained: | 7.27 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 5.96 | | |



| | | | |
|---------------------|------------------|--------------|--------|
| Reference: | M/BC/E/006 | Town: | BUCKIE |
| Supply Type: | Effective | LPR: | I6 |
| Location: | The Harbour Area | | |
| Grid Ref: | 343086 | 865957 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|-------|------------------------|------|
| Gross Established: | 0.77 | Net Established: | 0.77 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 0.77 | Under Construction: | 0 |
| Built: | 20.97 | | |

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| | | | |
|---------------------|------------|--------------|---------------|
| Reference: | M/CR/E/002 | Town: | CRAIGELLACHIE |
| Supply Type: | Effective | LPR: | |
| Location: | Bluehill | | |
| Grid Ref: | 329445 | | 843890 |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 2.24 | Net Established: | 1.79 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 1.79 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|------------------|--------------|--------|
| Reference: | M/EL/E/001 | Town: | ELGIN |
| Supply Type: | Part Constrained | LPR: | 17 |
| Location: | Barmuckity | | |
| Grid Ref: | 324719 | | 861725 |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 43.3 | Net Established: | 27.8 |
| Constrained: | 5.78 | Immediately Available: | 0 |
| Effective: | 22.1 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|-------------|--------------|--------|
| Reference: | M/EL/E/002 | Town: | ELGIN |
| Supply Type: | Constrained | LPR: | BP/OPP |
| Location: | Riverview | | |
| Grid Ref: | 319633 | | 862782 |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|-----|
| Gross Established: | 4.12 | Net Established: | 3.3 |
| Constrained: | 3.3 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |

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| | | | |
|---------------------|-------------------------------------|--------------|-------|
| Reference: | M/EL/E/004 | Town: | ELGIN |
| Supply Type: | Under Construction | LPR: | I12 |
| Location: | Glen Moray Distillery, Bruceland Ro | | |
| Grid Ref: | 319932 | 862424 | |

Constraint:

Owner Infrastructure Physical

Capacity (Ha):

| | | | |
|--------------------|-----|------------------------|-----|
| Gross Established: | 0 | Net Established: | 0 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 1.7 |
| Built: | 6.1 | | |



| | | | |
|---------------------|----------------------------|--------------|-------|
| Reference: | M/EL/E/008 | Town: | ELGIN |
| Supply Type: | Part Constrained | LPR: | I2 |
| Location: | Chanonry Industrial Estate | | |
| Grid Ref: | 323161 | 862960 | |

Constraint:

Owner Infrastructure Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 7.76 | Net Established: | 7.76 |
| Constrained: | 5.02 | Immediately Available: | 2.74 |
| Effective: | 2.74 | Under Construction: | 0 |
| Built: | 9.16 | | |



| | | | |
|---------------------|------------------|--------------|-------|
| Reference: | M/EL/E/012 | Town: | ELGIN |
| Supply Type: | Part Constrained | LPR: | I6 |
| Location: | Linkwood East | | |
| Grid Ref: | 323707 | 862498 | |

Constraint:

Owner Infrastructure Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 4.18 | Net Established: | 3.57 |
| Constrained: | 2.35 | Immediately Available: | 1.22 |
| Effective: | 1.22 | Under Construction: | 0 |
| Built: | 0.26 | | |

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| | | | |
|---------------------|------------|--------------|-------|
| Reference: | M/EL/E/016 | Town: | ELGIN |
| Supply Type: | Effective | LPR: | I8 |
| Location: | Newfield | | |
| Grid Ref: | 321907 | 864903 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|-----|------------------------|-----|
| Gross Established: | 12 | Net Established: | 9.6 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 9.6 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|-------------------|--------------|----------|
| Reference: | M/FH/E/001 | Town: | FINDHORN |
| Supply Type: | Effective | LPR: | |
| Location: | The Park Findhorn | | |
| Grid Ref: | 304958 | 863758 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 0.21 | Net Established: | 0.21 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 0.21 | Under Construction: | 0 |
| Built: | 0.13 | | |



| | | | |
|---------------------|------------------------|--------------|--------|
| Reference: | M/FR/E/001 | Town: | FORRES |
| Supply Type: | Effective | LPR: | BP1 |
| Location: | Forres Enterprise Park | | |
| Grid Ref: | 306378 | 859307 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|-------|------------------------|-------|
| Gross Established: | 23.34 | Net Established: | 13.48 |
| Constrained: | 0 | Immediately Available: | 13.48 |
| Effective: | 13.48 | Under Construction: | 0 |
| Built: | 17.46 | | |

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| | | | |
|---------------------|--------------------------|--------------|--------|
| Reference: | M/FR/E/004 | Town: | FORRES |
| Supply Type: | Effective | LPR: | I3 |
| Location: | Former Waterford Sawmill | | |
| Grid Ref: | 303095 | 859161 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 0.11 | Net Established: | 0.11 |
| Constrained: | 0 | Immediately Available: | 0.11 |
| Effective: | 0.11 | Under Construction: | 0.17 |
| Built: | 3.11 | | |



| | | | |
|---------------------|--------------------------|--------------|--------|
| Reference: | M/FR/E/007 | Town: | FORRES |
| Supply Type: | Constrained | LPR: | I6 |
| Location: | Railway Marshalling Yard | | |
| Grid Ref: | 303013 | 858979 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 0.88 | Net Established: | 0.88 |
| Constrained: | 0.88 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|------------------|--------------|--------|
| Reference: | M/FR/E/008 | Town: | FORRES |
| Supply Type: | Constrained | LPR: | I7 |
| Location: | Springfield West | | |
| Grid Ref: | 304276 | 859688 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 5.65 | Net Established: | 4.52 |
| Constrained: | 4.52 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 3.34 | | |

The Moray Council Employment Land Audit 2018



| | | | |
|---|------------------|------------------------|--------|
| Reference: | M/FR/E/010 | Town: | FORRES |
| Supply Type: | Constrained | LPR: | I8 |
| Location: | Springfield East | | |
| Grid Ref: | 304758 | 859929 | |
| Constraint: | | | |
| <input checked="" type="checkbox"/> Owner <input type="checkbox"/> Infrastructure <input type="checkbox"/> Physical | | | |
| Capacity (Ha): | | | |
| Gross Established: | 11.7 | Net Established: | 9.36 |
| Constrained: | 9.36 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---|----------------------------------|------------------------|--------|
| Reference: | M/FR/E/011 | Town: | FORRES |
| Supply Type: | Constrained | LPR: | BP2 |
| Location: | Enterprise Park Forres Extension | | |
| Grid Ref: | 306026 | 859725 | |
| Constraint: | | | |
| <input checked="" type="checkbox"/> Owner <input type="checkbox"/> Infrastructure <input type="checkbox"/> Physical | | | |
| Capacity (Ha): | | | |
| Gross Established: | 15.63 | Net Established: | 10.94 |
| Constrained: | 10.94 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|--|-------------|------------------------|-------|
| Reference: | M/KH/E/001 | Town: | KEITH |
| Supply Type: | Constrained | LPR: | BP1 |
| Location: | Mulben Road | | |
| Grid Ref: | 341628 | 850900 | |
| Constraint: | | | |
| <input type="checkbox"/> Owner <input checked="" type="checkbox"/> Infrastructure <input checked="" type="checkbox"/> Physical | | | |
| Capacity (Ha): | | | |
| Gross Established: | 1.52 | Net Established: | 1.22 |
| Constrained: | 1.22 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |

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| | | | |
|---------------------|---------------|--------------|-------|
| Reference: | M/KH/E/004 | Town: | KEITH |
| Supply Type: | Effective | LPR: | I4 |
| Location: | Bridge Street | | |
| Grid Ref: | 343609 | 850228 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 2.05 | Net Established: | 1.64 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 1.64 | Under Construction: | 0 |
| Built: | 1.72 | | |



| | | | |
|---------------------|-----------------|--------------|-------|
| Reference: | M/KH/E/005 | Town: | KEITH |
| Supply Type: | Constrained | LPR: | I7 |
| Location: | Isla Bank Mills | | |
| Grid Ref: | 342764 | 851453 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 1.84 | Net Established: | 1.84 |
| Constrained: | 1.84 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 4.03 | | |



| | | | |
|---------------------|----------------|--------------|-------|
| Reference: | M/KH/E/009 | Town: | KEITH |
| Supply Type: | Effective | LPR: | I3 |
| Location: | Westerton Road | | |
| Grid Ref: | 343643 | 850438 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 1.62 | Net Established: | 1.29 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 1.29 | Under Construction: | 0 |
| Built: | 0 | | |

The Moray Council Employment Land Audit 2018



| | | | |
|---------------------|--------------|--------------|-------|
| Reference: | M/KH/E/010 | Town: | KEITH |
| Supply Type: | Effective | LPR: | I2 |
| Location: | I2 Extension | | |
| Grid Ref: | 343584 | 850372 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 1 | Net Established: | 0.88 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 0.88 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|---------------|--------------|-----------|
| Reference: | M/LH/E/001 | Town: | LHANBRYDE |
| Supply Type: | Constrained | LPR: | OPP1 |
| Location: | Garmouth Road | | |
| Grid Ref: | 327839 | 861693 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 1.49 | Net Established: | 1.19 |
| Constrained: | 1.19 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0.91 | | |



| | | | |
|---------------------|--------------|--------------|-------------|
| Reference: | M/LS/E/007 | Town: | LOSSIEMOUTH |
| Supply Type: | Constrained | LPR: | OPP1 |
| Location: | Sunbank OPP1 | | |
| Grid Ref: | 323075 | 869644 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|-------|------------------------|-------|
| Gross Established: | 12.8 | Net Established: | 10.24 |
| Constrained: | 10.24 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |

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| | | | |
|---------------------|-------------|--------------|-------------|
| Reference: | M/MS/E/003 | Town: | MOSSTODLOCH |
| Supply Type: | Constrained | LPR: | I5 |
| Location: | Baxters | | |
| Grid Ref: | 333948 | 859705 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|-------|------------------------|------|
| Gross Established: | 2.22 | Net Established: | 1.78 |
| Constrained: | 1.78 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 12.05 | | |



| | | | |
|---------------------|-------------------|--------------|-------------|
| Reference: | M/MS/E/005 | Town: | MOSSTODLOCH |
| Supply Type: | Constrained | LPR: | I2 |
| Location: | North of Baxter's | | |
| Grid Ref: | 333613 | 860016 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 3.22 | Net Established: | 2.57 |
| Constrained: | 2.57 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|--------------|--------------|-------------|
| Reference: | M/MS/E/006 | Town: | MOSSTODLOCH |
| Supply Type: | Effective | LPR: | I3 |
| Location: | South of A96 | | |
| Grid Ref: | 333268 | 859627 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 9.9 | Net Established: | 7.92 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 7.92 | Under Construction: | 0 |
| Built: | 0 | | |

The Moray Council Employment Land Audit 2018



| | | | |
|---------------------|------------|--------------|--------|
| Reference: | M/RS/E/001 | Town: | ROTHES |
| Supply Type: | Effective | LPR: | I1 |
| Location: | Back Burn | | |
| Grid Ref: | 327876 | 849746 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 0.73 | Net Established: | 0.58 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 0.58 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|-------------|--------------|-----------|
| Reference: | M/TM/E/001 | Town: | THOMSHILL |
| Supply Type: | Constrained | LPR: | |
| Location: | Thornwood | | |
| Grid Ref: | 321977 | 856644 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 0.63 | Net Established: | 0.63 |
| Constrained: | 0.63 | Immediately Available: | 0 |
| Effective: | 0 | Under Construction: | 0 |
| Built: | 0 | | |



| | | | |
|---------------------|--------------------------|--------------|--------|
| Reference: | M/TV/E/001 | Town: | Troves |
| Supply Type: | Effective | LPR: | I1 |
| Location: | Troves Industrial Estate | | |
| Grid Ref: | 324974 | 324974 | |

Constraint:

Owner
 Infrastructure
 Physical

Capacity (Ha):

| | | | |
|--------------------|------|------------------------|------|
| Gross Established: | 1.41 | Net Established: | 1.12 |
| Constrained: | 0 | Immediately Available: | 0 |
| Effective: | 1.12 | Under Construction: | 0 |
| Built: | 0 | | |