

APRIL 2022

Moray Employment Land Audit



moray
council





Forres Business Park

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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 Local Development Plan 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 2022.

The information contained in the Employment Land Audit will also 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 2020 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 2020 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 within the Primary and Development Policies sections. 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 2020 was adopted on 27 July 2020 and designates land for employment uses within towns. Sites from the 2020 plan were first included in the 2020 audit.

2.3 Moray Economic Strategy and Moray Economic Partnership (MEP)'s Economic Recovery Plan.

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.

An Economic Recovery Plan has been developed by the Moray Economic Partnership with actions to accelerate economic recovery from the impacts of the covid-19 pandemic. This includes provision of employment land in Forres and Speyside/East of Moray.

2.4 Moray 10 Year Plan - Local Outcome Improvement Plan (LOIP)

One of four priorities within the Moray Community Planning Partnership Local Outcomes Improvement Plan is “Developing a diverse, inclusive 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

Moray Council Estates and Highlands and Islands Enterprise (HIE) have advised that to date despite the Covid-19 pandemic and impacts of Brexit demand continues to hold up relatively well. Although there are maybe signs that the level of space for uses like call centres may reduce with continued homeworking and demand is increasing for technology and advanced engineering uses. There has also been notable developments of new private sector small business units that have recently been completed in Elgin with 14 units developed by Saltire at 17 Barmuckity and 18 by Excel at 12 Chanonry. What longer term impacts on demand there may be due to the pandemic and Brexit remain unclear.

The Moray Council Industrial Portfolio Annual Report 2020-2021 showed continued high levels of occupancy within the Moray Council Industrial portfolio with strong demand for smaller units. The provision of further serviced sites and units is an issue and a number of projects are being considered with a focus on Speyside where there are shortages and limited private sector interest in providing units on speculative basis. Moray Council is also working with HIE to advance opportunities in Forres to address deficiencies in supply.

HIE have responded to demand at Forres Enterprise Park by obtaining consent for 8 office pods adjacent to the Horizon building and for two small business units and are working to deliver these. A road extension has been built to open up part of the site for development. HIE are also working to secure opportunities within the aerospace industry and around a North Highland and Moray space cluster. HIE also continue to support Elgin Business Park.

The demand for employment sites and buildings is still 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 and support economic recovery.

3. Employment Land Supply

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

Detailed information on 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 1.22 ha since 2021. This decrease is due to development at 17 Barmuckity/Elgin Business Park, 12 Chanonry Industrial Estate (Elgin) and 11 Greshop (Forres). A site has also been removed at Aberlour as it has been occupied. This is balanced against the addition of land at the former shipyard at Buckie Harbour (15) which has now been cleared, land at 11 Troves where construction has stalled and at 13 Benromach Forres that had been excluded in error previously.

Figure 1 Established Employment Land Supply (2022) (Figures in hectares)

Gross Established	Net Established	Number of Sites
298.55	226.48	36

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



Figure 2 Established Employment Land Supply by town (2022) (Figures in hectares)

Town	Gross Established	Net Established	Number of Sites
Elgin Market Area	186.26	143.01	18
<i>Elgin</i>	<i>125.41</i>	<i>95.32</i>	<i>11</i>
<i>Lossiemouth</i>	<i>12.8</i>	<i>10.24</i>	<i>1</i>
<i>Mosstodloch</i>	<i>46.44</i>	<i>36.35</i>	<i>5</i>
<i>Troves</i>	<i>1.61</i>	<i>1.1</i>	<i>1</i>
Forres	55.48	34.77	4
Buckie Market Area	43.96	37.46	6
<i>Buckie</i>	<i>43.15</i>	<i>36.81</i>	<i>5</i>
<i>Cullen</i>	<i>0.81</i>	<i>0.65</i>	<i>1</i>
Keith	11.1	9.64	6
Speyside Market Area	1.75	1.6	2
<i>Aberlour</i>	<i>1</i>	<i>1</i>	<i>1</i>
<i>Roths</i>	<i>0.75</i>	<i>0.6</i>	<i>1</i>

ELGIN MARKET AREA - There has been a decrease in the established supply within the Elgin Market Area compared to 2021 (4.5ha to the gross supply and 1.3ha to the net supply). This is as a result of development at I7 Barmuckity/Elgin Business Park, and I2 Chanorny. Land at Troves has been added back into the established supply after being classed as under construction for a number of years.

FORRES MARKET AREA - There has been an increase in the established supply in Forres compared to 2021 due undeveloped land at I3 Benromach being excluded from the established supply in error. This increase is 2.7ha to the gross supply and 1.69ha to the net supply.

BUCKIE MARKET AREA - There is a small increase (1ha) to the gross established and net area at Buckie compared to 2021 as result of including the vacant shipyard site at I5 Harbour where this has now been cleared of vacant and derelict buildings.

KEITH MARKET AREA - There has been no change to the established supply in the Keith Market Areas.

SPEYSIDE MARKET AREA - There is a small decrease (0.4ha) in area compared to 2021 with the removal of the OPP1 site at Mary Avenue which is occupied and not available for development.

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 (2022) (Figures in hectares)

Site area	Net Established	Number of Sites
0 - 1ha	3.75	6
1 - 5 ha	28.71	15
>5 ha	194.91	15

The land supply is broken down by the type of employment uses that are considered suitable on the site. The greatest proportion of land is suitable for Class 5 General Industrial uses (and also Class 4 Business and Class 6 Storage and Distribution). On some designations the whole area may be capable of accommodating higher amenity or a greater mix of uses but on some designations distinct areas within a site are identified. These tend to be uses within Class 4 that require a higher amenity setting or due to the location close to residential development general industrial uses would not be suitable. On some larger sites a greater mix of uses (for example Class 1 Shops where ancillary to main use, Class 4 Business, Class 5 General Industrial, Class 6 Storage or Distribution, Class 7 Hotel and Hostels and Use Class 11 Assembly and Leisure) are identified on part of the site to help support delivery of the site as a whole. A breakdown of the type of sites is shown in figures 4 and 5 below. It is noted that some sites will be counted in both the General Industrial and High Amenity figures as on larger sites part of the site may be identified for a greater mix of uses.

Figure 4: Net supply by type (2022). Figures in hectares

	Net Area	Number of Sites
General Industrial	162.37	29
High Amenity	58.32	12

Figure 5: Net supply by Market Area and type (2022). Figures in hectares

Market Area	General Industrial	Number of Sites	High Amenity	Number of Sites
Elgin	102.98	16	36.44	6
<i>Elgin</i>	<i>60.41</i>	<i>9</i>	<i>31.32</i>	<i>5</i>
<i>Lossiemouth</i>	<i>5.12</i>	<i>1</i>	<i>5.12</i>	<i>1</i>
<i>Mosstodloch</i>	<i>36.35</i>	<i>5</i>		
<i>Troves</i>	<i>1.1</i>	<i>1</i>		
Forres	22.3	4	10.27	1
Buckie	30.44	4	7.02	2
<i>Buckie</i>	<i>30.44</i>	<i>4</i>	<i>6.37</i>	<i>1</i>
<i>Cullen</i>			<i>0.65</i>	<i>1</i>
Keith	6.05	4	3.59	2
Speyside	0.6	1	1	1
<i>Aberlour</i>			<i>1</i>	<i>1</i>
<i>Roths</i>	<i>0.6</i>	<i>1</i>		

3.2 Marketable/Effective Employment Land Supply

The marketable and effective employment land supply in 2022 is shown in figure 6. Overall the marketable/effective area has decreased by 1.31 hectares compared to 2021. The number of effective sites has remained the same. The decrease is due to construction activity at I7 Barmuckity/Elgin Business Park and I2 Chanonry at Elgin. This is balanced against land at I1 Troves previously classed as under construction being brought into the effective supply due to stalled construction.

Figure 6: Marketable/Effective Employment Land Supply (2022)

Marketable/Effective (Net figure in hectares)	Number of Sites
100.37	21

The marketable/effective employment land supply has been broken down by market area in figure 7. 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 noted that previously it was desirable to have a five year effective land supply at all times and therefore previous Local Development Plans sought to designate a minimum of 10 year land supply. However, to ensure a generous supply, increase choice and the prospect of a 10 year replacement period for future Local Development Plans, the Moray Local Development Plan 2020 sought to designate a minimum of 15 years supply.

Figure 7 Marketable/Effective Employment Land Supply by market area (2022)

Market Area	Marketable/ Effective (Net figure in hectares)	Number of Sites	Estimated Annual Requirements	Available Supply in years
Elgin	58.11	10	2.8	20 years
Forres	13.02	1	0.8	16 years
Buckie	22.34	4	0.8	28 years
Keith	5.3	4	0.4	13 years
Speyside	1.6	2	0.4	4 years

The level of effective supply in Elgin, and Buckie is currently good. However, the choice of sites is limited across all market areas. It is noted that within in Elgin there are only small areas now available within I6 Linkwood East and I2 Chanorny. The level of interest and recent planning applications at I7 Barmuckity also suggests availability will be limited in the future. In Forres whilst there is a good supply of land this is all at BP1 Forres Enterprise Park. Whilst Keith has less than 15 years supply there is a LONG allocation that could be brought forward, however there is a limited choice of sites in Keith with these primarily being in the Westerton Road area. There is a shortage of sites in Speyside and finding suitable sites has been an ongoing issue. Removal of a site in the Examination of the 2020 Local Development Plan means there will be a reliance on windfall proposals within this area.

The effective land supply is broken down by the type of employment uses that are considered suitable on the site. The greatest proportion of land is suitable for Class 5 General Industrial uses (and also Class 4 Business and Class 6 Storage or Distribution). As set out above some sites are wholly or have areas that would be capable of accommodating higher amenity uses or a greater mix of uses. These tend to be uses within Class 4 that require a higher amenity setting or due to the location of the site close to residential development general industrial uses would not be suitable. On some larger sites areas that could accommodate a greater mix of uses (for example Class 1 Shops where ancillary to main use, Class 4 Business, Class 5 General Industrial, Class 6 Storage or Distribution, Class 7 Hotel and Hostels and Use Class 11 Assembly and Leisure) are identified to help support delivery of the site as a whole.

A breakdown of the type of sites is shown in figures 8 and 9 below. It is noted that some sites will be counted in both the General Industrial and High Amenity figures as on larger sites part of the site may be identified for a greater mix of uses.

Figure 8: Effective area by type (2022) Figures in hectares.

	Effective Area	Number of Sites
General Industrial	63.56	16
High Amenity	36.82	8

Figure 9: Effective area by Market Area and type (2022). Figures in hectares.

Market Area	General Industrial	Number of Sites	High Amenity	Number of Sites
Elgin	41.34	9	16.78	3
<i>Elgin</i>	27.44	7	16.78	3
<i>Mosstodloch</i>	12.8	1		
<i>Troves</i>	1.1	1		
Forres	2.75	1	10.27	1
Buckie	15.32	2	7.02	2
<i>Buckie</i>	15.32	2	6.37	1
<i>Cullen</i>			0.65	1
Keith	3.55	3	1.75	1
Speyside	0.6	1	1	1
<i>Aberlour</i>			1	1
<i>Roths</i>	0.6	1		

The Elgin and Buckie market areas have relatively healthy supplies of general industrial land providing the equivalent of 15 years supply. In Forres there is a significant shortage of general industrial land and this requires to be urgently addressed. Only a small portion of the BP1 Forres Enterprise Park is able to accommodate general industrial uses. In Keith the general industrial supply is more limited however there is a LONG allocation that could be drawn down if there is shortage. There is, and has historically been, a significant shortage of general industrial land in Speyside. This means there is a reliance on windfall proposals to accommodate demand.

3.3 Immediately Available

The immediately available employment land supply in 2022 is shown in figure 10. The immediately available supply decreased by 1.49ha compared to 2021. The decrease is due to construction activity at I7 Barmuckity/Elgin Business Park and I2 Chanonry. As noted above take up at I7 Elgin Business Park/Barmuckity has been very good and therefore it is anticipated that the level of immediately available land in the Elgin Market Area will reduce significantly over the next few years. Bringing forward and servicing new sites will be critical to maintaining supplies.

Figure 10: Immediately available Employment Land Supply (2022)

Immediately Available (Net figure in hectares)	Number of Sites
33.85	6

3.4 LONG

The Moray Local Development Plan 2020 included LONG employment sites for the first time. The LONG supply is set out in figure 11 below. These sites set out the direction of growth and assist in forward planning. LONG sites are designated at LONG3 Burnside of Birnie Elgin, LONG MU1 South of the A96, LONG 2 West of Mosstodloch, LONG 2 Westerton Road Keith and LONG2 March Road.

Figure 11: LONG sites 2022

LONG (Net figure in hectares)	Number of Sites
48.06	5

3.5 Constrained

The established land supply that is subject to constraints is shown in figure 12. The constrained supply has increased by 2.8ha compared to 2021. This is due to the addition of land at I5 Harbour Buckie at the former shipyard and correcting an error where constrained land at I3 Benromach Forres was not included in the audit. The addition of this land has been balanced against the development of land at I1 Greshop and the removal of OPP1 Mary Avenue at Aberlour from the audit.

Figure 12: Constrained Employment Land Supply (2022)

Constrained Supply (Net figure in hectares)	Number of Sites
78.03	16

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

Figure 13: Constrained Employment Land Supply by constraint (2022) (Net figures in hectares) Note some land may fall under more than one constraint.

Constraint Type	Constrained Supply	Number of Sites
Infrastructure	45.75	8
Ownership	14.15	4
Physical	44.23	11

3.6 Take up and Construction

The number and area of proposals completed in the year to 1st January 2022 is shown in figure 14 below. This includes completion or occupation of sites at I7 Barmuckity, I2 Chanonry, I6 Linkwood East and OPP4 Ashgrove in Elgin and I1 Greshop in Forres. A new road has also been completed at BP1 Forres Enterprise Park. This is a similar level of take up and construction as recorded in 2021 when 4.68ha was recorded but is across a greater range of sites (6 compared to 4 in 2021).

Figure 14 Employment land completed/taken up in year to 1st January 2022

Take up area (Gross figure in hectares)	Number of Sites
4.74ha	6

The number and area of proposals under construction on the base date of 1st January 2022 is shown in figure 15 below. This is a decrease in construction activity compared to 2021 of 3ha and 2.22ha compared to 2020. It is noted however that the level is higher than audits completed in 2015-2019 which ranged from 2.31ha to 5.25ha. The sites under construction include sites at I7 Barmuckity/Elgin Business Park, development in Keith at I3 Westerton Road East (including a small part of I11) and the initiation of development at I3 Benromach.

Figure 15: Employment land under construction at 1st January 2022

Under Construction (<i>Gross figure in hectares</i>)	Number of Sites
6	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.

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 main settlements of Elgin, Forres, Buckie and Keith. However, Mosstodloch is also the focus of a large proportion of the supply in the Elgin Market Area. The shortage of general industrial land in the Forres Market Area is a significant issue that requires to be addressed. There is a significant shortage of land and sites within the Speyside Market Areas which means there is a reliance on windfall sites to accommodate demand. There continues to be a limited choice of serviced sites/immediately available sites across all settlements 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.

In figure 16 below is a summary by market area.

Figure 16 Market Area Summary

<p>Elgin (including Lossiemouth and Mosstodloch)</p>	<p>Development at Barmuckity/Elgin Business Park (I7) is progressing with several plots completed and others under construction. There continues to be significant interest in the remaining plots, including some of the larger plots. The 14 starter units at the back of the site are now complete with strong interest in these. The high levels of take up at Elgin Business Park/Barmuckity (I7) suggest the level of Immediately Available land will reduce significantly over the next few years and therefore bringing new sites forward and servicing these is critical to maintaining a supply of serviced sites.</p> <p>At Chanonry (I2) and Linkwood East (I6) there continues to small areas of immediately available land but this has reduced to only a couple of small plots on each site. At Chanonry there is a private development of 18 starter units that is currently being marketed. At OPP4 Ashgrove a storage and distribution building with ancillary trade counter has been built and consent is in place for an additional general industrial/storage or distribution building here.</p> <p>Bringing forward other sites within Elgin will be critical to maintaining a choice of immediately available sites. To the north of Elgin Newfield (I8) is being actively marketed increasing choice of sites across Elgin. Land has been identified at Burnside of Birnie (I16/LONG3) to meet future demand.</p> <p>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.</p> <p>In Mosstodloch additional land is identified at I3 West of Mosstodloch and there are discussions ongoing with the landowner regarding the site.</p> <p>There are issues with delivery of higher quality business land. Strong demand continues for industrial buildings.</p>
<p>Forres</p>	<p>Very small choice of marketable/effective sites given settlement size and population, but reasonable areas available at the BP1 Enterprise Park. I4 Easter Newforres is understood to have high infrastructure costs that will likely require public sector funding support to make this site effective.</p> <p>There is continued demand for small offices at Horizon Scotland at BP1 Enterprise Park. Consent has also been granted for two small business units in the north west of BP1. The road extension has opened up an area for development to the south east of BP1.</p>

<p>Forres</p>	<p>The remaining land at Waterford (I2) is now constrained due to restricted access.</p> <p>Strong demand, particularly for smaller units and need for serviced employment land to allow businesses to develop and relocate from smaller units.</p> <p>The Economic Recovery Plan includes an action to progress the development of employment land or industrial units in Forres.</p>
<p>Buckie</p>	<p>Small choice of marketable sites but reasonable areas available. Significant area immediately available at I3 Rathven Industrial Estate. Redevelopment opportunities at harbour. Small site available at Cullen.</p> <p>The Moray Local Development Plan identifies a reserve of industrial land at March Road (LONG2) that could be brought forward if need arose.</p>
<p>Keith</p>	<p>Very small choice of marketable sites focussed around the Westerton Road area. Issues with providing readily accessible employment sites. Demand for smaller units but greatest demand is currently for battery storage and development linked to Blackhillock. Opportunities for higher amenity employment uses promoted within a mixed use site to the south of Banff Road (MU).</p>
<p>Speyside</p>	<p>Severely limited choice of designated sites. There is a need for sites for small local businesses in Speyside. The Moray Local Development Plan 2020 identifies a site at Speyview (R2) where 1ha of the housing site is identified for employment uses. The removal of a site during the Examination of the Moray Local Development Plan 2020 means there is a reliance on windfall proposals supported through policy.</p> <p>The Economic Recovery Plan includes an action to progress the development of employment land or industrial units in Speyside.</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

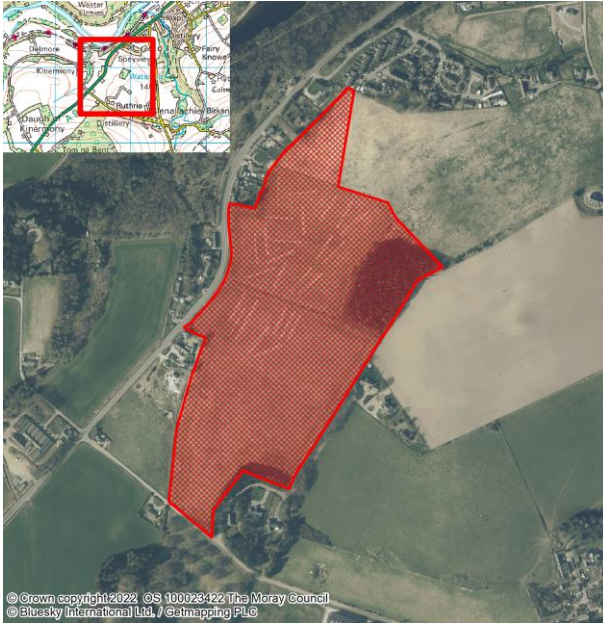
The take up figure includes all proposals where development has been completed within the particular year.

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.

The Moray Council Employment Land Audit 2022

Reference:	M/AB/E/005	Town:	ABERLOUR
Supply Type:	Effective	LPR:	20/R2
Location:	Speyview		
Grid Ref:	325631	841602	



Established Supply (Ha):

Gross Established:	1	Net Established:	1
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Effective Supply (Ha):

Effective:	1	General Industrial:	0
Immediately Available:	0	High Amenity:	1

LONG Supply (Ha):

LONG:	0
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Constrained

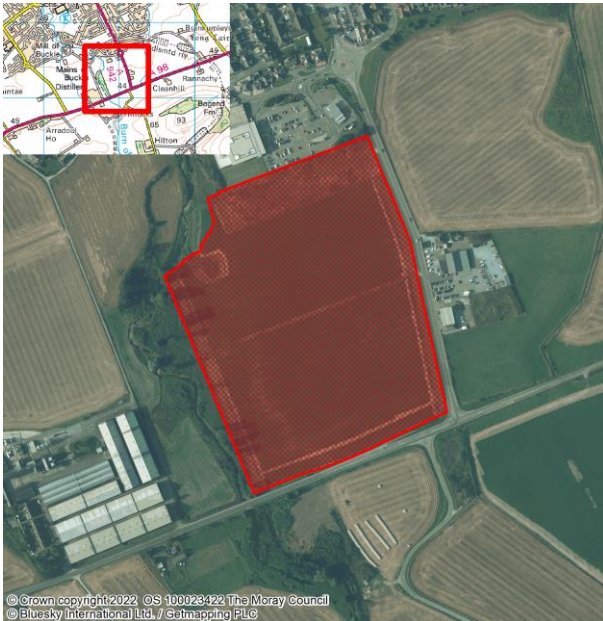
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/BC/E/001	Town:	BUCKIE
Supply Type:	Effective	LPR:	20/MU
Location:	High Street (W)		
Grid Ref:	342942	864437	



Established Supply (Ha):

Gross Established:	6.37	Net Established:	6.37
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Effective Supply (Ha):

Effective:	6.37	General Industrial:	0
Immediately Available:	0	High Amenity:	6.37

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

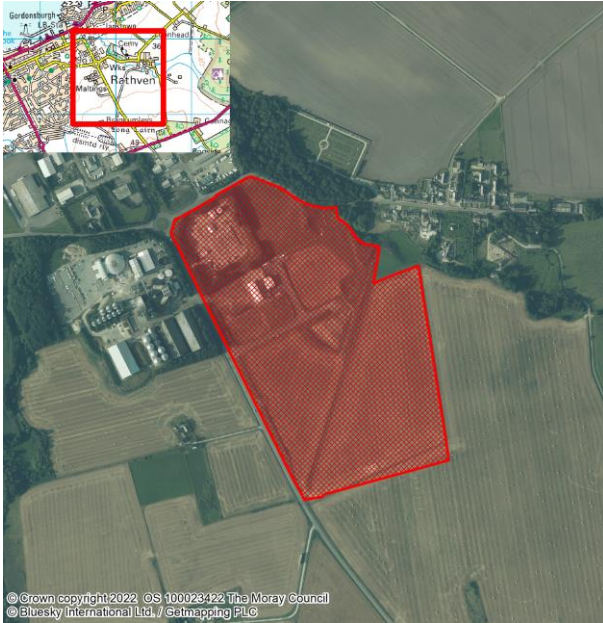
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2022

Reference:	M/BC/E/004	Town:	BUCKIE
Supply Type:	Effective	LPR:	20/13
Location:	March Road (SE)		
Grid Ref:	343984	865510	



Established Supply (Ha):

Gross Established:	17.69	Net Established:	14.55
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Effective Supply (Ha):

Effective:	14.55	General Industrial:	14.55
Immediately Available:	7.95	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

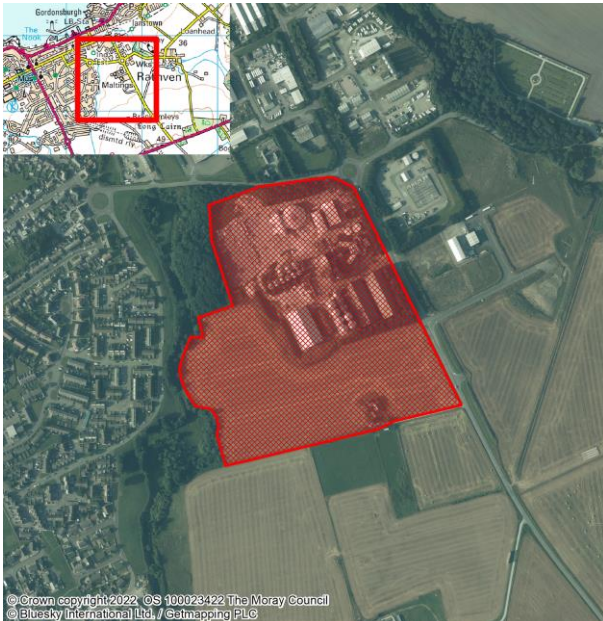
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	3.14	Under Construction:	0
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Reference:	M/BC/E/005	Town:	BUCKIE
Supply Type:	Constrained	LPR:	20/14
Location:	Maltings		
Grid Ref:	343676	865357	



Established Supply (Ha):

Gross Established:	10.3	Net Established:	8.5
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 8.5

Development (Ha):

Built:	5.96	Under Construction:	0
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The Moray Council Employment Land Audit 2022

Reference:	M/BC/E/006	Town:	BUCKIE
Supply Type:	Part Constrained	LPR:	20/15
Location:	The Harbour Area		
Grid Ref:	343086		865957



Established Supply (Ha):

Gross Established: 1.77 Net Established: 1.77

Effective Supply (Ha):

Effective: 0.77 General Industrial: 0.77
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

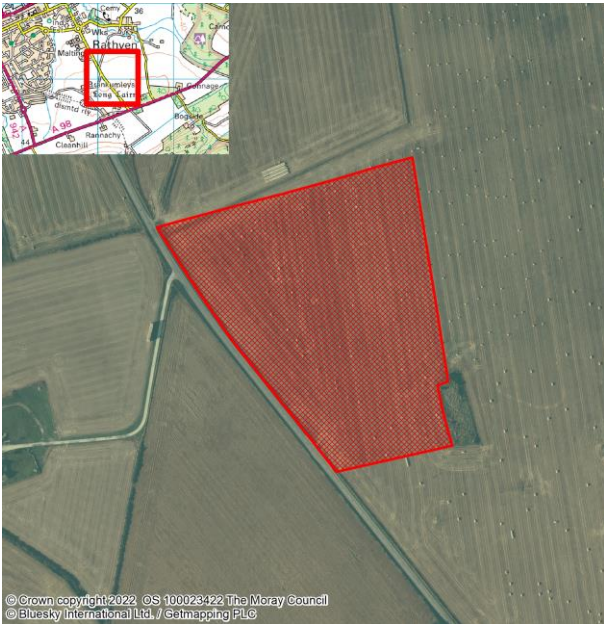
Owner Infrastructure Physical

Constrained Total (Ha): 1

Development (Ha):

Built: 20.97 Under Construction: 0

Reference:	M/BC/E/007	Town:	BUCKIE
Supply Type:	Effective 5years+	LPR:	20/LNG2
Location:	March Road (LONG)		
Grid Ref:	344222		865018



Established Supply (Ha):

Gross Established: 7.02 Net Established: 5.62

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 5.62

Constrained

Owner Infrastructure Physical

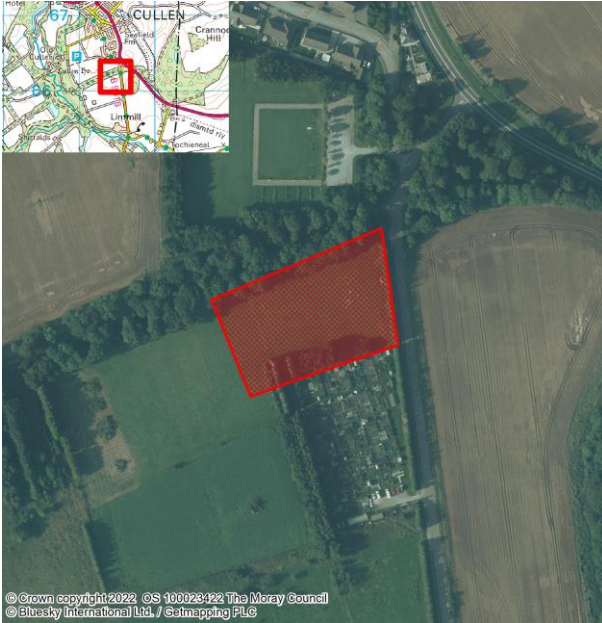
Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2022

Reference:	M/CL/E/002	Town:	CULLEN
Supply Type:	Effective	LPR:	20/11
Location:	South of Cemetery		
Grid Ref:	351482		866184



Established Supply (Ha):

Gross Established: 0.81 Net Established: 0.65

Effective Supply (Ha):

Effective: 0.65 General Industrial: 0
Immediately Available: 0 High Amenity: 0.65

LONG Supply (Ha):

LONG: 0

Constrained

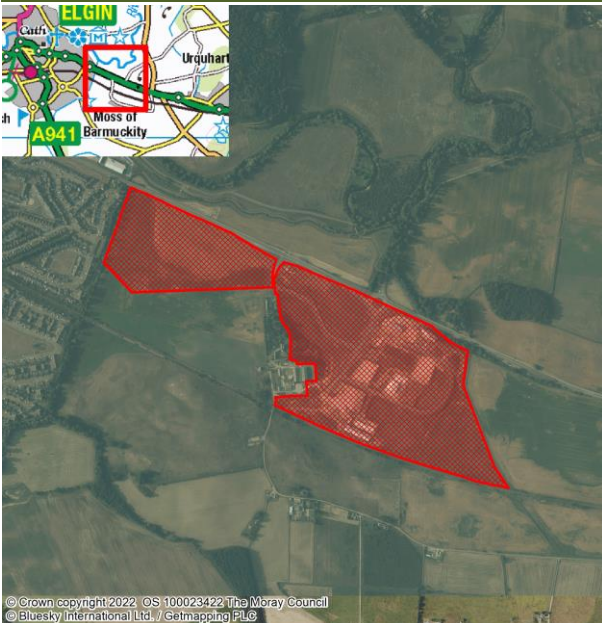
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/EL/E/001	Town:	ELGIN
Supply Type:	Part Constrained	LPR:	20/17
Location:	Elgin Business Park, Barmuckity		
Grid Ref:	324719		861725



Established Supply (Ha):

Gross Established: 33.83 Net Established: 22.34

Effective Supply (Ha):

Effective: 16.48 General Industrial: 10.31
Immediately Available: 10.29 High Amenity: 6.18

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

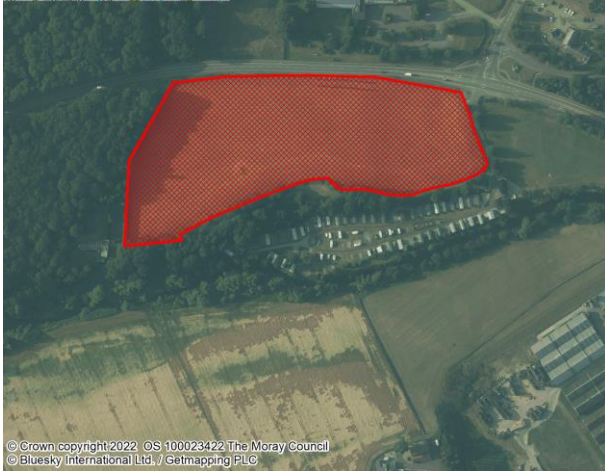
Constrained Total (Ha): 5.86

Development (Ha):

Built: 2.51 Under Construction: 2.52

The Moray Council Employment Land Audit 2022

Reference:	M/EL/E/002	Town:	ELGIN
Supply Type:	Constrained	LPR:	20/MU1
Location:	Riverview		
Grid Ref:	319633		862782



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Established Supply (Ha):

Gross Established: 4.12 Net Established: 3.3

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 3.3

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/EL/E/004	Town:	ELGIN
Supply Type:	Constrained	LPR:	20/112
Location:	Glen Moray Distillery		
Grid Ref:	319932		862424



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Established Supply (Ha):

Gross Established: 1.3 Net Established: 1.3

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

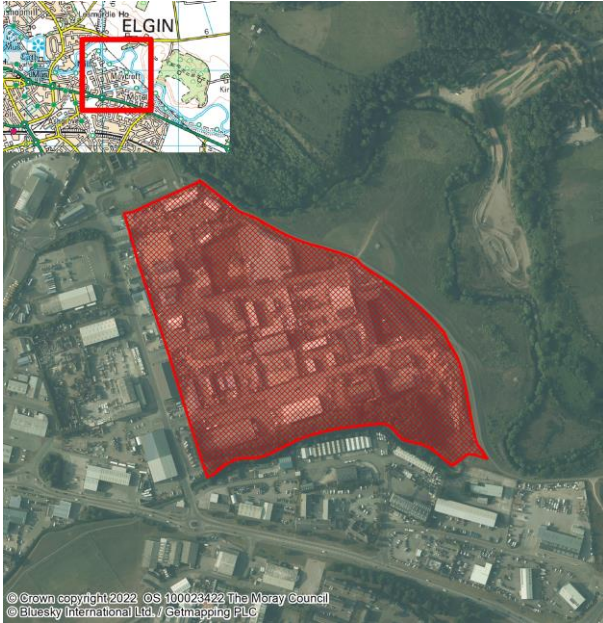
Constrained Total (Ha): 1.3

Development (Ha):

Built: 6.5 Under Construction: 0

The Moray Council Employment Land Audit 2022

Reference:	M/EL/E/008	Town:	ELGIN
Supply Type:	Part Constrained	LPR:	20/12
Location:	Chanonry Industrial Estate		
Grid Ref:	323161		862960



Established Supply (Ha):

Gross Established: 3.17 Net Established: 1.89

Effective Supply (Ha):

Effective: 0.67 General Industrial: 0.67
 Immediately Available: 0.67 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

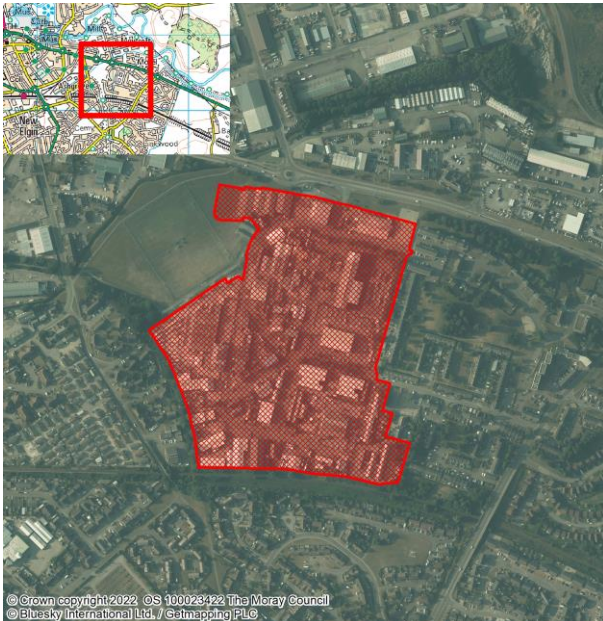
Owner Infrastructure Physical

Constrained Total (Ha): 1.22

Development (Ha):

Built: 10.36 Under Construction: 0

Reference:	M/EL/E/011	Town:	ELGIN
Supply Type:	Effective	LPR:	20/15
Location:	Pinefield Industrial Estate		
Grid Ref:	322991		862330



Established Supply (Ha):

Gross Established: 0.18 Net Established: 0.18

Effective Supply (Ha):

Effective: 0.18 General Industrial: 0.18
 Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

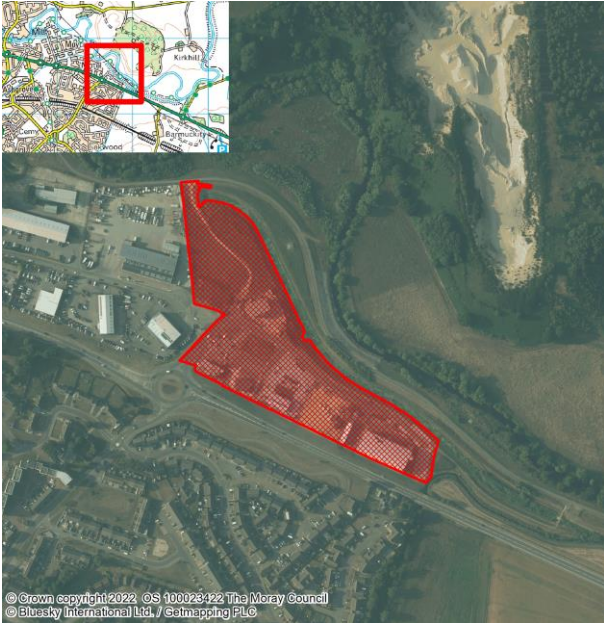
Constrained Total (Ha): 0

Development (Ha):

Built: 12.23 Under Construction: 0

The Moray Council Employment Land Audit 2022

Reference:	M/EL/E/012	Town:	ELGIN
Supply Type:	Effective	LPR:	20/16
Location:	Linkwood East		
Grid Ref:	323707		862498



Established Supply (Ha):

Gross Established:	1.71	Net Established:	1.4
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Effective Supply (Ha):

Effective:	1.4	General Industrial:	1.4
Immediately Available:	1.4	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

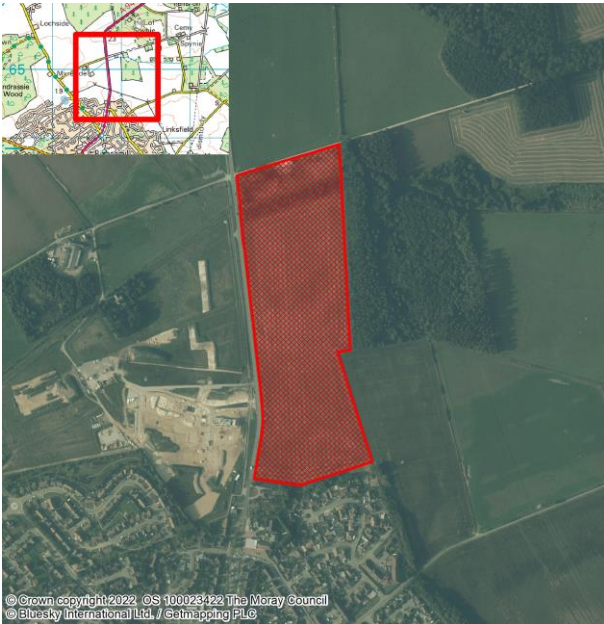
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	2.01	Under Construction:	0
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Reference:	M/EL/E/016	Town:	ELGIN
Supply Type:	Effective	LPR:	20/18
Location:	Newfield		
Grid Ref:	321907		864903



Established Supply (Ha):

Gross Established:	12	Net Established:	9.6
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Effective Supply (Ha):

Effective:	9.6	General Industrial:	9.6
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

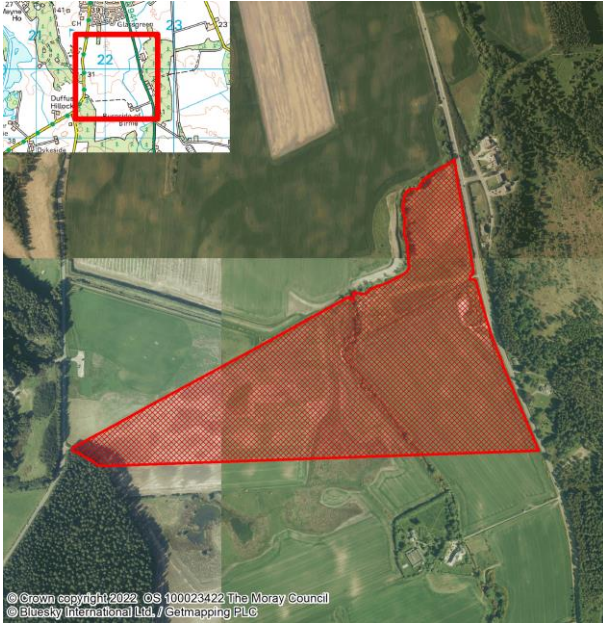
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2022

Reference:	M/EL/E/017	Town:	ELGIN
Supply Type:	Part Constrained	LPR:	20/116
Location:	Burnside of Birnie		
Grid Ref:	322206	859613	



Established Supply (Ha):

Gross Established: 22.3 Net Established: 17.87

Effective Supply (Ha):

Effective: 9 General Industrial: 4
Immediately Available: 0 High Amenity: 5

LONG Supply (Ha):

LONG: 0

Constrained

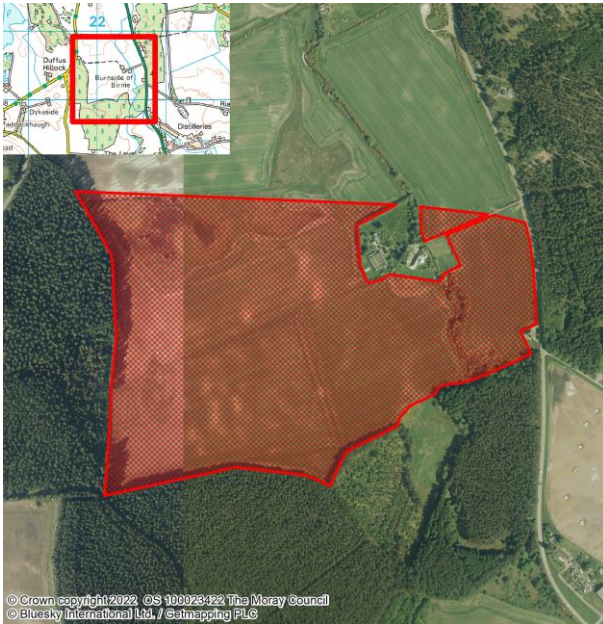
Owner Infrastructure Physical

Constrained Total (Ha): 8.87

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/EL/E/018	Town:	ELGIN
Supply Type:	Part Constrained	LPR:	20/LNG3
Location:	Burnside of Birnie (LONG)		
Grid Ref:	322279	859158	



Established Supply (Ha):

Gross Established: 38.2 Net Established: 30.56

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 20.74

Constrained

Owner Infrastructure Physical

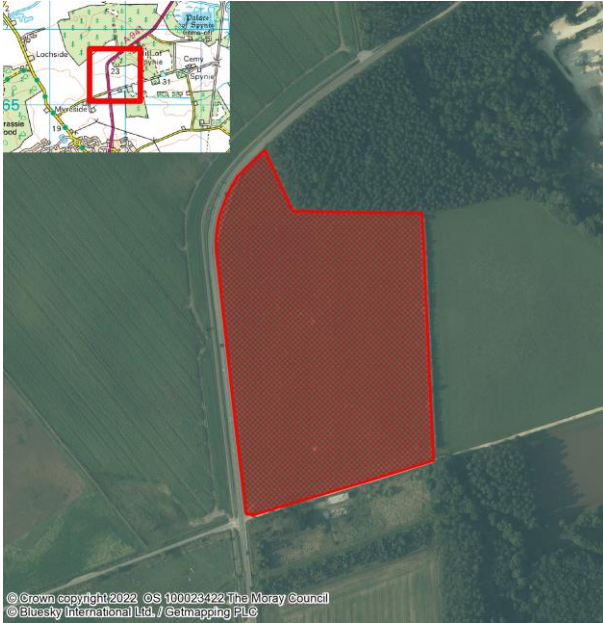
Constrained Total (Ha): 9.8

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2022

Reference:	M/EL/E/019	Town:	ELGIN
Supply Type:	Effective	LPR:	20/MU2
Location:	Lossiemouth Road (NE)		
Grid Ref:	321871		865361



Established Supply (Ha):

Gross Established: 7 Net Established: 5.6

Effective Supply (Ha):

Effective: 5.6 General Industrial: 0
 Immediately Available: 0 High Amenity: 5.6

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/EL/E/020	Town:	ELGIN
Supply Type:	Effective	LPR:	20/OPP4
Location:	Ashgrove Road (Yard)		
Grid Ref:	322589		862554



Established Supply (Ha):

Gross Established: 1.6 Net Established: 1.28

Effective Supply (Ha):

Effective: 1.28 General Industrial: 1.28
 Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

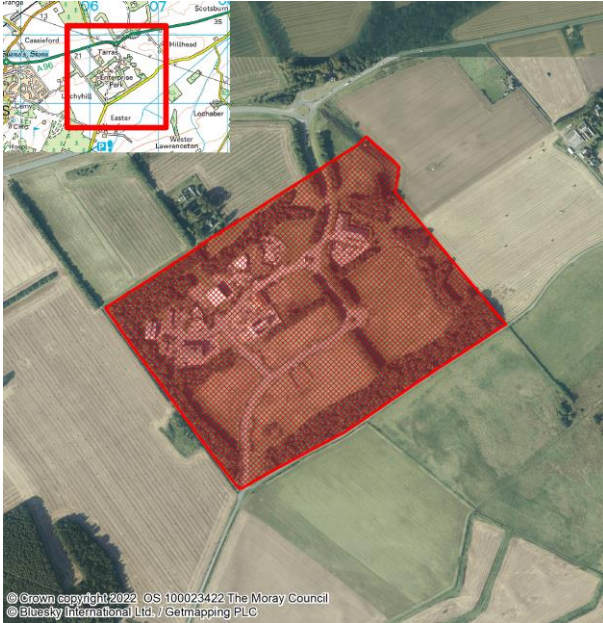
Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2022

Reference:	M/FR/E/001	Town:	FORRES
Supply Type:	Effective	LPR:	20/BP1
Location:	Forres Enterprise Park		
Grid Ref:	306378		859307



Established Supply (Ha):

Gross Established:	22.88	Net Established:	13.02
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Effective Supply (Ha):

Effective:	13.02	General Industrial:	2.75
Immediately Available:	13.02	High Amenity:	10.27

LONG Supply (Ha):

LONG:	0
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Constrained

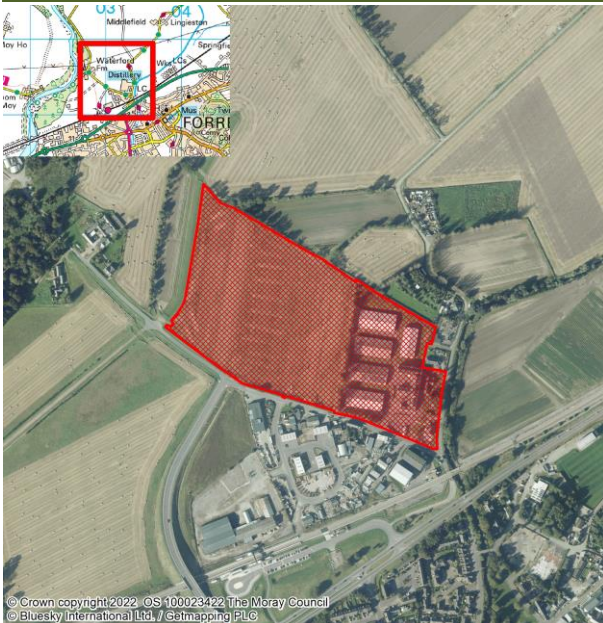
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	17.92	Under Construction:	0
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Reference:	M/FR/E/006	Town:	FORRES
Supply Type:	Constrained	LPR:	20/13
Location:	Benromach Distillery		
Grid Ref:	303187		859423



Established Supply (Ha):

Gross Established:	4	Net Established:	3.2
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

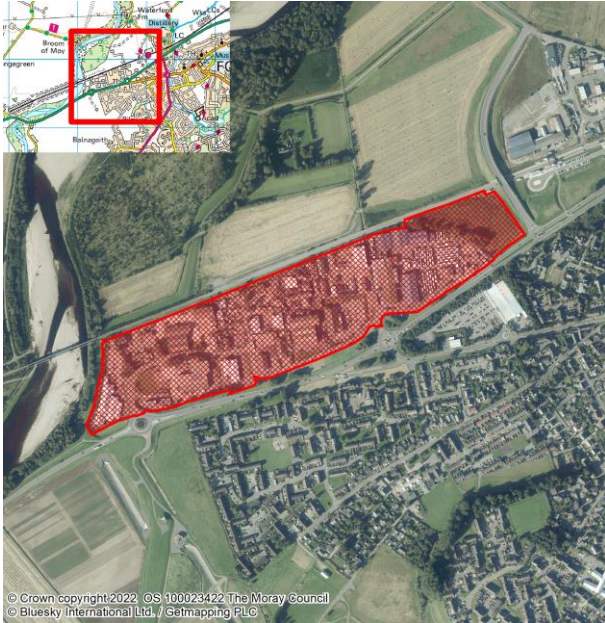
Constrained Total (Ha): 3.2

Development (Ha):

Built:	4	Under Construction:	1.3
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The Moray Council Employment Land Audit 2022

Reference:	M/FR/E/012	Town:	FORRES
Supply Type:	Constrained	LPR:	20/11
Location:	Greshop		
Grid Ref:	302463	858717	



Established Supply (Ha):

Gross Established: 0 Net Established: 0

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

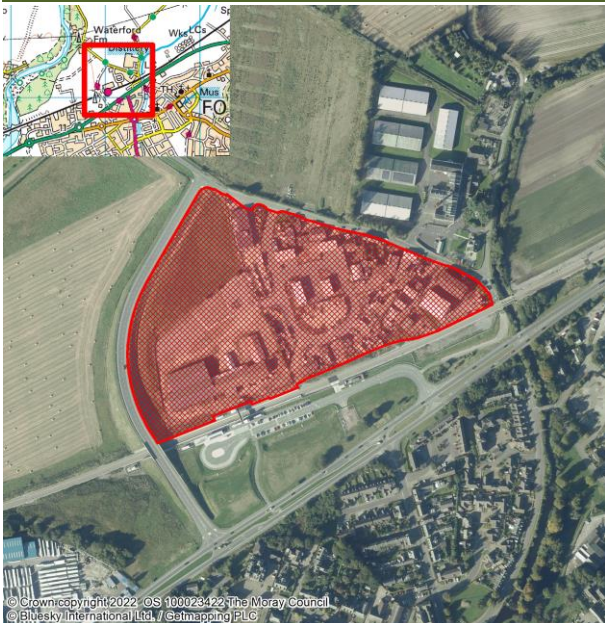
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 16.7 Under Construction: 0

Reference:	M/FR/E/013	Town:	FORRES
Supply Type:	Constrained	LPR:	20/12
Location:	Waterford		
Grid Ref:	303151	859195	



Established Supply (Ha):

Gross Established: 1 Net Established: 0.8

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

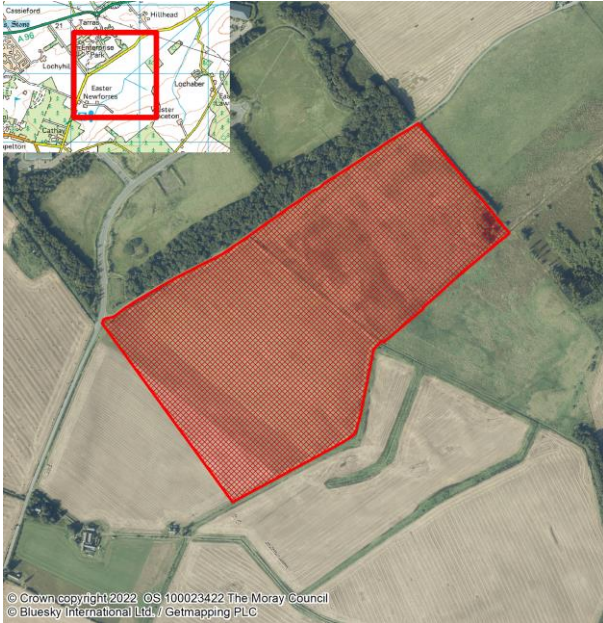
Constrained Total (Ha): 0.8

Development (Ha):

Built: 6.2 Under Construction: 0

The Moray Council Employment Land Audit 2022

Reference:	M/FR/E/014	Town:	FORRES
Supply Type:	Constrained	LPR:	20/14
Location:	Easter Newforres		
Grid Ref:	306670		859033



Established Supply (Ha):

Gross Established:	27.6	Net Established:	17.75
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Effective Supply (Ha):

Effective:	General Industrial:	0
Immediately Available:	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

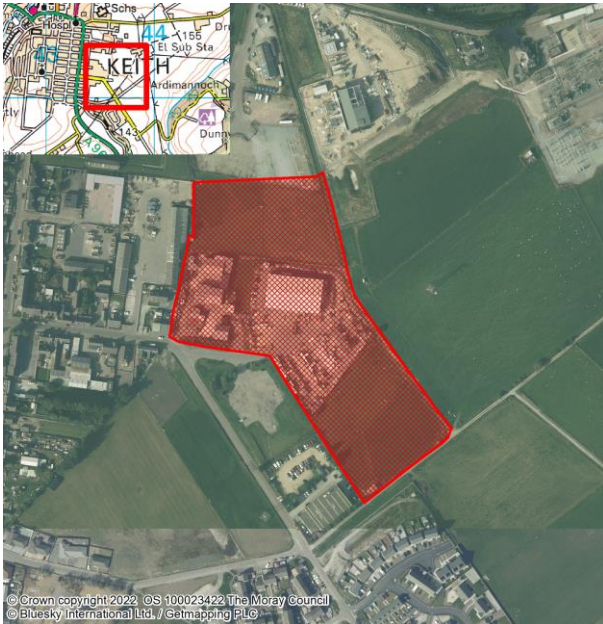
Owner Infrastructure Physical

Constrained Total (Ha): 17.75

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/KH/E/004	Town:	KEITH
Supply Type:	Effective	LPR:	20/14
Location:	Bridge Street		
Grid Ref:	343609		850228



Established Supply (Ha):

Gross Established:	2.05	Net Established:	1.64
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Effective Supply (Ha):

Effective:	1.64	General Industrial:	1.64
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

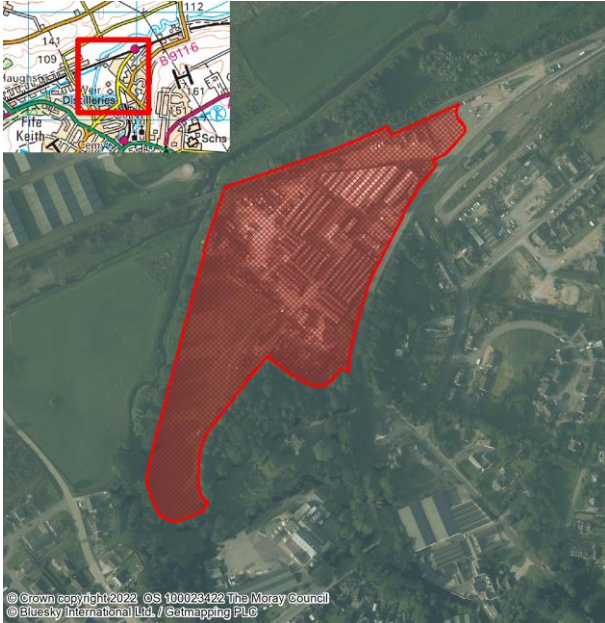
Constrained Total (Ha): 0

Development (Ha):

Built:	1.72	Under Construction:	0
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The Moray Council Employment Land Audit 2022

Reference:	M/KH/E/005	Town:	KEITH
Supply Type:	Constrained	LPR:	20/17
Location:	Isla Bank Mills		
Grid Ref:	342764		851453



Established Supply (Ha):

Gross Established:	1.84	Net Established:	1.84
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

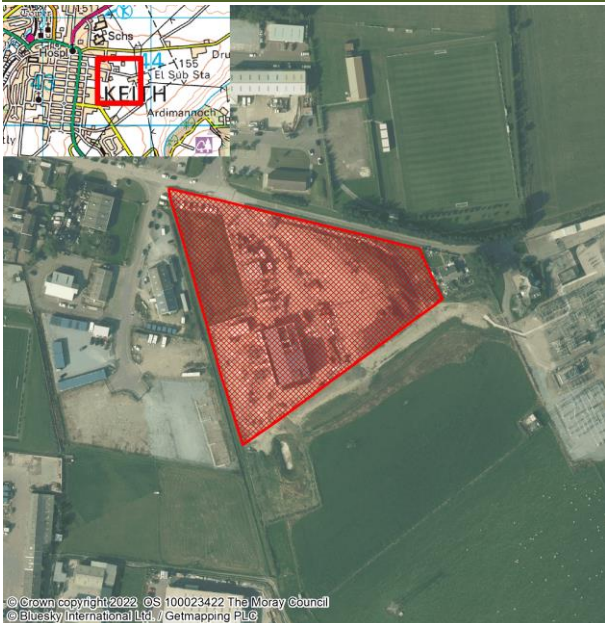
Owner
 Infrastructure
 Physical

Constrained Total (Ha): 1.84

Development (Ha):

Built:	4.03	Under Construction:	0
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Reference:	M/KH/E/009	Town:	KEITH
Supply Type:	Effective	LPR:	20/13
Location:	Westerton Road East		
Grid Ref:	343643		850438



Established Supply (Ha):

Gross Established:	0	Net Established:	0
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

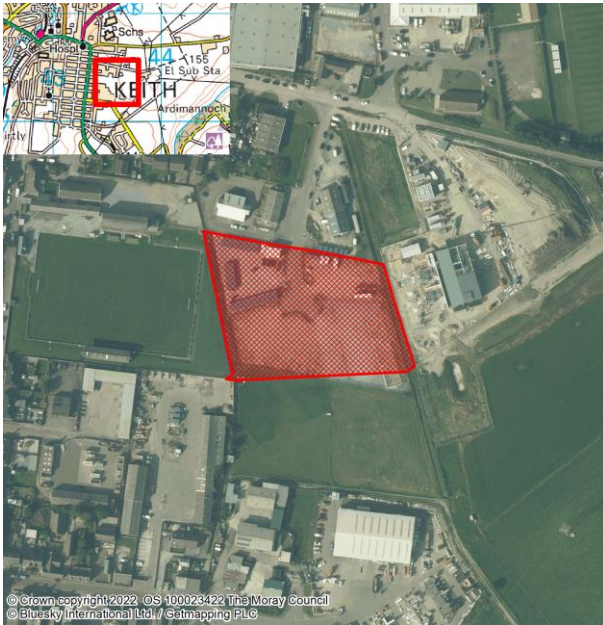
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	1.62
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The Moray Council Employment Land Audit 2022

Reference:	M/KH/E/010	Town:	KEITH
Supply Type:	Effective	LPR:	20/12
Location:	Westerton Road South		
Grid Ref:	343584		850372



Established Supply (Ha):

Gross Established:	0.52	Net Established:	0.52
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Effective Supply (Ha):

Effective:	0.52	General Industrial:	0.52
Immediately Available:	0.52	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

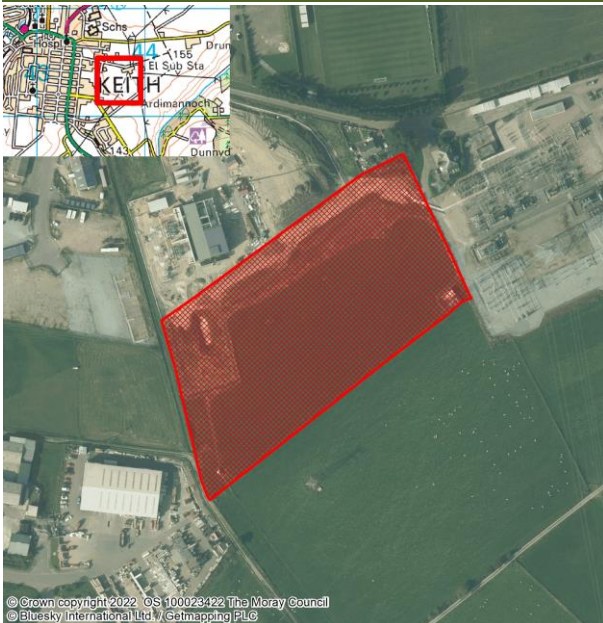
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	1.45	Under Construction:	0
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Reference:	M/KH/E/011	Town:	KEITH
Supply Type:	Effective	LPR:	20/111
Location:	Westerton Road East Expansion		
Grid Ref:	343761		850329



Established Supply (Ha):

Gross Established:	1.74	Net Established:	1.39
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Effective Supply (Ha):

Effective:	1.39	General Industrial:	1.39
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

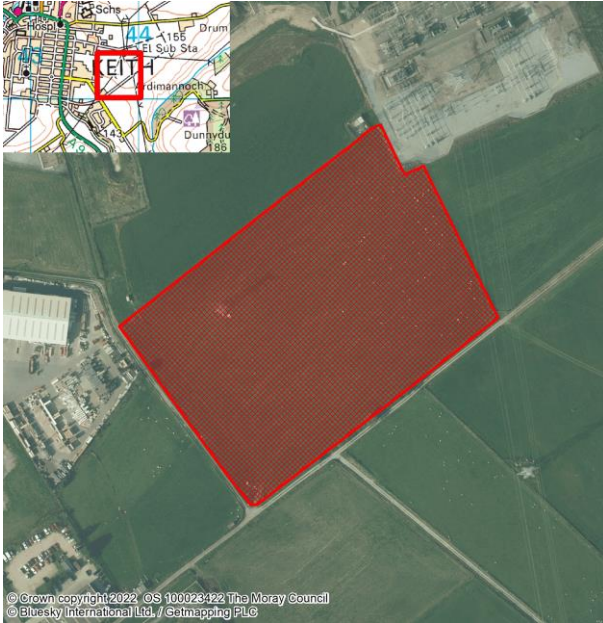
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0.56
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The Moray Council Employment Land Audit 2022

Reference:	M/KH/E/012	Town:	KEITH
Supply Type:	Effective 5years+	LPR:	20/LNG2
Location:	Westerton Road (LONG)		
Grid Ref:	343822	850218	



Established Supply (Ha):

Gross Established:	3.2	Net Established:	2.5
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	2.5
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Constrained

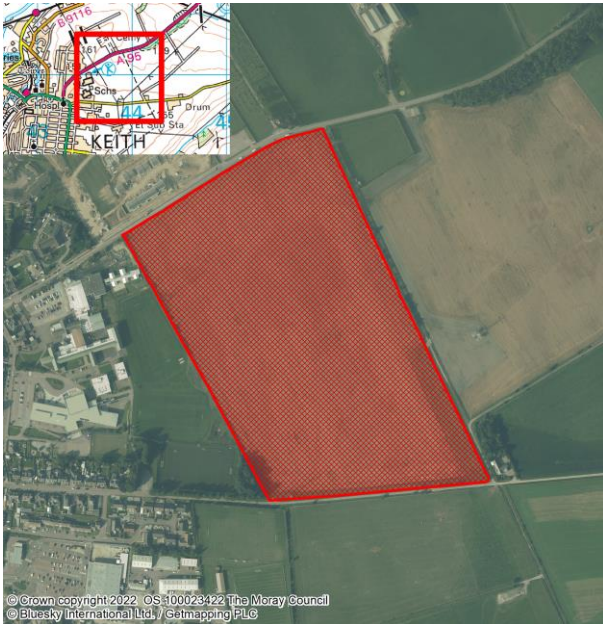
Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/KH/E/013	Town:	KEITH
Supply Type:	Effective	LPR:	20/MU
Location:	Banff Road South		
Grid Ref:	343847	850958	



Established Supply (Ha):

Gross Established:	1.75	Net Established:	1.75
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Effective Supply (Ha):

Effective:	1.75	General Industrial:	0
Immediately Available:	0	High Amenity:	1.75

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

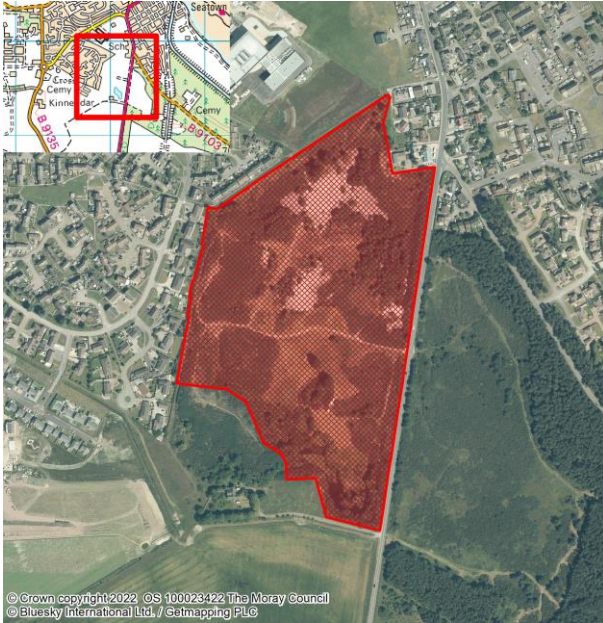
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2022

Reference:	M/LS/E/007	Town:	LOSSIEMOUTH
Supply Type:	Constrained	LPR:	20/OPP1
Location:	Sunbank		
Grid Ref:	323075		869644



Established Supply (Ha):

Gross Established: 12.8 Net Established: 10.24

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

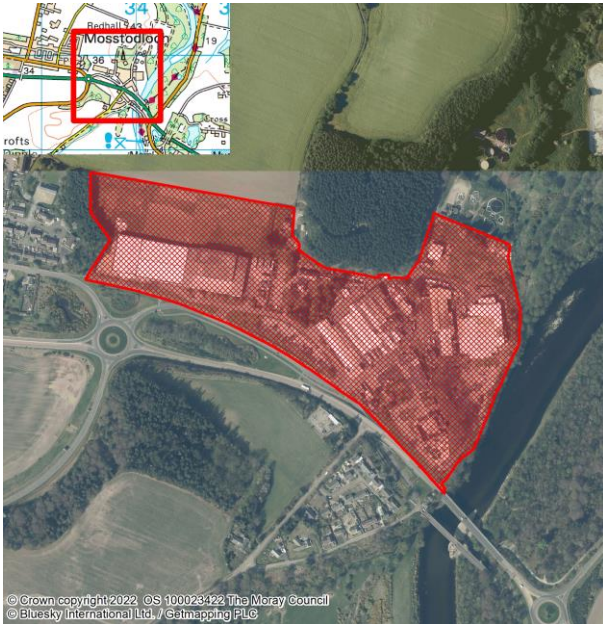
Owner Infrastructure Physical

Constrained Total (Ha): 10.24

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/MS/E/003	Town:	MOSSTODLOCH
Supply Type:	Constrained	LPR:	20/15
Location:	Baxters		
Grid Ref:	333948		859705



Established Supply (Ha):

Gross Established: 2.22 Net Established: 1.78

Effective Supply (Ha):

Effective: 0 General Industrial: 0
Immediately Available: 0 High Amenity: 0

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 1.78

Development (Ha):

Built: 12.05 Under Construction: 0

The Moray Council Employment Land Audit 2022

Reference:	M/MS/E/005	Town:	MOSSTODLOCH
Supply Type:	Constrained	LPR:	20/12
Location:	North of Baxter's		
Grid Ref:	333613		860016



Established Supply (Ha):

Gross Established:	3.22	Net Established:	2.57
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

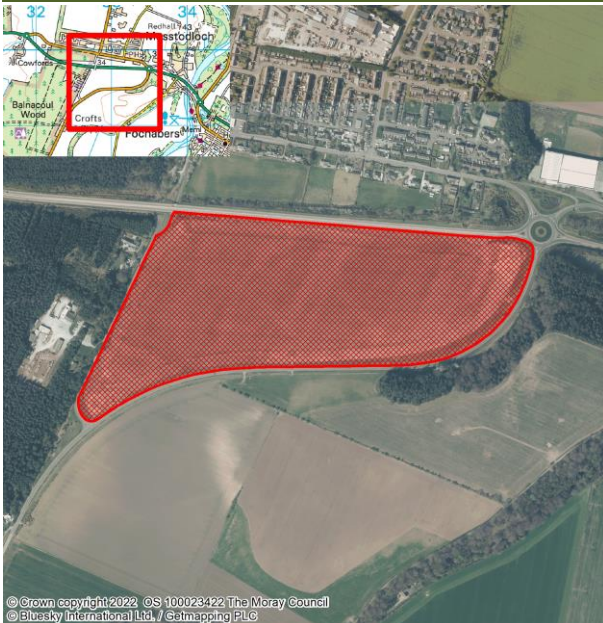
Owner Infrastructure Physical

Constrained Total (Ha): 2.57

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/MS/E/006	Town:	MOSSTODLOCH
Supply Type:	Effective 5years+	LPR:	20/MUL1
Location:	South of A96		
Grid Ref:	333268		859627



Established Supply (Ha):

Gross Established:	11	Net Established:	8
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	8
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Constrained

Owner Infrastructure Physical

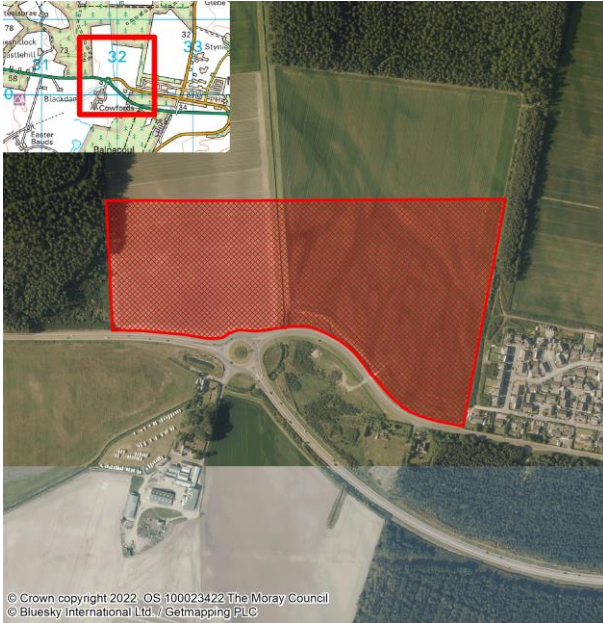
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2022

Reference:	M/MS/E/007	Town:	MOSSTODLOCH
Supply Type:	Effective	LPR:	20/13
Location:	West of Mosstodloch		
Grid Ref:	331976		860333



Established Supply (Ha):

Gross Established:	16	Net Established:	12.8
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Effective Supply (Ha):

Effective:	12.8	General Industrial:	12.8
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

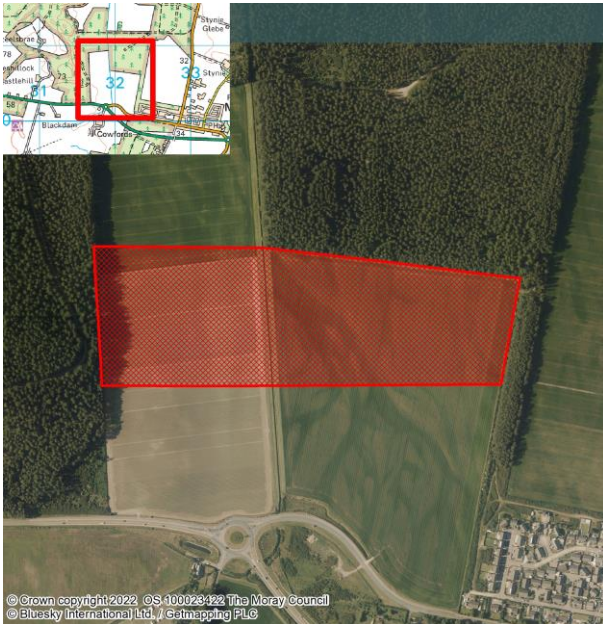
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/MS/E/008	Town:	MOSSTODLOCH
Supply Type:	Effective 5years+	LPR:	20/LNG2
Location:	West of Mosstodloch (LONG)		
Grid Ref:	331976		860549



Established Supply (Ha):

Gross Established:	14	Net Established:	11.2
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Effective Supply (Ha):

Effective:	0	General Industrial:	0
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	11.2
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Constrained

Owner Infrastructure Physical

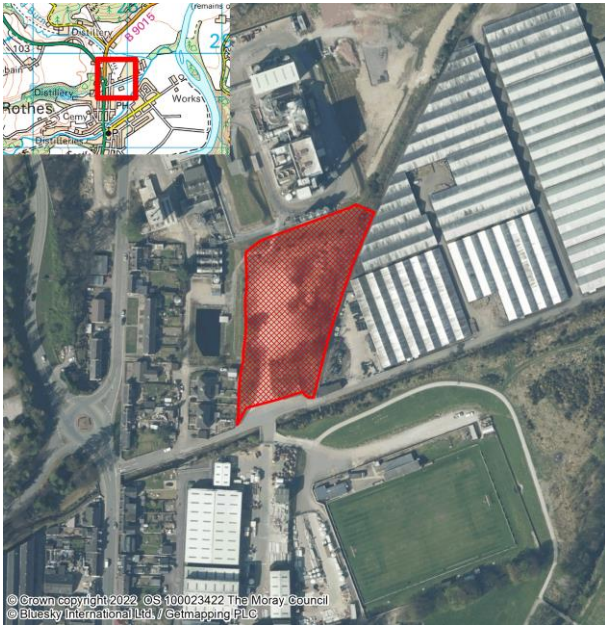
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2022

Reference:	M/RS/E/001	Town:	ROTHES
Supply Type:	Effective	LPR:	20/11
Location:	Back Burn		
Grid Ref:	327876	849746	



Established Supply (Ha):

Gross Established:	0.75	Net Established:	0.6
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Effective Supply (Ha):

Effective:	0.6	General Industrial:	0.6
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

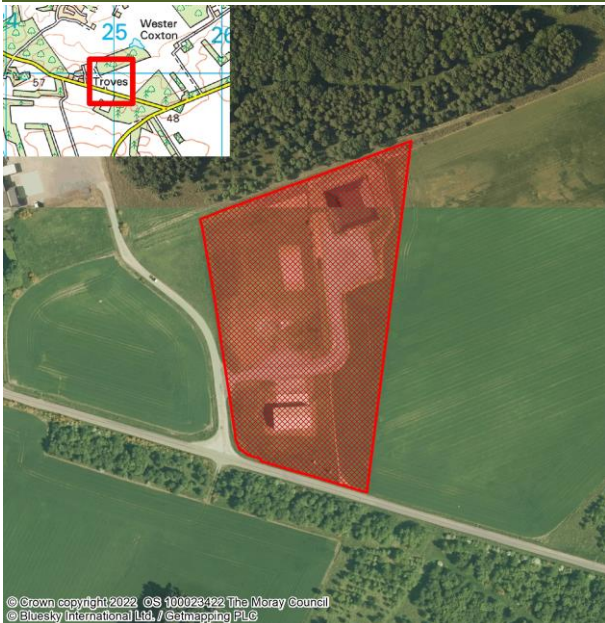
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/TV/E/001	Town:	TROVES
Supply Type:	Effective	LPR:	20/11
Location:	Troves Industrial Estate		
Grid Ref:	324974	324974	



Established Supply (Ha):

Gross Established:	1.61	Net Established:	1.1
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Effective Supply (Ha):

Effective:	1.1	General Industrial:	1.1
Immediately Available:	0	High Amenity:	0

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	
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