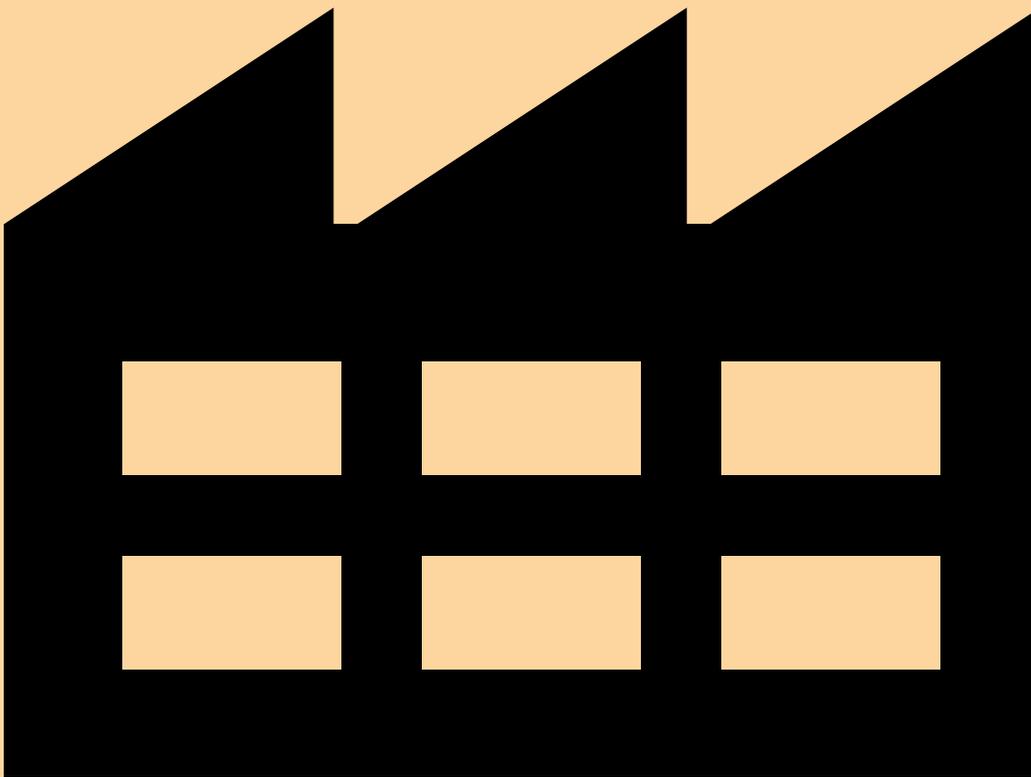


DUMFRIES AND GALLOWAY LOCAL DEVELOPMENT PLAN

Business and Industry Land Audit 2018



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Business & Industry Land Audit 2018

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October 2018

1. Introduction

Purpose of Audit

1.1 The 2018 Audit has been prepared to provide up-to-date and accurate information on the supply and availability of business and industrial land in Dumfries and Galloway.

The Audit provides an evidence base for the monitoring and review of policies and proposals relating to allocated business and industrial land in the Local Development Plan (LDP). In addition, the information provided in the Audit may highlight areas where further research and analysis is required. The Audit is also of interest to other departments in the Council as well as companies, developers and other organisations with a requirement for or interest in business and industrial land in Dumfries and Galloway.

The Audit was prepared using Council resources, in consultation with Economic Development. The Audit is an annual document and includes figures for take up and sites under construction.

This year's Audit records the allocated business and industry land supply at 31 March 2018 and the take-up of business and industrial land between 1 April 2017 to 31 March 2018.

2. Policy Context

The Scottish Government's National Planning Framework 3 (2014), Scottish Planning Policy (2014) and Dumfries and Galloway Local Development Plan (2014) all provide the context for the provision of business and industrial land within Dumfries and Galloway.

2.1 The Scottish Government published the **National Planning Framework 3** (NPF3) in June 2014. The NPF3 aims to provide a framework for the spatial development of Scotland and sets out the Government's development priorities over the next 20-30 years with a focus on supporting sustainable economic growth and the transition to a low carbon economy. It identifies national developments which support the Government Economic Strategy, prioritising further 'investment and innovation, supporting inclusive growth and maintaining focus on increased internationalisation' with the 'aim to achieve a more productive, cohesive and fairer Scotland' (Scottish Economic Strategy 2015).

NPF3 states that Planning Authorities, when preparing statutory development plans, must have regard to the NPF. In order to secure sustainable economic growth and support the transition to a low carbon economy, there is a need for sufficient business and industry land of the right quality and in the right location. The Business and Industry Land Audit is one mechanism to assess whether this is being met within Dumfries and Galloway.

2.2 The Scottish Government's planning policy for economic development is set out in **Scottish Planning Policy** published in June 2014. It recommends Planning Authorities ensure there is a range and choice of marketable sites and locations for businesses allocated in development plans, including opportunities for mixed-use development, to meet anticipated requirements and a variety of size and quality requirements. Marketable land should meet business requirements, be serviced or serviceable within 5 years, be accessible by walking; cycling and public transport, and have a secure planning status (allocated or planning consent). The supply of marketable sites should be under regular review and new sites brought forward if existing allocations do not meet current and expected market expectations.

2.3 **Dumfries and Galloway Local Development Plan (LDP)** was adopted in September 2014 and aims to safeguard established and allocate new sites for business and industry in Dumfries, the District and Local Centres, Chapelcross and along the A74(M) corridor. Most sites are within or on the edge of existing settlements to minimise the need to travel by car, making use of public transport and opportunities to walk or cycle. The sites at Chapelcross and along the A74 (M) corridor have been allocated to promote and maximise the strategic economic development potential of the M74 corridor, which benefits from good road and rail links, and to regenerate and offset the impact of the eventual

closure of the former Chapelcross nuclear power station. The business and industry sites allocated in the LDP are included in the Business and Industry Land Supply Tables in Appendix 3.

2.4 The adopted LDP is currently under review. **Dumfries and Galloway Proposed Local Development Plan (LDP2)** was agreed at Dumfries and Galloway's Full Council meeting on Thursday 18 January 2018 and a public consultation period was held from 29 January until 26 March 2018. All representations received, will be considered and responded to by the planning authority, and unresolved representations submitted to the Scottish Government Planning and Environmental Appeals Division (DPEA) in September 2018 for public examination.

2.5 The purpose of the **Employment and Property Land Study (March 2017)** http://www.dumgal.gov.uk/media/19630/LDP2-Employment-and-Property-Land-Study/pdf/2017_March_Technical_Paper_Employment_Land_and_Property_Study_Ryden_FINAL_DRAFT.pdf was to consider the strategic economic and property market context for the Dumfries and Galloway region. The study found that the area lacks available serviced employment sites with over half of the available supply constrained due to lack of infrastructure, services and ownership issues.

2.6 The Borderlands Partnership brings together the five cross-border local authorities (Carlisle City Council, Cumbria County Council, Dumfries and Galloway Council, Northumberland County Council and Scottish Borders Council) to promote the economic growth and competitiveness of the area that straddles the Scotland-England Border. In September 2017, the vision for the future in The Borderlands Inclusive Growth Proposition was set out and sent to the UK and Scottish Governments to consider. In the budget announcement December 2017, the UK Chancellor committed to open negotiations on a Growth Deal for the area. The Strategic Outline Business Case - the first stage in developing the **Borderlands Inclusive Growth Deal** - will be submitted to the UK and Scottish Governments by September 2018. Proposals include realising the potential of the former nuclear Chapelcross site, a Business Infrastructure Programme (BIP), which will invest in business sites and infrastructure to support the development of business premises to accommodate business growth and diversification, and improvements to strategic transport schemes.

3 Business and Industry Audit 2018

3.1 Preparation of Audit

The Audit was prepared using information gathered through site visits, monitoring planning applications and site-specific information provided by key stakeholders (Transport Scotland, SEPA and Scottish Water) in terms of potential constraints of accessibility, flood risk, drainage, and water supply capacity. Landowners were contacted to establish if the site is still available for development and whether there has been any interest from the market in developing the site.

All LDP allocated business and industry sites are recorded in a database along with the site name/location, LDP ref, total area, servicing, availability and site description. The sites are allocated by Housing Market Area (HMA) – see Map 1. There are six HMA's in Dumfries and Galloway: Annan, Eskdale, Dumfries, Mid Galloway, Stewartry and Stranraer. This information was then analysed to determine the business and industry land supply and produce the Audit report. A Glossary, Map of Housing Market Areas and list of abbreviations can be found at Appendix 1. Please refer to the LDP for site boundaries within settlement maps.

The site description indicates whether a site is greenfield or brownfield; under private or public ownership; has planning permission; potential constraints; under construction/developed. If a site has planning consent, the reference is provided. If consent has expired, this will also be stated.

3.2 Business and Industry Land Supply

The Audit identifies several categories of business and industry land supply: available, immediately available, marketable and constrained. Land that is considered 'effective' is the sum of land that is immediately available and marketable, without constraints. A breakdown of each category and the associated meaning is provided in Appendix 2.

Table 1 below provides a summary of the total available business and industry land in Dumfries and Galloway following the 2018 Audit. The allocated employment land supply at 31/03/2018 is **225.78 ha**. 43% of the allocated employment land supply is effective (immediately available or could be developed in the next 1-5 years). 57% is constrained and prevents land being developed immediately or within 1-5 years.

Table 2 breaks the figures down further by Housing Market Area. The majority (63%) of the total available business and industry land is focussed in Annan HMA followed by Dumfries HMA (26%) and Stranraer HMA (9%). The emphasis on supply is to the east of Dumfries and Galloway particularly towards the A74 (M), at Chapelcross and the Gretna Lockerbie Annan (GLA) corridor, which reflects the economic strategy set out the LDP with more limited supply in the remainder of the settlements. However, policies in the LDP allow for suitable sites not allocated in the plan to be developed and for businesses to develop in the rural area.

Table 1: Business and Industry Land Summary

	Area Ha	%
Total available (not taken up) business and industry land	225.78	100
Total business and industry land that is immediately available (IA) and therefore marketable	28	12
Total business and industry land that is marketable	69.32	31
Total business and industry land that is effective (IA + Marketable)	97.32	43
Total business and industry land that has constraints , NOT considered marketable or immediately available	128.46	57

Table 2: Business and Industry Land Supply by Local Development Plan Housing Market Area

LDP HMA	Total Available Business and Industry Land (ha)	Immediately Available (ha)	Marketable Area (ha)	Constrained Area (ha)
Annan	141.53	15.3	12.87	113.36
Dumfries	57.82	10.87	34.65	12.3
Eskdale	0	0	0	0
Mid Galloway	4.3	0	1.5	2.8
Stewartry	1.83	1.83	0	0
Stranraer	20.3	0	20.3	0
TOTAL	225.78	28	69.32	128.46

3.3 Business and Industry Land Annual Take Up by Year

Table 3: Annual Take up of Business and Industry Land by Housing Market Area

Business and Industry Land Take Up by HMA (Ha)	1/07/2012-30/06/2013	1/07/2013-31/03/2014	1/04/2014-31/03/2015	1/04/2015-31/03/2016	1/04/2016-31/03/2017	1/04/2017-31/03/2018
Annan	0	5.5	0	0	4.7	0
Dumfries	0	3.32	2	0	23.31 (a)	0(b)
Eskdale	0	0	0	0	0	0
Mid Galloway	0	0	0	0	4.1	0
Stewartry	0	0	0	0	0.82	0
Stranraer	0	0	0	0	0	0
TOTAL	0	8.82	2	0	32.93 (c)	0

(a) 2016/17 Figure includes 18.97 hectares taken up for other uses other than Employment Land - Dumfries and Galloway Royal Infirmary

(b) MOF.MU1: Moffat Academy – Allocated as mixed use site to include flexible business units in adopted Local Development Plan. Planning approval 7 February 2018 subject to conditions for flatted accommodation. (16/1514/FUL) (16/1513/LBC)

(c) 2016/17 total take up of land for business and industry use = 13.96 ha

3.4 Analysis of Take Up

Take-up of employment land has focussed largely to the east of the region, within the Annan and Dumfries HMAs. However, there has been some take-up in Stewartry and Mid-Galloway markets, namely in the larger settlements of Dalbeattie and Newton Stewart, respectively.

Annan HMA has a generous supply of employment land, which is largely located at Chapelcross and is constrained. In Annan, there has been steady development of the ANN.B&I1 Stapleton Road site, since the site was bought and serviced by Scottish Enterprise (2013/2014 employment land take up). This demonstrates there is demand for serviced sites and industrial/business uses at this location. Local businesses expanding and relocating here include Carrs Billington Agriculture Ltd- an agriculture and rural supplies company, and Ponsee UK Ltd- an agriculture and forestry servicing and supplies company. There is ongoing interest in plots at this site from local companies seeking to expand and relocate.

Within Dumfries HMA and along the Gretna-Lockerbie-Annan regeneration (GLA) corridor, the A74(M):B&I1 Hangingshaw, Johnstonebridge site has shown steady take-up. Some 4.7 ha was taken up by Lockerbie Lorry Park and in 2018/19 some 8.8 ha is currently under construction for the erection of a sawmill and timber processing plant by James Jones and Sons Ltd. Lockerbie has been the subject of business and industrial development due to its connectivity to the A74(M), and includes take up of business and industry land at LRB.B&I1 Dryfe Road (PPM Ltd- a used and refurbished process equipment supplier) and at LRB.B&I2 Broomhouses (Robinsons Scotland Ltd- a steel frame building manufacturer).

Trends indicate a loss of business and industry land to other uses:

2014/15 - 2 ha in Lockerbie at LRB.B&I3 Former Primary School due to its development as a Multi-Use Games Arena (MUGA),

2016/17 - 18.97 ha in Dumfries due to the construction of the new Dumfries & Galloway Royal Infirmary at the site DFS.B&I3 Garroch Loaning;

2017/18 – Planning and listed building consent was approved (February 2018) for redevelopment of MOF.MU1 Moffat Academy for flatted accommodation (16/1514/FUL) (16/1513/LBC). It was allocated as mixed-use site to include flexible business units in the adopted Local Development Plan.

In light of the recent take up of sites and loss of business and industry land to other land uses, the effective land supply has reduced and requires additional land to be allocated. This is addressed in the Proposed Local Development Plan LDP2 (January 2018). In order to identify further business and industry sites to accommodate employment opportunities and grow business over the period 2017-2037, the Proposed LDP2 proposes to allocate an additional 44 hectares of land for business and industry. The majority of new business and industry sites are in Dumfries, the District Centres adjacent to the A75 corridor, within the Gretna-Lockerbie-Annan regeneration corridor and other District Centres to meet local needs. New allocations will be included in the Audit when LDP2 is adopted.

Appendix 1: Glossary of terms

Area: Site Area (gross) in hectares. Site areas, in all cases are approximate, and are only intended as a guide.

Available Land: Undeveloped land included in the Business and Industry Land Audit.

Brownfield Sites: Land/sites which have previously been developed, or used for some purpose that has ceased. They may encompass vacant or derelict land; infill sites; land occupied by redundant or unused buildings; and developed land within the settlement boundary, where further intensification of use is considered acceptable. Private and public gardens, sports and recreation grounds, woodlands and amenity open space are excluded.

Constrained Land: Constraints include:

Ownership: Land subject to ownership difficulties e.g. owner seeking alternative use to allocation, unwilling seller, multiple owners.

Contamination: Previous use on the site that would warrant the site to be remediated prior to any future development.

Infrastructure: No access, water, gas, foul drainage disposal, surface water disposal, or telecommunications.

Marketability: Sites which are not considered to be marketable in the current economic climate.

Physical: Sites with physical constraints such as topography, ground conditions, flooding and landlocked sites.

Effective Land Supply: The part of the business and industry land supply that is expected to be free of development constraints in the period under consideration. It will therefore be available for construction/development.

Business and Industry (B&I) Land: This includes land allocated for general industrial and business/office use, storage and distribution, business parks and specialist technology parks, including research and development uses. This mainly comprises Classes 4, 5 and 6 of the 1997 Town and Country Planning (Use Classes) (Scotland) Order, but is not exclusive to these uses.

Business and Industry Audit: Also known as Employment Land Audit this is an annual mechanism for monitoring the employment or business and industry land supply and identifying sites within the established land supply that are expected to be effective within the period under consideration.

Greenfield Sites: Sites which have never been previously developed or used for an urban use, or are on land that has been brought into active or beneficial use for agriculture or forestry i.e. fully restored derelict land, but excluding open space that has been temporarily created on housing demolition sites in anticipation of development.

Immediately Available Land: Marketable land that currently has planning permission, is serviced and has no other major constraints to immediate development.

LDP Ref: The reference used in the Local Development Plan, if applicable.

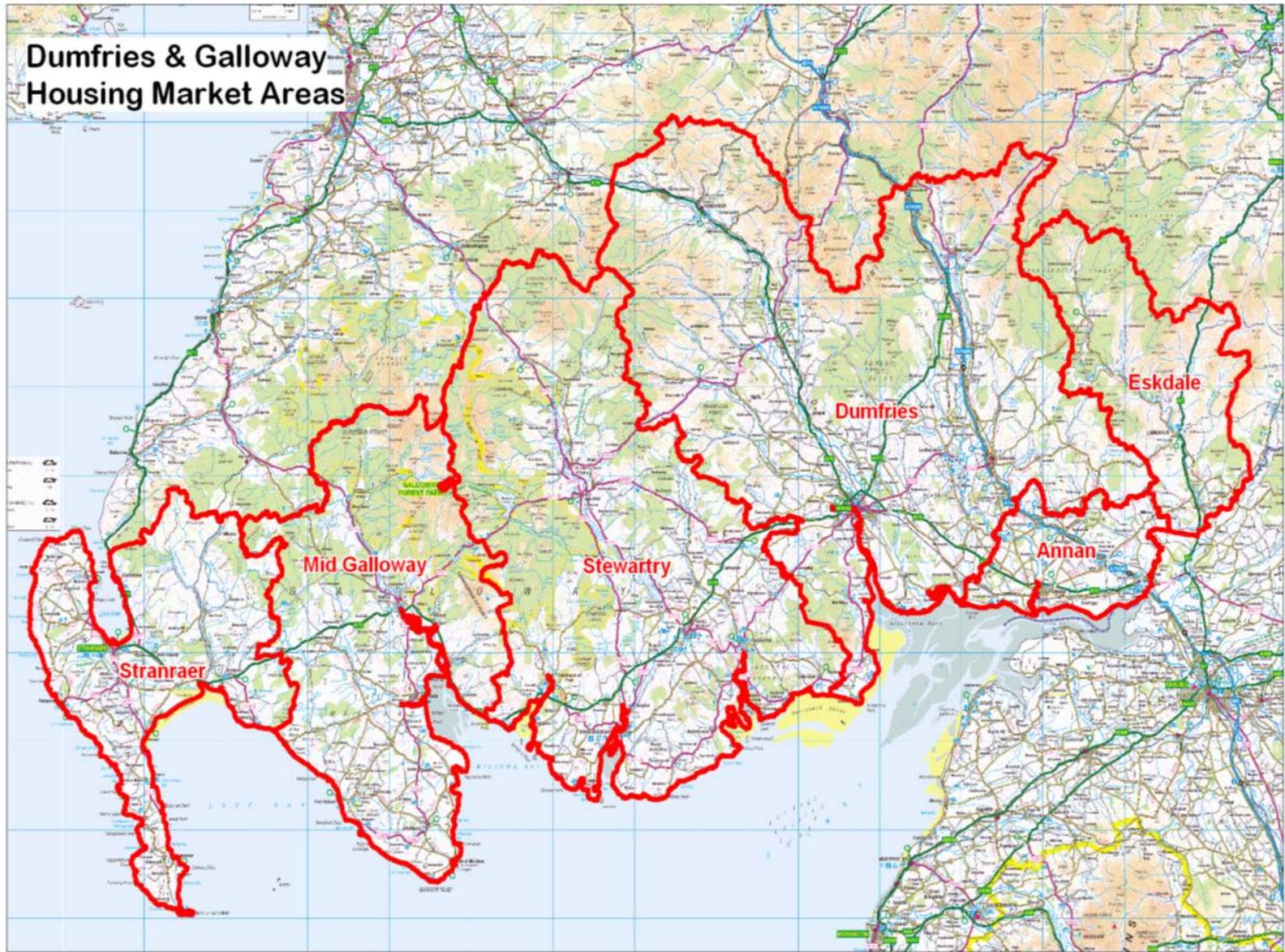
Marketable Land: Is Minor Constrained Land Area + Immediately Available Land Area.

Serviced: The provision of roads and public utilities, including water, gas, electricity and sewage.

Total Area: This is the total employment land supply area that has been allocated for business/industrial/general employment use in the Local Development Plan.

FRA: Flood Risk Assessment.

EPS Survey: European Protected Species Survey.



Appendix 2: Categories of Business and Industry Land Supply

Categories of business and industry land

Total Available Business and Industry Land: This includes all land that has been allocated for business and industry use in the LDP.

Immediately Available: Sites that are serviced (fully or partially) and have no constraints that would prevent the site being developed immediately. Until physical construction commences, even if planning permission has been granted, land is considered available.

Marketable Land: Sites that can be fully/partially or not serviced but have minor constraints which prevent immediate development OR the site has no constraints but is not serviced. It is estimated these sites are likely to be developed within 1-5 years.

Constrained Land: Land that has no extant planning permission, is partially or not serviced, has a major constraint and is unlikely to be developed within 5 years.

Types of Constraints

Constraints can include:

- Inability to obtain planning permission
- Ownership issues (e.g. multiple owners or unwilling sellers)
- Physical constraints including poor infrastructure provision or difficult topography
- Accessibility issues
- Poor service availability to site including water, gas, electricity & drainage
- Ground condition constraints such as flood risk
- Contamination

Appendix 3: Business and Industry Land Supply Summary Table

Settlement	LDP Ref	Site Name	Site Area (ha)	Availability					Comments
				Immediately Available	Marketable (1-5 years)	Constrained (Beyond 5 years)	Taken Up	Under Construction	
A74(M)	A74(M).B&I1	Hangingshaw, Johnstonebridge	20	6.5			4.7	8.8	Greenfield site under private ownership. Owner currently marketing the site with interest from developer. Adjacent to other industrial uses (lorry park). No B&I development planning apps for the site. FRA, contamination and archaeological investigation required with future planning applications.
A74(M)	A74(M).B&I2	Hayfield/Newhope, Kirkpatrick Fleming	26.24			26.24			Greenfield site under joint private ownership. Site is not currently being marketed. Off A74(M) detached from any settlement or industrial site. Requires road access investigation. Archaeological investigation and landscape mitigation with future planning applications.

A74(M)	A74(M).B&I3	Redhouse, Gretna	28.19			28.19			Greenfield site under private ownership. Site is not currently being marketed. Located off A74(M) detached from any settlement or industrial site. Requires road access investigation and FRA.
Chapelcross	CPC.B&I1	Chapelcross North	19.43			19.43			Brownfield site under private ownership. Marketed by LSH with developer interest. A development framework has been prepared and adopted as non-statutory planning guidance to the LDP. Contamination and archaeological investigation, road access investigation, FRA and landscape mitigation required.
Chapelcross	CPC.B&I2	Chapelcross South	7.13			7.13			Brownfield site under private ownership. Marketed by LSH with developer interest. A development framework has been prepared and adopted as non-statutory planning guidance to the LDP. Contamination and archaeological investigation, road access investigation, FRA and landscape mitigation required.

Chapelcross	CPC.B&I3	Chapelcross West	32.37			32.37			Brownfield site under private ownership. Marketed by LSH with developer interest. A development framework has been prepared and adopted as non-statutory planning guidance to the LDP. Contamination and archaeological investigation, road access investigation, FRA and landscape mitigation required.
Eastriggs	ERL.MU1	Stanfield Farm	0.87		0.87				Greenfield site under private ownership. Owner advises developer interest. Located on edge of settlement and unserved. Requires transport assessment.

Ecclefechan	ECC.B&I1	Land adjoining B7076, Jct 19 A74(M),	11		11				Greenfield site under private ownership. No planning applications. Located on edge of settlement and unserviced. Requires masterplan-should set out access arrangements and road improvements, linkages to Ecclefechan, phasing and landscaping.
Gretna	GTN.MU1	former Golf Course	1		1				Greenfield site under private ownership on edge of settlement, unserviced and has minor constraints. Planning application for housing and business units approved subject to completion of a Section 75 obligation. (15/P/4/0277). No other applications for development. Masterplan required.

Dumfries	DFS.B&I1	Heathhall - North of Aviation Museum	9.3		5.8	3.5			Brownfield site under multiple ownership adjacent to existing industry/business uses. Infrastructure app approved (13/P/3/0463). Planning app pending decision (14/P/3/0204) (Molplant Construction). Planning app withdrawn (14/P/3/0231) - proposed animal feed manufacturing facility (applicant: NWF Agriculture). Contamination and archaeological investigation required. EPS survey.
Dumfries	DFS.B&I2	Cargenbridge	12.3	1.72	5.08	5.5			Site under public ownership with two planning app approved (14/P/3/0162) and (14/P/3/0237).
Dumfries	DFS.B&I3	Garroch Loaning (adjacent to existing B&I)	18.97				18.97		Construction of new DGC Hospital complete. (14/P/3/0478) Included in 2016/2017 Audit. Business and Industry land loss.

Dumfries	DFS.B&I4	Heathhall Airfield	7.1		7.1				Brownfield site under public ownership with interest from developer. Site forms natural extension to existing B&I site. Contamination and archaeological investigation required. EPS survey. Noise assessment and road access.
Dumfries	DFS.B&I5	Land South of Dumfries Enterprise Park	5.1	4.65			0.45		Site is partially serviced. Awaiting land ownership confirmation. Site forms natural extension to existing B&I site.
Dumfries	DFS.B&I6	Brasswell	8.42		8.42				Greenfield site under private ownership. No developer interest. Located on outskirts of Dumfries adjacent to other B&I uses and unserviced.
Dumfries	DFS.B&I7	Clumpton Hill	4.5	4.5					Greenfield site under private ownership with developer interest. Located on outskirts of Dumfries adjacent to housing development. Recent upgrade to water supply on site. Requires Drainage Impact assessment.

Dumfries	DFS.TC1	Brooms Road	1.6		1.6				
Kirkconnel	KCN.B&I1	Greystone Avenue	0.7			0.7			Greenfield site under public ownership. Adjacent to existing B&I uses, unserviced. Possible coal survey required.
Lockerbie	LRB.MU1	Land west of ice rink	0.6		0.6				Greenfield site under private ownership with developer interest. Adjacent to existing B&I uses. Requires FRA, roads assessment and masterplan.
Moffat	MOF.MU1	Former Academy	flexible	flexible					Brownfield site under public ownership and is partially serviced. Main Building is Listed. Planning approval 7 February 2018 subject to conditions for flatted accommodation. 16/1514/FUL. 16/1513/LBC.
Moffat	MOF.MU2	Former Woollen Mill	2.43		2.43				Brownfield site under private ownership with developer interest. Site is partially serviced. Requires Masterplan, FRA and contamination investigation.

Sanquhar	SNQ.B&I1	Glasgow Road	3.62		3.62				Greenfield site under private ownership. Adjacent to existing B&I uses. No development planning applications. FRA required and tree protection
Thornhill	THN.MU1	Gallows Knowe	2.6			2.6			Greenfield site under private ownership on outskirts of settlement, unserviced but subject to a masterplan as part of all the proposed sites surrounding it. Developer interest.
Newton Stewart	NST.B&I1	Barnkirk Farm	4.1				4.1		Development of a depot complete (12/P/1/0307). Included in 2016/2017 Audit.
Newton Stewart	NST.MU1	Masonfield	1.5		1.5				Greenfield site under private ownership. Adjacent to existing B&I uses. Masterplan exists but may need review and update.

Whithorn	WTH.B&I1	Stirnie Birnie Bridge	2.8		2.8				Brownfield site under multiple private ownership. No planning applications. FRA, contamination investigation and EPS may be required.
Castle Douglas	CSD.B&I1	land at Oakwell Road	1.4	1.4					Site under private ownership. Adjacent to existing B&I use. FRA required.
Dalbeattie	DBT.B&I1	land at Edingham Industrial Estate	1.25	0.43		0.82			Brownfield site under joint private ownership. Planning permission for Plot A (13/P/2/0260). Adjacent to existing B&I use. site is partially serviced. Archaeological and contamination investigation required.
Stranraer	STR.MU1	Stranraer Waterfront	flexible						Brownfield site under multiple ownership. Subject to Regeneration Strategy.

Stranraer	STR.B&I1	Blackparks Industrial estate	6.7		6.7				Greenfield site under private ownership. Adjacent to existing B&I. FRA, contamination and archaeological investigation required.
Stranraer	STR.B&I2	Clashmahew	9.6		9.6				Brownfield site under joint private ownership. Adjacent to existing B&I. No planning applications as yet. FRA, contamination and archaeological investigation required.
Stranraer	STR.B&I3	Railway Yard	4		4				Brownfield site under joint private ownership. Adjacent to existing B&I. No planning applications as yet. FRA, contamination and archaeological investigation required.
Total 1/04/17- 31/03/18			225.78					8.8	8.8ha U/C A74(M).B&I1 Hangingshaw
Total Effective (IA+Marketable)			97.32						
Total Remaining 31/03/2018			225.78						