Moray Employment Land Audit DRAFT

FEB 2019

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 2019.

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.

The Proposed Local Development Plan was published in January 2019. The Proposed Plan includes new designations for industrial land. Given the early stage of consultation on the Proposed Plan these sites will not be included in the audit until they have a firmer planning status.

2.3 Moray Economic Strategy

The Moray Economic Strategy 2019 -2029 was published in December 2018 by the Moray Economic Partnership. The 10 year strategy sets out the vision and a high-level series of actions required to deliver a successful and vibrant economy in Moray. One of the key measures is the level of immediately available employment land.

2.4 Moray 2026: A Plan for the Future

One of four priorities within the Moray Community Planning Partnership Local Outcomes Improvement Plan 2018 is an "A growing, diverse and sustainable economy." Whilst employment land supply is not a performance indicator within the Local Outcomes Improvements Plan land supply is important for achieving outcomes.

2.5 Demand for Employment Land

From discussions with Moray Council Estates and Highlands and Islands Enterprise perceptions of demand had not changed since 2018. Whilst Brexit was a concern it was noted that this did not appear to be impacting on the level of enquiries.

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 generally from small local businesses including builders, plumbers 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 to meet demand. The Moray Economic Strategy see's future demand within aerospace/space related businesses, life sciences, creative industries and digital, as well as the engineering sector. There is also demand from existing business looking to relocate and expand. A key industry for Moray is the food and drink industry. Whisky distilling 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.

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

The Moray Council Industrial Portfolio Annual Report 2017-2018 showed high levels of occupancy within the Moray Council Industrial portfolio with demand in most areas out stripping supply. The provision of further serviced sites and units is an issue and a number of projects are being considered.

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 an decrease in the gross established supply by 1.78 ha since 2018; this is due to several sites being built out and also windfall sites where planning consent has lapsed being removed from the audit. This is a decrease of 0.91 ha to the net supply compared to 2018. The number of sites within the audit compared to 2018 has reduced by two due to the removal of sites from the audit on completion and due to lapsed planning consent.

Figure 1 Established Employment Land Supply (2019) (Figures in hectares)

Gross Established	Net Established	Number of Sites
205.05	153.4	29

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

Figure 2 Established Employment Land Supply by town (2019) (Figures in hectares)

Town	Gross Established	Net Established	Number of Sites
Elgin	102.13	77.19	11
Elgin	*72.5*	*53.49*	*6*
Lossiemouth	*12.8*	*10.24*	*1*
Mosstodloch	*15.34*	*12.27*	*3*
Lhanbryde	*1.49*	*1.19*	*1*
Forres	57.2	39.18	5
Buckie	34.46	27.61	5
Keith	8.03	6.87	5
Speyside	3.23	2.55	3
Aberlour	*0.38*	*0.3*	*1*
Craigellachie	*2.24*	*1.79*	*1*
Rothes	*0.61*	*0.46*	*1*

There have been small decreases in the established supply in Forres, Buckie, Elgin and Speyside. These decreases are due to the completion or occupation of sites including at March Road SE/Rathven Industrial Estate (I3), Grampian Furnishers at Linkwood East (I6), yard space occupied at Waterford (I3), yard space occupied at Back Burn (I1) Rothes and completion of buildings at Findhorn. A windfall site at Thomshill has been removed as planning consent has lapsed.

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 (2019) (Figures in hectares)

Site area	Net Established	Number of Sites
0-1ha	3.69	6
ha	31.1	13
>5 ha	118.61	10

3.2 Marketable/Effective Employment Land Supply

The marketable and effective employment land supply in 2019 is shown in figure 4. Overall the marketable/effective area has decreased by 0.43 hectares compared to 2018. There has been a reduction of two in the number of effective sites. The decrease is due to construction completed at March Road SE (I3) Buckie, land under construction at Chanonry Elgin (I2), completion of a windfall site at Findhorn, occupation of yard space at Waterford (I3) and occupation of yard space at Rothes Back Burn (I1).

Figure 4 Marketable/Effective Employment Land Supply (2019)

Marketable/Effective (Net figure in hectares)	Number of Sites
79.84	15

The marketable/effective employment land supply has been broken down by market area in figure 5. Annual requirements established through historic demand studies, build out rates recorded in previous audits, and from discussions with HIE and Moray Council Estates have been used to provide the estimated number of years supply available. It is considered desirable to have a five year effective supply.

Figure 5 Marketable/Effective Employment Land Supply by market area (2019)

Market Area	Marketable/ Effective (Net figure in hectares)	Number of Sites	Estimated Annual Requirements	Available Supply in years
Elgin	44.89	6	2.8	16 years
Forres	13.48	1	0.8	16.8 years
Buckie	15.41	3	0.8	19 years
Keith	3.81	3	0.4	9.5 years
Speyside	2.25	2	0.4	5.6 years

The level of effective supply in Elgin, Buckie and Keith is currently sufficient. However, the choice of sites is limited across all areas. In Forres whilst there is a good supply of land this is all within Forres Enterprise Park where policy supports higher amenity uses. In Forres there is a severe shortage of general industrial land. There is a shortage of sites in Speyside and finding suitable sites has been an ongoing issue.

3.3 Immediately Available

The immediately available employment land supply in 2019 is shown in figure 6. The immediately available supply increased by 21.2 hectares. This is due to the servicing of sites at Barmuckity (I7) and at March Road SE (I3).

Figure 6 Immediately available Employment Land Supply (2019)

Immediately Available (Net figure in hectares)	Number of Sites
39.15	6

3.4 Constrained

The established land supply that is subject to constraints is shown in figure 7. The constrained supply has decreased by 1.58 ha. This is due to parts of the land at Linkwood East (I6) becoming effective and removal of a windfall site at Thomshill where consent has lapsed.

Figure 7 Constrained Employment Land Supply (2019)

Constrained Supply (Net figure in hectares)	Number of Sites
72.54	17

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

Figure 8 Constrained Employment Land Supply by constraint (2019) (Net figures in hectares)
Note some land may fall under more than one constraint.

Constraint Type	Constrained Supply	Number of Sites
Infrastructure	39.3	9
Ownership	43.65	9
Physical	28.8	7

3.5 Take up and Construction

The number and area of proposals completed in the year to 1st January 2019 is shown in figure 9 below. This includes completion or occupation of sites at March Road SE/Rathven Industrial Estate (I3), Grampian Furnishers at Linkwood East (I6), yard space occupied at Waterford (I3), yard space occupied at Back Burn (I1) Rothes) and completion of buildings at Findhorn. This is lower than last year (1.6ha in 2018).

Figure 9 Employment land completed/taken up in year to 1st January 2019

Take up area (Gross figure in hectares)	Number of Sites
1.29	5

The number and area of proposals under construction on the base date of 1st January 2019 is shown in figure 10 below. This is an increase in construction compared to 2.31ha in 2018. The sites under construction include sites at Glen Moary Distillery Elgin, at Waterford Forres (I3), land at Chanonry Elgin (I2), and land at Linkwood East Elgin (I6).

Figure 10 Employment land under construction at 1st January 2019

Under Construction (Gross figure in hectares)	Number of Sites
2.55	4

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 expansion proposals of existing businesses, sites in the countryside and expansion of distilleries. For example new bonded warehouses at Glenfarclas, Benromach, Tamdhu and Malcolmburn, and an office and workshop at Drumbain Farm Rothes.

4. Conclusion

The Employment Land Audit has been carried out in this format for several years allowing comparison to 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 other towns. 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 Forres and Speyside.

Around 47% (72.54 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 2018.

Only 49% (39.15.95ha) of the Marketable/Effective Supply is Immediately Available. This is significantly more than 2018 due due to the servicing of sites at Barmuckity (I7) and at March Road SE (I3). Historically the amount of immediately available land has been very limited. There continues to be a lack of choice of immediately available sites with only 6 sites being classed in this category. The availability of Immediately Available employment land is a Key Measure in the Moray Economic Strategy.

13 sites in the Established Supply are in the medium size category (1-5ha) with the lowest number of sites (six 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 below is a summary by market area.

Figure 11 Market Area Summary

Elgin (including Lossiemouth and Mosstodloch)	Provision of access and servicing is well advanced at Barmuckity (I7) bringing the first phase of the site into the immediately available supply. This site is critical to supply in the Elgin area. There continues to be smaller areas of 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 drive thru cafe. To the north of Elgin Newfield (I8) is being actively marketed increasing choice of sites across Elgin. Choice of sites is severely restricted in Lossiemouth, only Sunbank OPP1 or windfall opportunities are available. The topography and ground conditions at Sunbank OPP1 are considered to constrain the site. In Mosstodloch sites are identified but these are generally to meet the expansion needs of existing businesses. There are issues with delivery of higher quality business land. Strong demand for industrial buildings. Additional land must be identified in the next Local Development Plan to meet the estimated requirements within the Moray Economic Strategy. Additional land has been identified at Burnside of Birnie and Mosstodloch within the Proposed Local Development Plan.
Forres	Very small choice of marketable sites given settlement size and population, but reasonable areas for higher amenity uses available at the Enterprise Park. Proportion of immediately available land higher than other settlements largely due to the areas available at the Enterprise Park (BP1). Waterford (I3) now has limited availability with the majority of the land/units now let. Site BP2 to the north of the Enterprise Park is now impacted on by the preferred route of the A96 dualling. Strong demand, particularly for smaller units and need for serviced employment land to allow businesses to develop and relocate from smaller units. Additional industrial land must be identified through the next Local Development Plan. A site to the south of the Enterprise Park has been identified within the Proposed Local Development Plan. Land at Waterford is also identified however this is severely constrained by the preferred route of the A96 dualling.

Buckie	Small choice of marketable sites but reasonable areas available. Servicing of land at March Road SE (I3) to form Rathven Industrial Estate has increased levels of immediately available land. Opportunities at harbour. Given levels of land available the Proposed Local Development Plan identifies a reserve of industrial land on March Road that could be brought forward if need arose.
Keith	Very small choice of marketable sites and limited area. Issues with providing readily accessible employment sites. Demand for smaller units. Additional employment sites identified to the east of Westerton Road within the Proposed Local Development Plan. Opportunities for higher amenity employment uses promoted within a mixed use site to the south of Banff Road.
Speyside	Limited choice of designated sites. In Aberlour, Craigellachie, and Rothes there are only single sites available which are constrained. Need for sites in Speyside for small local businesses. Policies are in place that would consider Rural Business Proposals. Within the Proposed Local Development Plan a new site is identified at Greens of Rothes and at Speyview Aberlour 1ha of the housing site is identified for employment uses.



Forres

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.



Barmuckity

The Moray Council Employment Land Audit *2019*



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		



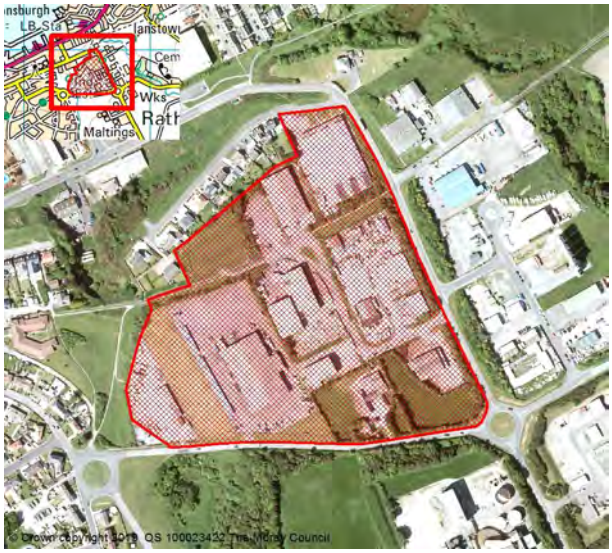
Reference:	M/BC/E/001	**Town:**	BUCKIE
Supply Type:	Constrained	**LPR:**	BP1
Location:	High Street		
Grid Ref:	342942		864437

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		

The Moray Council Employment Land Audit *2019*



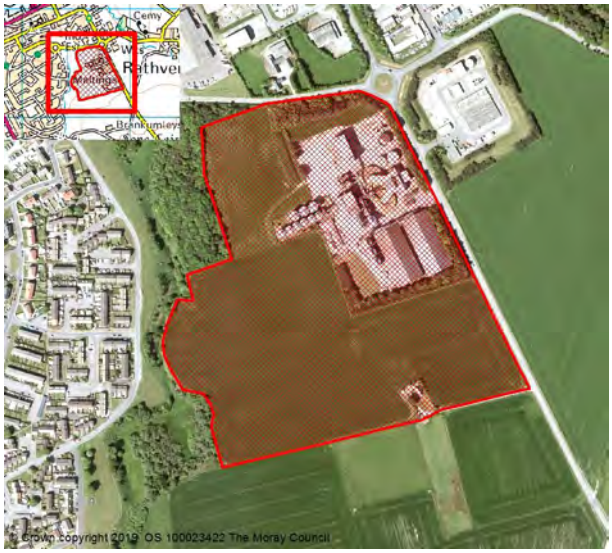
Reference:	M/BC/E/004	**Town:**	BUCKIE
Supply Type:	Effective	**LPR:**	I3
Location:	March Road (SE)		
Grid Ref:	343984	865510	

Constraint:

☐ Owner ☐ Infrastructure ☐ Physical

Capacity (Ha):

Gross Established:	17.69	Net Established:	14.24
Constrained:	0	Immediately Available:	7.95
Effective:	14.24	Under Construction:	0
Built:	3.14		



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	

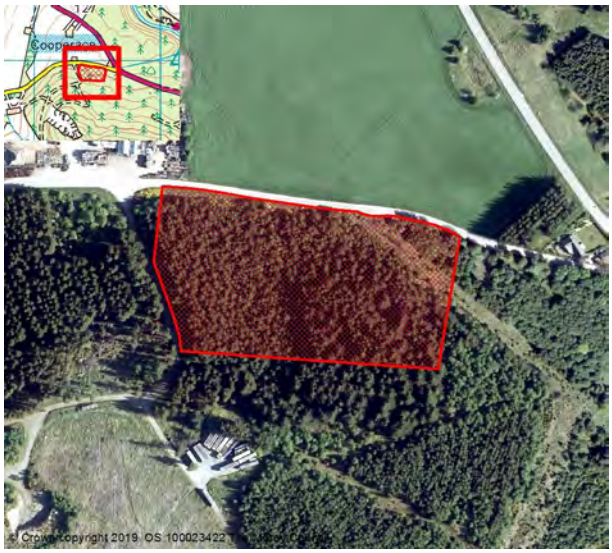
Constraint:

☐ 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		

The Moray Council Employment Land Audit *2019*



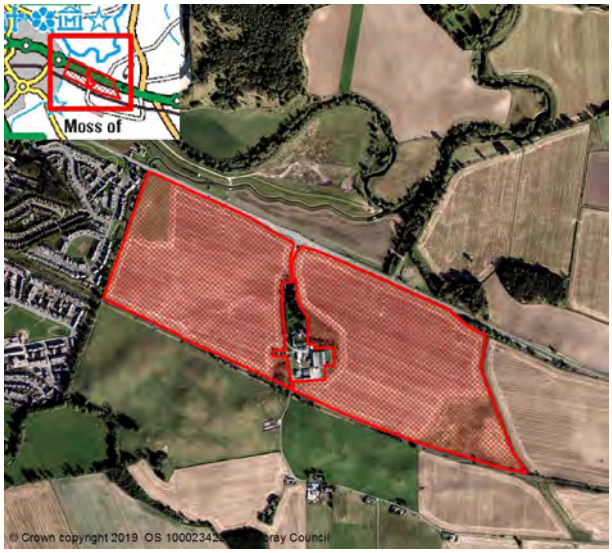
Reference:	M/CR/E/002	**Town:**	CRAIGELLACHIE
Supply Type:	Effective	**LPR:**	
Location:	Bluehill		
Grid Ref:	329445		843890

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:**	I7
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:	13.17
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		

The Moray Council Employment Land Audit *2019*



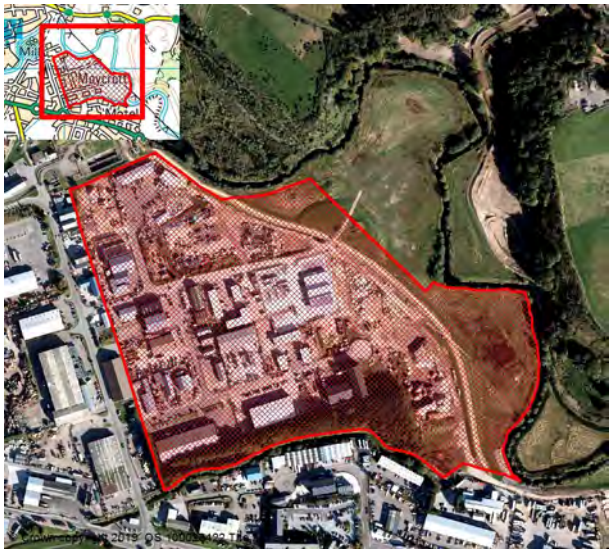
Reference:	M/EL/E/004	**Town:**	ELGIN
Supply Type:	Under Construction	**LPR:**	I12
Location:	Glen Moray Distillery, Bruceland Ro		
Grid Ref:	319932		862424

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:	2.34
Effective:	2.34	Under Construction:	0.4
Built:	9.16		



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

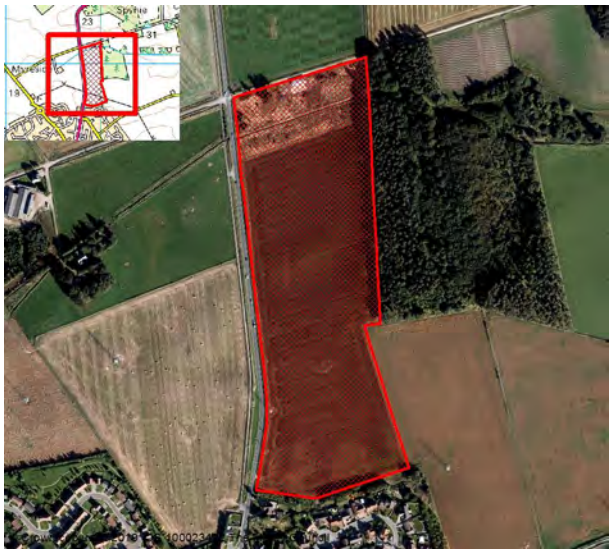
Constraint:

☑ Owner ☐ Infrastructure ☑ Physical

Capacity (Ha):

Gross Established:	3.91	Net Established:	3.91
Constrained:	1.4	Immediately Available:	1.81
Effective:	1.81	Under Construction:	0.28
Built:	0.67		

The Moray Council Employment Land Audit *2019*



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	Net Established:	0
Constrained:	0	Immediately Available:	0
Effective:	0	Under Construction:	0
Built:	0.34		



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

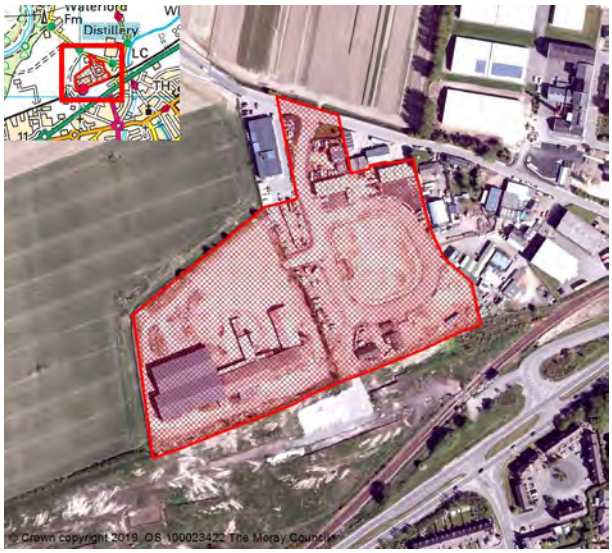
Constraint:

☐ 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		

The Moray Council Employment Land Audit *2019*



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	Net Established:	0
Constrained:	0	Immediately Available:	0
Effective:	0	Under Construction:	0.17
Built:	3.22		



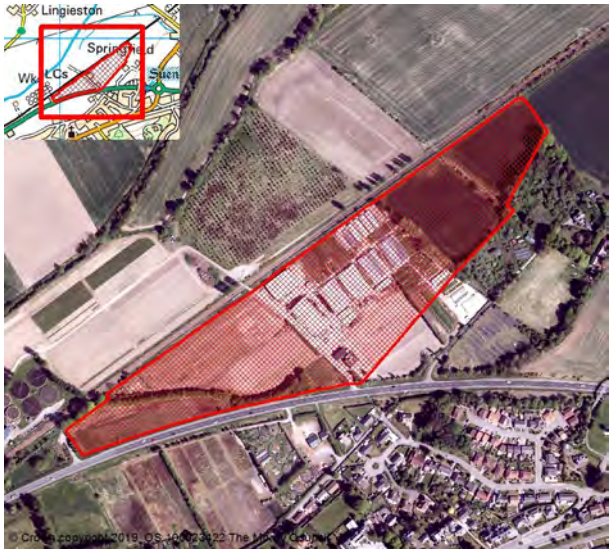
Reference:	M/FR/E/007	**Town:**	FORRES
Supply Type:	Constrained	**LPR:**	I6
Location:	Railway Marshalling Yard		
Grid Ref:	303013		858979

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

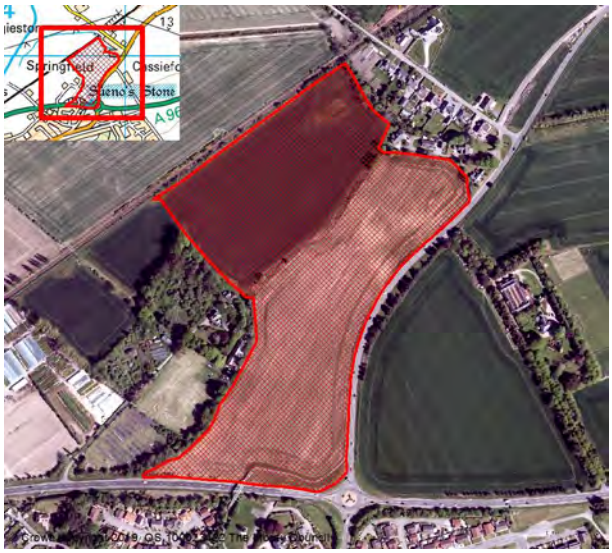
Constraint:

☑ 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 *2019*



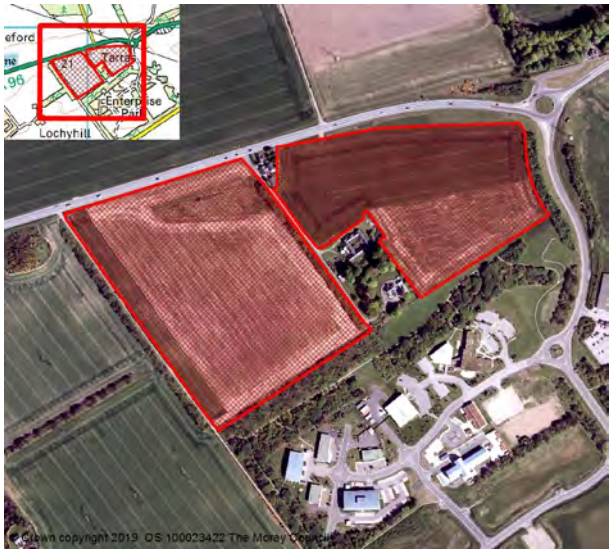
Reference:	M/FR/E/010	**Town:**	FORRES
Supply Type:	Constrained	**LPR:**	I8
Location:	Springfield East		
Grid Ref:	304758	859929	

Constraint:

☑ Owner ☐ Infrastructure ☐ Physical

Capacity (Ha):

Gross Established:	11.7	Net Established:	9.36
Constrained:	9.36	Immediately Available:	0
Effective:	0	Under Construction:	0
Built:	0		



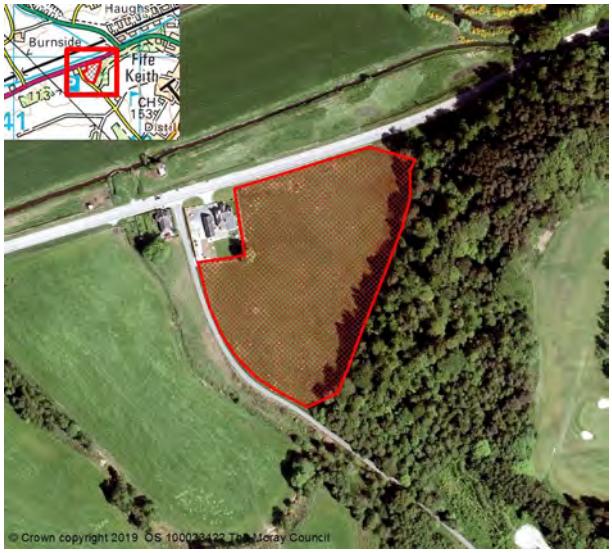
Reference:	M/FR/E/011	**Town:**	FORRES
Supply Type:	Constrained	**LPR:**	BP2
Location:	Enterprise Park Forres Extension		
Grid Ref:	306026	859725	

Constraint:

☑ Owner ☑ Infrastructure ☐ 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	

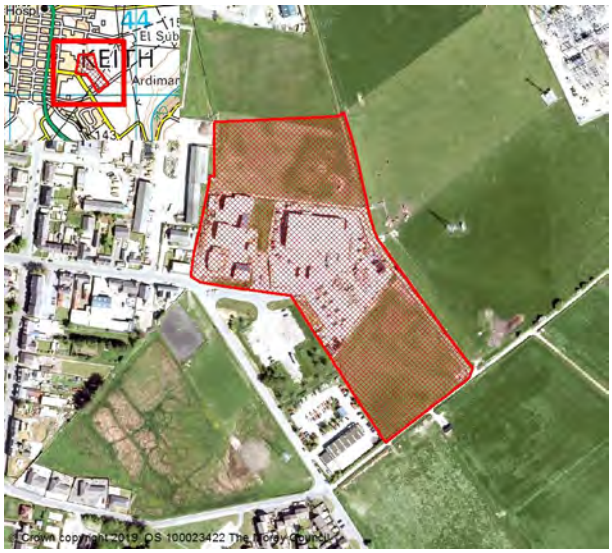
Constraint:

☐ Owner ☑ Infrastructure ☑ Physical

Capacity (Ha):

Gross Established:	1.52	Net Established:	1.22
Constrained:	1.22	Immediately Available:	0
Effective:	0	Under Construction:	0
Built:	0		

The Moray Council Employment Land Audit *2019*



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		



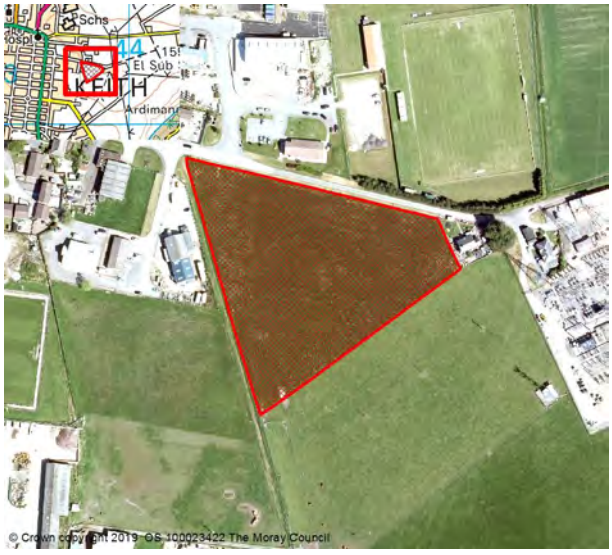
Reference:	M/KH/E/005	**Town:**	KEITH
Supply Type:	Constrained	**LPR:**	I7
Location:	Isla Bank Mills		
Grid Ref:	342764		851453

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 *2019*



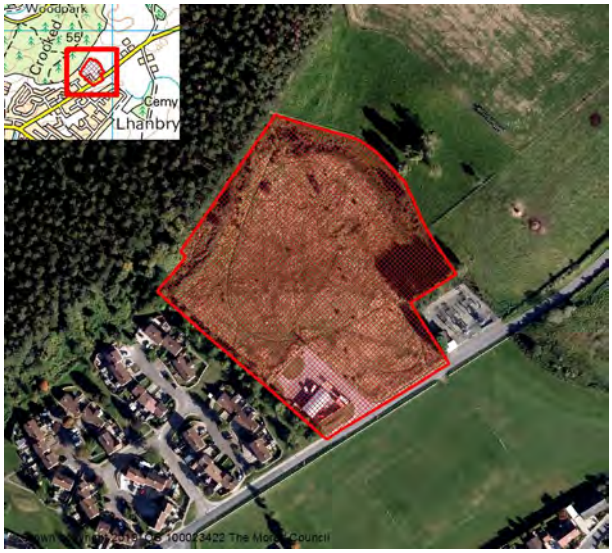
Reference:	M/KH/E/010	**Town:**	KEITH
Supply Type:	Effective	**LPR:**	I2
Location:	I2 Extension		
Grid Ref:	343584		850372

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

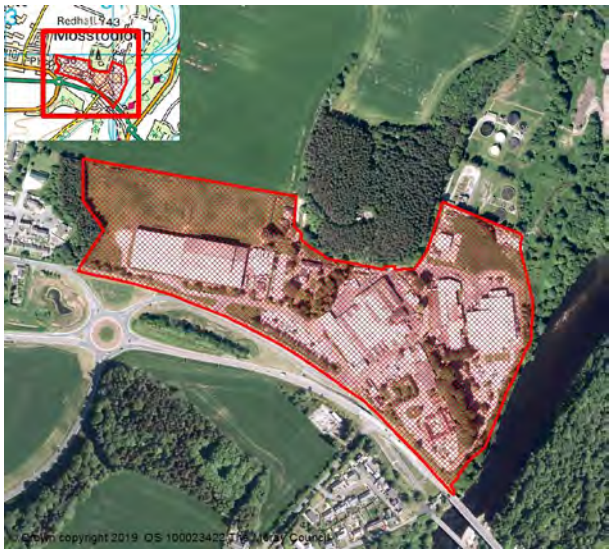
Constraint:

☐ 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		

The Moray Council Employment Land Audit *2019*



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

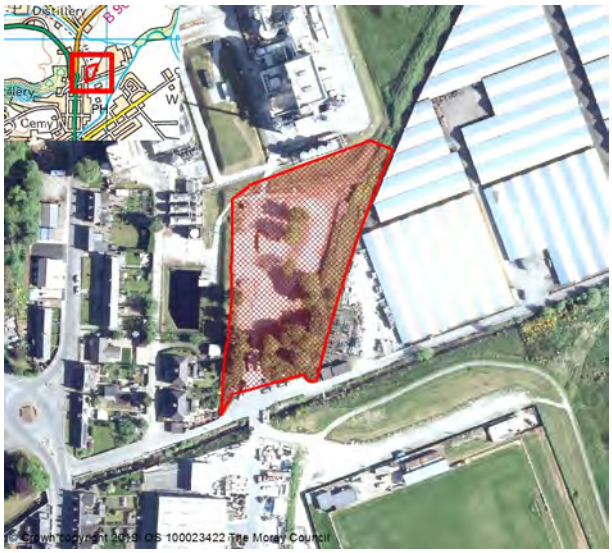
Constraint:

☐ 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 *2019*



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:	0.61	Net Established:	0.46
Constrained:	0	Immediately Available:	0
Effective:	0.46	Under Construction:	0
Built:	0.12		



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		