

Submission to Cairngorms  
National Park Authority on  
Development Land for  
Commercial and Industrial  
Use

On behalf of:

**Cairngorms National Park Authority  
And Highlands & Islands Enterprise**

Submitted by:

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## Executive Summary

On behalf of Highlands & Island Enterprise and Cairngorms National Park Authority, Ryden LLP have undertaken a review of the supply and demand for development land for commercial and industrial use within the Cairngorms National Park. This report will be used to assist with the allocation of business land within the next Cairngorms National Park Local Development Plan. For the purposes of this report commercial and industrial use is defined within the Town and Country Planning (Use Classes) (Scotland) Order 1997 as land suitable for employment use falling within Use Classes 4 – Office/Business, 5 – General Industrial and 6 – Storage and Distribution.

To assess demand we have completed a range of face to face and telephone interviews with key organisations, employers and public sector agencies with an interest in the park. We have also reviewed existing known requirements for business land. The search has highlighted five confirmed requirements for business land within the park. The total of these requirements are for between 12 and 12½ acres of commercial and industrial land. Two are from sawmills, one in Boat of Garten and one in Dinnet on Deeside. One is from a fabrication company in Grantown-on-Spey, one is from a drinks production company in Aviemore and the other is a clinical research firm based in Kincaig. All five of these requirements could be accommodated through expansion of their existing facilities.

There is anecdotal evidence of demand in a number of settlements in the park for starter business units suitable for office or industrial use. However this is not supported by any firm evidence although it is a commonly held view amongst many of those parties interviewed. This is most likely due to the rural nature of many of these settlements.

This report highlights that there is a total of 337 acres of commercial and industrial land zoned in settlements across the park. Within this we estimate there is currently 28 acres of commercial and industrial land available for development. Our findings show that Ballater, Boat of Garten, Carrbridge, Cromdale and Grantown-on-Spey do not have any development land available. Braemar, Dalwhinnie and Kincaig have small existing supplies that may either be let or sold in the near future. There is supply allocated in both Kingussie and Nethybridge but some of the employment sites allocated suffer from a number of constraints making them either expensive or difficult to develop. The settlements of Aviemore, Blair Atholl, Newtonmore and Tomintoul do have an existing supply of commercial and industrial land but in most cases the remaining supply may not be sufficient for the next Local Plan period.

Our report concludes that there is no evidence of demand for commercial and industrial land within Ballater, Blair Atholl, Braemar, Carrbridge, Cromdale, Dalwhinnie, Nethybridge, Newtonmore or Tomintoul. Of those requirements identified the settlements of Boat of Garten, Grantown-on-Spey and Kincaig have existing known requirements but no supply capable of accommodating them. Aviemore has some available supply.

We have recommended two potential options. Option 1 would be to create strategic commercial and industrial sites for the park. We have set out potential sites on the plans within Appendix 5.0.

Alternatively we have suggested that the settlements are graded as larger, smaller and minor settlements. For larger settlements allocation of 5 – 10 acres of land should be made. For smaller settlements allocation of 2 acres of land should be made and for minor settlements 0.5 – 1 acres of land should be allocated or alternatively favourable planning policy should be drafted whereby any suitable employment proposals are favourably considered. We have set out potential sites in Appendix 5.0.

In summary having the correct amount of business land in the right locations within the park will be a key starting point in positioning the park to allow job creation to assist with economic recovery. However, zoning sites must be carefully considered along with their commercial viability. Ideally commercial and industrial sites should benefit from good transport links, access to labour supply and be cost effective to develop and service. In some cases in rural locations these issues can prevent commercial development.

## **1.0 INTRODUCTION**

### **1.1 Instruction**

1.1.1 Highlands & Islands Enterprise (HIE) and Cairngorms National Park Authority (CNPA) have jointly appointed Property Consultants Ryden LLP to undertake a review of the supply of and demand for development land for commercial and industrial use within the Cairngorms National Park. This report will be used to assist with the allocation of business land within the next Cairngorms National Park Local Development Plan.

1.1.2 For the purposes of this report commercial and industrial use is defined within the Town and Country Planning Use Classes Order (Scotland) 1997 as land suitable for employment use falling within Use Classes 4 (Office/Business), 5 (General Industrial) and 6 (Storage and Distribution).

### **1.2 Cairngorms National Park**

1.2.1 Cairngorms National Park was established in September 2003. It is Britain's largest national park extending to 4,528 km<sup>2</sup> in area being approximately twice the size of Loch Lomond and the Trossachs National Park. The Park contains a unique range of landscape, wildlife and habitats. It is home to four of Scotland's highest mountains and contains the UK's largest area of land above 800 metres in height. Two of Scotland's key rivers the Spey and the Dee have their source within the Cairngorms. We attach a plan showing the Park boundaries in Appendix 1.0.

1.2.2 The National Park is home to over 17,000 people. The largest settlements include Aviemore, Ballater, Grantown-on-Spey, Kingussie and Newtonmore. Smaller settlements include Boat of Garten, Blair Atholl, Braemar, Carrbridge, Cromdale, Dalwhinnie, Kincaig, Nethybridge and Tomintoul. It is estimated 1.4 million people visited the Park in 2007 with 1.1 million of these visiting Badenoch & Strathspey alone. (Source: [www.cairngorms.co.uk](http://www.cairngorms.co.uk)).

1.2.3 The National Park is split into two distinct geographic areas divided by the Cairngorms Mountain Range in the middle. To the South and East lies historic Deeside. The main roads in Deeside are the A93 from Perth via Blairgowrie to Braemar and then East along the River Dee through Ballater and to Aberdeen.

1.2.4 To the North and West of the Cairngorm Mountains lies Strathspey & Badenoch. The main road links are the A9 from Perth in the south passing Blair Atholl, Newtonmore, Kingussie, Aviemore, and Carrbridge on to Inverness. The A95 connects Aviemore to Grantown-on-Spey and down Speyside towards Elgin, Keith and Banff. Strathspey & Badenoch and Deeside are linked via the A939 which crosses from Grantown-on-Spey through Tomintoul and the Lecht Ski Area to Ballater. Just outside the southern end of the park the A924 provides a link from the A9 at Pitlochry to the A93 at Glenshee.

1.2.5 Blair Atholl, Dalwhinnie, Newtonmore, Kingussie, Aviemore and Carrbridge have stations on the main Perth to Inverness rail line.

**2.0 AIMS AND METHODOLOGY**

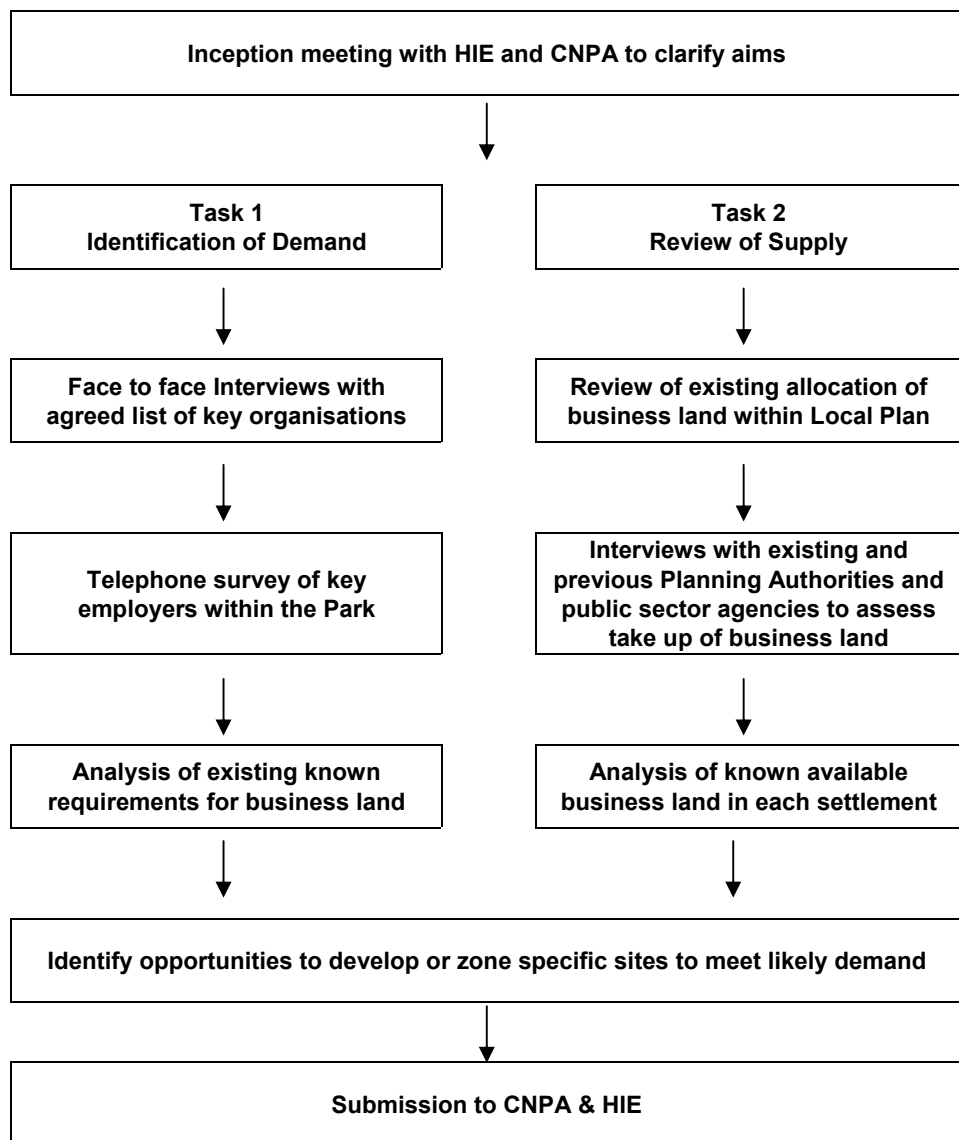
**2.1 Aims**

2.1.1 This report has the following aims:-

- To determine the scale and nature of demand for commercial and industrial sites in the Park.
- To analyse the existing supply of business land within the Park.
- To identify opportunities to develop or zone specific sites to meet any demand identified

**2.2 Research Methodology**

2.2.1 We have utilised the following methodology:-



**2.3 Task 1: Identification of Demand**

2.3.1 Based on our discussions with CNPA and HIE we agreed a list of 5 organisations to complete face to face interviews with. The list is below:

Name	Organisation
Ian Whittaker / Tania Alliod	Cairngorm Mountain Ltd
J P Grant	An Camas Mor Rothiemurchus Estate Office
Alan Rankin, Chief Executive	Cairngorms Chamber of Commerce
Eleanor McFadden, Managing Director	Frontier Science (Scotland) Ltd
Jim Davidson	Macdonald Hotels, Aviemore

The above organisations were identified as having relevant interest in the development of land for commercial and industrial use within the park boundary. Due to adverse weather conditions and time constraints only one of these interviews was completed in person with the other 4 completed as telephone interviews.

2.3.2 We agreed a further list of 41 organisations to complete telephone interviews with. A copy of this list along with the feedback is attached in Appendix 2.0. It comprises a range of private and public sector employers across the park. It was agreed that feedback from these organisations would provide a guide towards demand for commercial and industrial land within the park.

2.3.3 We also agreed to interview 19 key public sector agencies that have involvement within the park area. A copy of this list is attached in Appendix 2.0. This comprises local authorities, SCDI, Highlands & Islands Enterprise, Scottish Enterprise and the local Business Gateways.

2.3.4 To complete our assessment of demand we reviewed existing known requirements for commercial and industrial land contained within our enquiry database.

2.3.5 The findings from our interviews and research stated above are outlined in Section 4.0 of this report.

**2.4 Task 2: Review of the Supply**

- 2.4.1 We reviewed the supply of commercial and industrial land set out within the existing Cairngorms National Park Local Plan dated October 2010 ([www.cairngormsnationalpark.com](http://www.cairngormsnationalpark.com)). Within this we estimated the size of each allocated commercial and industrial site using the Ordnance Survey Promap system. We have broken this down by settlement. We have completed visual inspections of the sites to estimate the remaining capacity of commercial and industrial land that is available in each settlement.
- 2.4.2 Where appropriate, we have listed further commercial property that is being openly marketed within each settlement. The results of our investigations are set out in Appendix 4.0 of this report.
- 2.4.3 Using our estimated figures we have shown the available supply of business land for each settlement in graphs set out in Section 5.0 of this report.
- 2.4.4 We set out our conclusions in Section 6.0 of this report incorporating our recommendations and suggestions on the amount of commercial and industrial land required within the park highlighting potential sites that could be zoned.



### **3.0 ECONOMIC CONTEXT**

#### **3.1 Local Economy**

- 3.1.1 In early 2010 a report was commissioned by CNPA on the Economic and Social Health of the Cairngorms National Park. This was completed by Cogent Strategies International Limited. The report highlights the following summary of the local economy.
- 3.1.2 The Cairngorms National Park is one of the most sparsely populated parts of the United Kingdom and is currently home to some 17,200 people. The park's population is on average much older than elsewhere in Scotland. As with other rural areas the park is experiencing large scale out migration of older teenagers in pursuit of education and a wider range of opportunities. The overall population of the park has increased almost 5% since designation and projections suggest it will reach 20,000 people by 2040. At present more than 250 people come to the park than leave each year with most of these new residents being of working age ranging from their 20's to 50's
- 3.1.3 There are a total of 11,500 people economically active in the park. Of these 9,000 are employed with around 2,000 being self-employed. Two thirds of all jobs are in private sector services including retailing and tourism. One in six people are employed in the public sector which is a smaller share than national averages whilst goods producing industries such as manufacturing, agriculture and construction also account for one in six jobs. Over the past 10 years the most expansion in jobs has taken place in tourism related industries with some in the financial and business services, including call centres. Most people who live in the park also work within its boundaries. It is estimated around 1,800 people who are resident in the park work elsewhere mainly in and around the cities of Inverness and Aberdeen. Remoteness from these large centres of population means that the Cairngorms is not and is unlikely to become a dormitory suburb. About 1,500 jobs in the park are filled by in commuters many of whom come from the Inverness area or from areas just outwith the park's boundaries. Despite the current recession unemployment levels in the park are at a historically low level and at a rate much lower than the Scottish National average.
- 3.1.4 The structure of the Cairngorms economy is highly unusual with a distinctive mix of industries contributing to the area's creation of wealth, compared to elsewhere in the country, whisky production, forest products specifically sawmilling, harvesting and forest production and agriculture are particularly distinctive, and the area includes the most tourism focused parts of Scotland.
- 3.1.5 A number of clusters of competitive industries in the park are identified. These are tourism, whisky and drinks, forestry, food and agriculture, publishing and music, other production and manufacturing, home ownership and construction, public administration, health and education and other services.

- 3.1.6 The park lacks large local government offices and major health care or post secondary education facilities and has traditionally had a small public sector. Land based industries are an important generator of wealth for the park and an important employer. Food and agriculture provides a living for 900 people. The importance of the whiskey and drinks cluster is shrinking but is still an important part of local culture and heritage. The forest and forest products cluster is growing in importance and diversity as the plantations mature.
- 3.1.7 Most businesses operating in the park are small with over two thirds of work places having fewer than 5 staff. The number of work places in the park is now over 1,000, a rise of 13% since designation.
- 3.1.8 The Cairngorms is also home to a small number of significant manufacturing operations. Their main trading links are usually with organisations outwith the park and they tend to be either long established organisations which have diversified into new fields or they have located in the area thanks to the high quality natural environment. A number of these businesses work in relation to the off shore oil and gas industries.
- 3.1.9 The report highlights there is some evidence that the park is becoming an attractive base for foot loose sophisticated industries. They highlight a cluster of creative media knowledge based businesses in the report. It also acknowledges that the Cairngorms Mountain Range forms a physical barrier to transport and communications between communities. The main north south artery of the A9 and main rail line are key communication links. Telecommunications meet basic standards but wireless coverage and the penetration in band width or wired communications are on the agenda for improvement (Source: Report by CogentSI on the economic and social health of the Cairngorms National Park, 2010).

### **3.2 Property Market Conditions - Nationally**

- 3.2.1 Nationally prime commercial property investment prices rebounded in 2009 and continued to rise into 2010. However occupier demand in most locations remains subdued and development activity is curtailed by the lack of debt finance available. Scottish investment Capital Values fell by 42% in the two years from June 2007 to June 2009. Rental growth held up until September 2008 then also turned negative. Retail rents have continued to fall however office rents have stabilised and industrial rents are growing again. Capital Values increased by 15% between the market drop off in Quarter 2 2009 to Quarter 2 2010 so this means around one third of lost value since 2007 has now been recovered.
- 3.2.2 Prime commercial property has been attracting purchaser competition for the best assets particularly from institutional investors. Secondary assets are still however affected by significant price discounting. According to IPD recent price improvements have been fractional. Occupational market recovery is now critical to continued investment performance as is the refinancing by 2013 of £160 billion of loans outstanding to the particular indebted commercial real estate sector. Despite the reasonable performance of the prime investment market a dearth of debt finance and weak occupational markets have curtailed new development and diminished commercial land values.

- 3.2.3 The outlook for the commercial property market is to remain vulnerable in 2011 and to gradually stabilise in late 2011 into 2012. Weak occupier demand is reducing rents but a lack of new development will put a floor under most market sectors and position these for recovery as economic growth resumes and unemployment peaks. The timing and strength of this market recovery will vary significantly between sectors and locations. There are risks that faltering consumer expenditure growth and major public sector cuts will delay this recovery. We expect the development sector to remobilise in late 2012 as the economy stabilises.

### **3.3 Property Market Conditions - Locally**

- 3.3.1 Historically the property market within many of the settlements within the park operated very much on a local scale. This remains the case in many of the smaller settlements where local businesses with their own contacts and knowledge will conclude transactions and buy commercial premises or land. Whilst many of the issues highlighted in Section 3.2 will undoubtedly affect the local property market, local factors will take precedence.
- 3.3.2 Undoubtedly the lack of available bank finance is constraining businesses' ability to purchase commercial property or land and also to expand. In general cash rich businesses are seeing opportunities to take advantages of lower capital values if they have sufficient funds available.
- 3.3.3 Sections 4.0 and 5.0 of this report set out a detailed review of demand as well as supply of commercial and industrial land for each settlement within the park.

#### **4.0 DEMAND FOR BUSINESS LAND**

##### **4.1 Results of Interviews**

4.1.1 We set out below the key findings from the five face to face interviews.

4.1.2 We spoke with Tania Alliod of Cairngorm Mountain Ltd. They are a key employer with the Mountain Railway and Ski Centre being major tourist attractions. They have no immediate plans for any commercial development and have no requirement for commercial property within the park. In the medium term they may consider creating a down hill mountain biking facility at Corrie Na Ciste. They would potentially consider taking some marketing or advertising shop space within Aviemore itself to encourage tourists to visit the mountain.

4.1.3 We completed an interview with J P Grant owner of Rothiemurchus Estate. He explained that the Estate have proposals to create a new settlement to the east of Aviemore across the River Spey called An Camas Mor. A copy of the proposed Master Plan is attached in Appendix 4.0. Access would be from the existing B970 Coylumbridge to Nethybridge road. Planning permission in principle containing a number of conditions was granted for the proposal in June 2010. The Master Plan will be submitted to Cairngorms National Park Authority in due course. They intend to create a sustainable new community with up to 1500 homes. This will be phased over 25 to 40 years. The development is located in woodland with the vision being for a small community comprising a mixture of low, medium and high density housing. The focal point of the development will be a traditional high street with shop units on the ground floor with residential above. The intention would be for the high street to grow as required. The proposed Master Plan will not provide for any traditional commercial and industrial land to be zoned rather the developers are proposing that the shop units along the ground floor of the High Street could be used as commercial space both for retail or Class 4 Office Use. There is no provision in the Master Plan for industrial buildings or accommodation.

They expect 20% of the population to work from home with the remainder of the community expected to work mainly on the high street. It is estimated that the high street could eventually be up to 1 kilometre long with individual shops having depth of up to 30 metres. In some cases this depth could be increased to 50 metres. They acknowledge the commercial pressure on Aviemore and have highlighted that Aviemore is a key economic driver for the National Park. In their view the town has been developed in an unplanned way, with its major assets being strong public transport links, the railway station as well as access to Cairngorm Mountain. It is envisaged that An Camas Mor will offset some of the pressure on Aviemore. They have already successfully relocated an office occupier from Edinburgh into an existing estate building to accommodate approximately 10 staff.

Mr Grant confirmed the following general observations on the National Park. Tourism is a large employer and is a key industry but crucially staff need to live close to their place of work and the lack of affordable housing is a constraint on the economy. According to research undertaken by An Camas Mor the current economy is based on low wages, low education and there is a lack of retention of higher value jobs with many local people leaving to complete higher education and not returning. In order to improve the local area it will be important to attract graduates and high quality jobs back into the area. A key element of this would be providing affordable housing. In his view Aviemore is a forward looking community. The potential lifestyle in the area is a competitive edge but must be used to attract business. In his experience there are many people who live in the area who work further afield in industries such as finance or oil and gas. They do so as they recognise the benefits of the lifestyle. It is aided by excellent state education and sports facilities in the local area.

- 4.1.4 Despite a number of attempts it was not possible to interview Alan Rankin, Chief Executive of Cairngorms Chamber of Commerce.
- 4.1.5 We interviewed Eleanor McFadden, Managing Director of Frontier Science (Scotland) Limited who are based in Kincaig. Frontier Science are a not for profit company recognised as a charity. They are experienced in the management of clinical trials and statistical analysis. They own their existing property in Kincaig. This was a former station building. They currently have 19 staff and a need to expand. They have submitted a planning application to build an extension but this has proved problematic. Any consent granted for an extension would likely be conditional on the building reverting to residential use in the future. They would like to remain in Kincaig or the immediate surrounding area. They acknowledge their facility is expanding and finding suitable premises is a constraint. They have created high value jobs and are a good example of a valuable occupier who has chosen to locate within the park.
- 4.1.6 We interviewed Jim Davidson of Macdonald Hotels. He confirmed that Macdonald Hotels now control Aviemore Highland Resort. They have recently sold a site for the development of affordable housing. They have also sold land to Tesco for the construction of a new supermarket adjacent to Grampian Road. They would consider selling other land for commercial development. They have no immediate development plans themselves for the site.

## **4.2 Results of Telephone Interviews**

- 4.2.1 We attach at Appendix 2.0 feedback from the 41 telephone interviews completed with key public and private sector employers as well as feedback from the 19 key public sector agencies interviewed. We set out at the end of Section 4.0 requirements identified for commercial and industrial land within the park.
- 4.2.2 In summary, the interviews with key public sector agencies have failed to confirm any requirements for commercial and industrial land within the park. Aberdeenshire Council did provide an example where Duncans of Deeside who were a bakery based in Finzean just outside the boundary of the park have relocated to Laurencekirk as there were no suitable sites available within the Deeside area. The Highland Council also confirmed that they have experience of companies who were unable to find space in the Newtonmore and Kingussie areas who have relocated to Forres and Inverness. Unfortunately they were unable to confirm the company names.

## **4.3 Review of Existing Known Requirements**

- 4.3.1 Due to the largely local nature of the property market there are often very few publicised market requirements to acquire commercial or industrial land within the park. We have reviewed our own enquiry database and note that Wolseley UK Limited have an existing requirement for a 4,000 ft<sup>2</sup> trade counter unit to supply building materials to the Aviemore area. We are not aware of any other active requirements for commercial or industrial land within the park at this time.
- 4.3.3 In our various discussions with organisations and employers within the park there is anecdotal evidence of demand for a business centre within Strathspey & Badenoch. Commonly people confirm that they know of companies that work from home who require small flexible office space but due to the lack of such accommodation they are forced to work from home. Given the scale of most of these businesses they are more likely to undertake any search for space using their own local knowledge so there is limited evidence of definite requirements.

## **4.4 Trends Likely to Influence Demand**

- 4.4.1 We interviewed Guy Walker, Development Manager for International Businesses at Highlands & Islands Enterprise. He believes there is an increased trend of people working from home. He provided a DVD showing an overview of this trend across the Highlands and Islands. Shop Direct who operate the Littlewoods Catalogue are an example of an employer who take on staff who can work remotely from home, subject to them having suitable internet connection. The call centre operator Vertex also recently ran a pilot scheme in Easter Ross taking on 12 staff working from home to service a contract for Westminster City Council. HIE believe this is a growing trend that will continue across the Highland area. The key criteria for being able to work from home is access to good broadband connection.
- 4.4.2 Whilst this trend on its own is unlikely to create demand for additional commercial and industrial land it may lead to a reduction in the number of requirements for call centres to be developed if companies continue with a policy of allowing staff to work from home. There is a risk that infrastructure constraints in terms of broadband connections and speed may prevent or limit working from home in certain rural areas.

4.4.3 Based on the report provided by CogentSI on the economic and social health of the Cairngorms National Park they have shown that the park has a growing population of working age and a growing number of small businesses, mainly employing less than 5 people. These trends are likely to generate demand for small flexible commercial accommodation that can be used both as office accommodation or industrial space. The challenges in securing bank funding are making it difficult for the private sector to undertake speculative development of commercial property. Assuming these constraints continue in settlements where there is already a shortage of supply of suitable property there is unlikely to be any speculative development to accommodate demand.

**4.5 Summary of Demand**

4.5.1 We set out below requirements for commercial and industrial land that have been highlighted through the face to face interviews, telephone interviews and our research.

Company	Requirement	Estimated Requirement Size	Location
Cairngorm Brewery Aviemore	They are currently building an extension and would consider relocating to a larger facility to give them further growth potential. Ideally they would remain where they are and buy adjoining properties.	1 to 2 Acres for 20,000 ft <sup>2</sup> building	Ideally Aviemore
BSW Sawmills Boat of Garten	The existing sawmill is based in Boat of Garten. This company would like to expand and buy adjoining land but this is proving expensive due to the cost of upgrading the access road. It is understood they are in discussions with HIE on this.	2 to 4 Acres	Ideally Boat of Garten
Mackellar Sub-Sea Grantown-on-Spey	This company have a requirement to expand their existing finishing facility. Ideally they would like to buy the adjoining Council owned small industrial units. Alternatively they may have to relocate to a larger site.	1 to 2 Acres	Ideally Grantown-on-Spey
James Jones & Sons Ltd	This sawmill is located in Dinnet near Aboyne. The company require expansion space and would ideally like to purchase or lease land next to the existing sawmill. They believe their current site has a 10 year life expectancy. If a suitable relocation option came up they would be interested to know. However they expect the infrastructure costs associated with relocation to be high.	2 to 4 Acres	Within Deeside
Frontier Science	This company have a possible requirement for office space to accommodate their exiting 19 staff plus provide expansion potential. They have submitted a Planning Application to extend their existing building in Kinraig but if this is unsuccessful they may have a requirement to relocate.	Assume 0.2 acre site to accommodate a building of 3,000 ft <sup>2</sup> to 4,000 ft <sup>2</sup> plus car parking	Kinraig
		<b>Total: 12 to 12.5 Acres</b>	

- 4.5.2 Our research has highlighted five genuine requirements for commercial and industrial land within the park. Two of these are from sawmills, one in Boat of Garten and one in Dinnet on Deeside. One is from a fabrication company based in Grantown-on-Spey, one from a drink production company in Aviemore and the other is a clinical research firm based in Kincaig. In total there are requirements for between 12 to 12.5 acres of commercial and industrial land. All five of these requirements could be accommodated through expansions of their existing facilities.
- 4.5.3 Whilst our research provides a robust analysis of current demand from existing occupiers in the park it is impossible to accurately assess potential demand from footloose national companies or employers who may consider locating within the park boundaries. In particular there is a focus on developing the renewable energy sector within Scotland. The Scottish Government have identified a number of strategic sites across the country that could be utilised for storage manufacturing and shipping of equipment in connection with both tidal and wind energy. If suitable business land was available within the park boundaries there may be an opportunity to attract employers to locate within the park. However it is likely these companies will want to be close to their market place and also closer to port facilities for any goods or materials that require shipping by sea.
- 4.5.4 There may be a case to allocate strategic commercial and industrial sites close to good transport links and centres of population to attract footloose national requirements. Assuming these sites are fully serviced and ready for development they could be promoted to attract inward investment.



**5.0 SUPPLY OF COMMERCIAL AND INDUSTRIAL LAND**

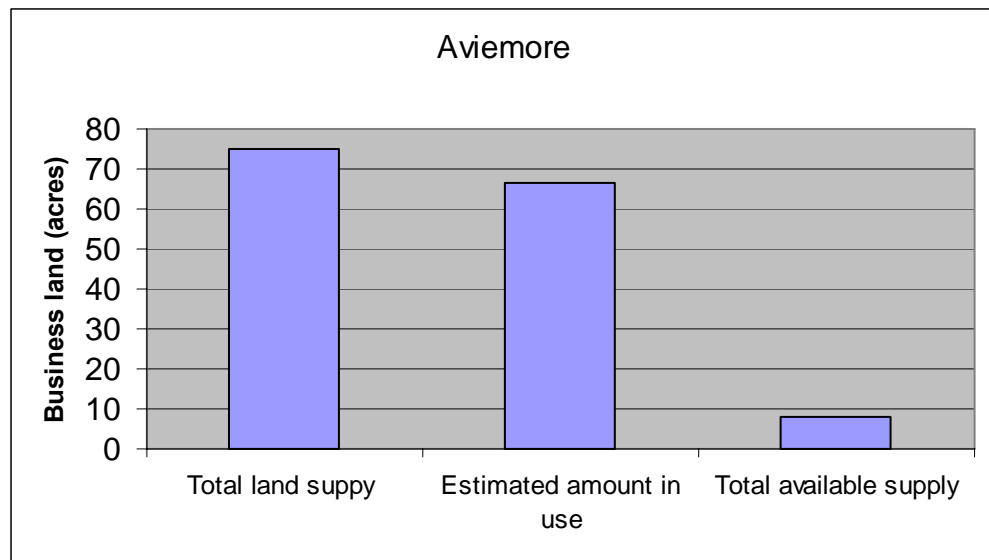
**5.1 Review of Existing Allocation within the Local Plan**

5.1.1 We have reviewed the existing allocations of commercial and industrial land for each settlement as shown within the Cairngorms National Park Local Plan October 2010. We have visually inspected all of these sites. We attach tables in Appendix 4.0 split into settlements with comments on any available commercial or industrial land. We have estimated the total site areas using the Ordnance Survey Promap system. We have subjectively assessed the remaining supply of land based on our inspections. These figures have been used to calculate the total available supply of commercial and industrial land for each settlement within the park. In addition, within Appendix 4.0 we have added details of commercial properties that are currently available within each settlement to give a wider picture of current supply.

**5.2 Supply in Each Settlement**

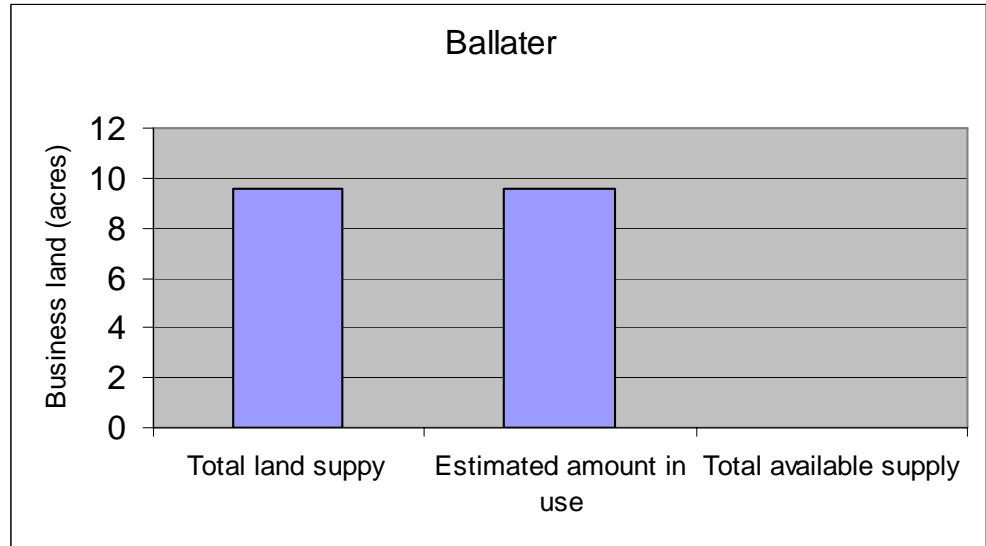
5.2.1 We set out below graphs showing the existing supply and availability of commercial and industrial land within each of the settlements.

**5.2.2 Aviemore**



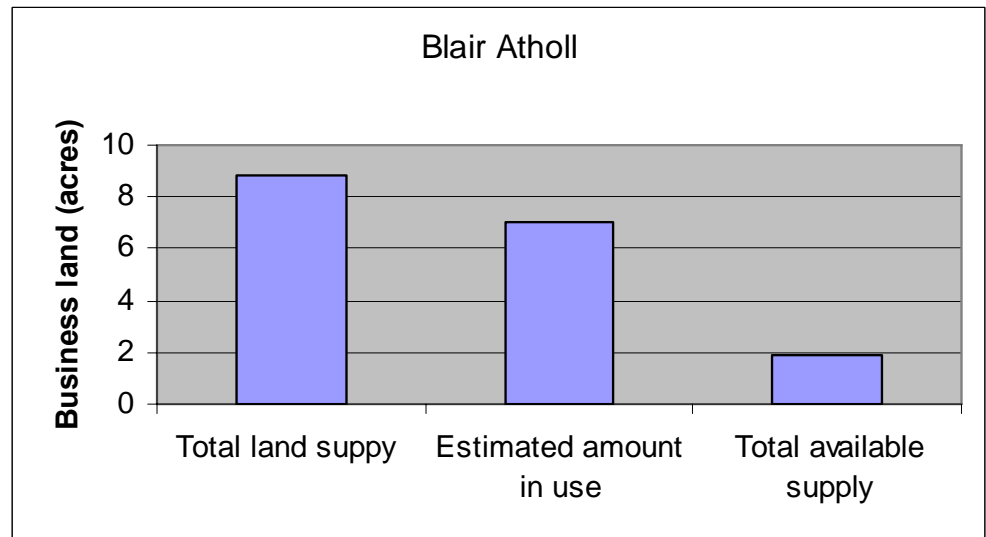
5.2.3 We estimate there is 8.24 acres of commercial and industrial land available for development. This excludes any of the additional commercial buildings listed in Appendix 4.0. The bulk of this land is contained within Cairngorms Technology Park and the allocation of commercial land in the former Aviemore Highland Resort Master Plan. Both sites would seem to be capable of development subject to suitable infrastructure being available.

5.2.4 **Ballater**



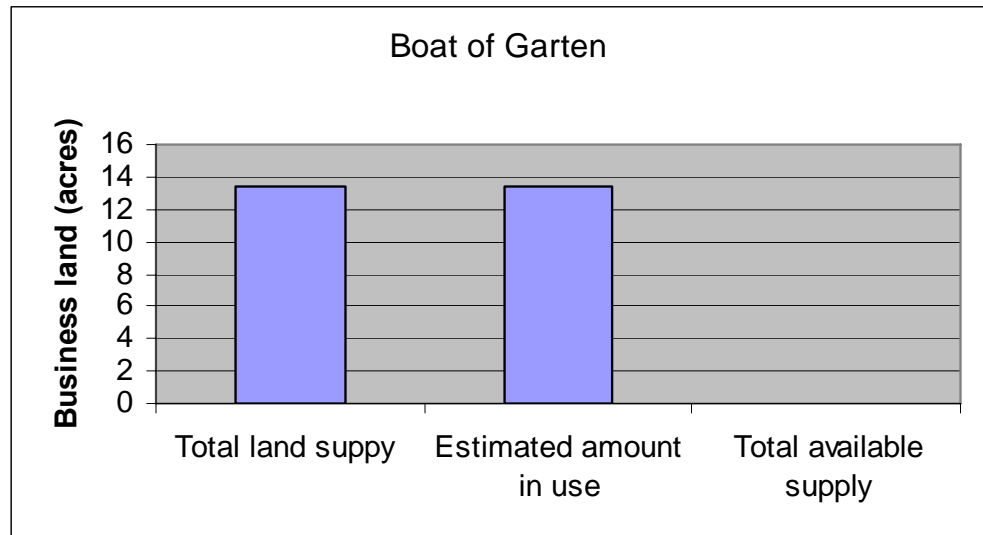
5.2.5 There is currently no commercial or industrial land available in Ballater.

5.2.6 **Blair Atholl**



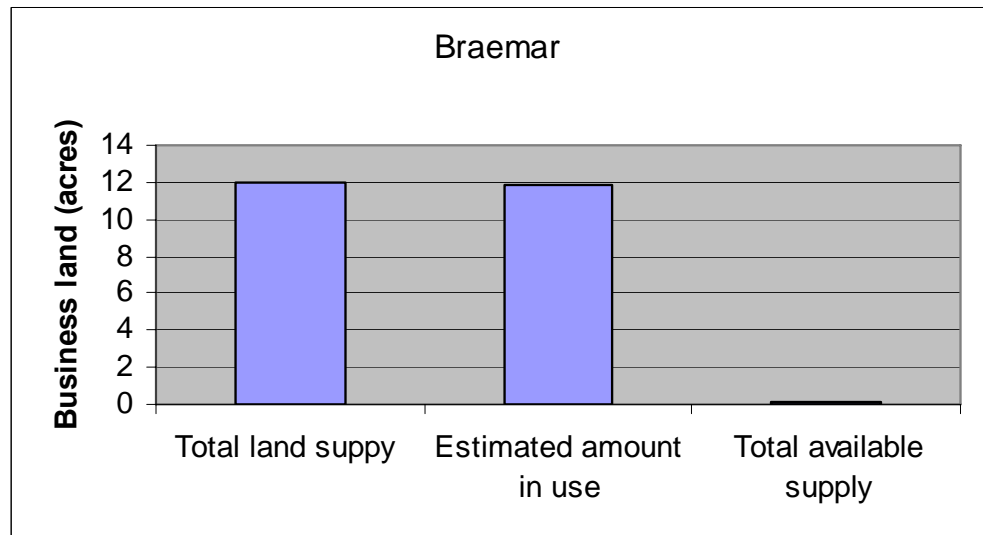
5.2.7 We estimate there is currently 1.67 acres of commercial and industrial land available in Blair Atholl. This is all contained within the former sawmill yard.

5.2.8 **Boat of Garten**



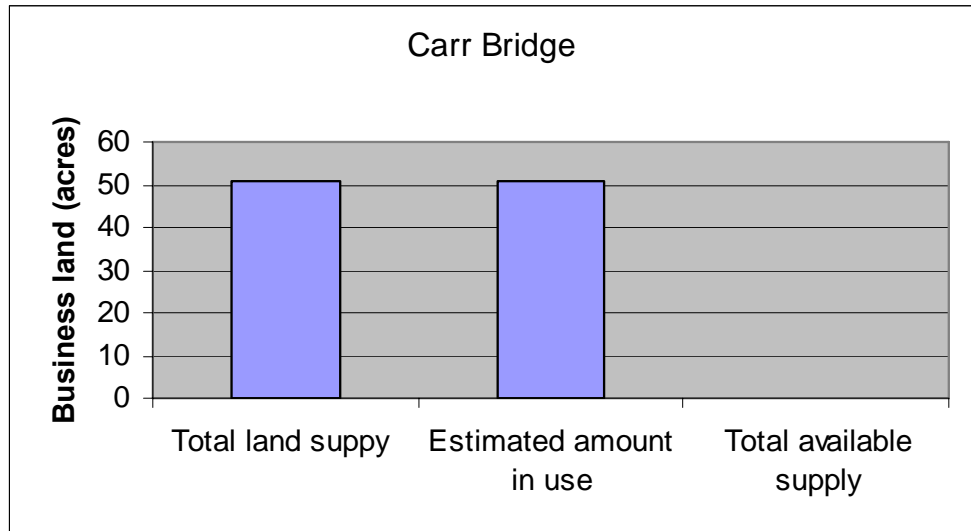
5.2.9 There is no available commercial or industrial land within Boat of Garten.

5.2.10 **Braemar**



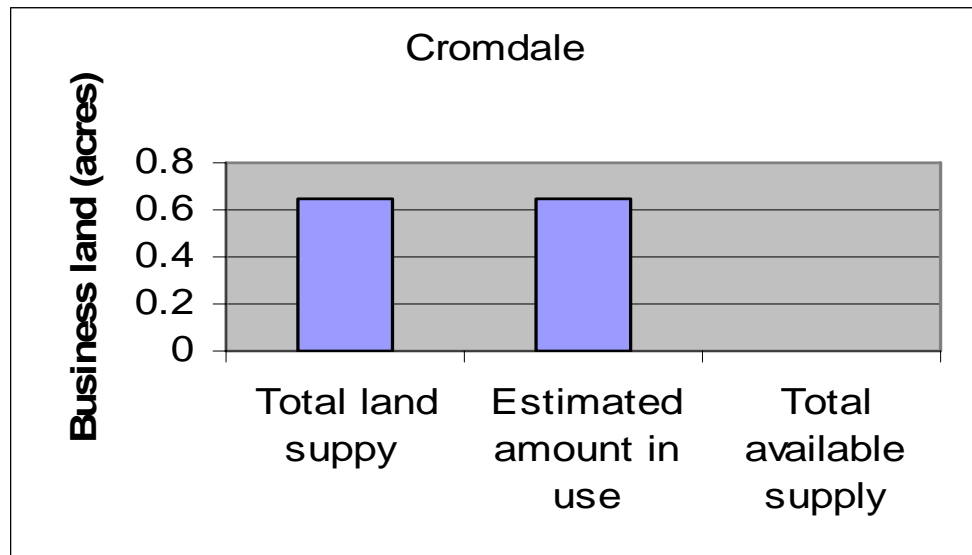
5.2.11 We estimate there is 0.725 acres of commercial or industrial land available within Braemar. This comprises the former Council Depot on Castleton Place.

5.2.12 **Carrbridge**



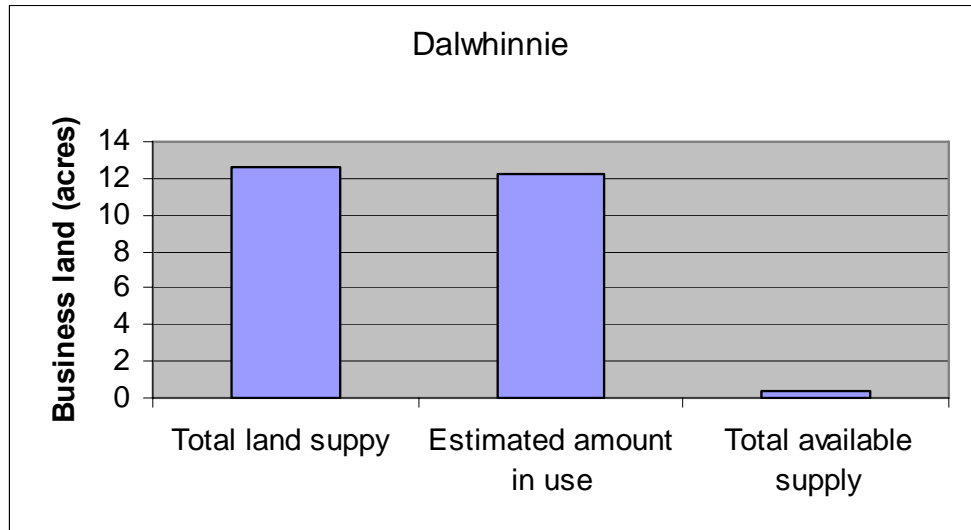
5.2.13 There is no available commercial or industrial land within Carrbridge.

5.2.14 **Cromdale**



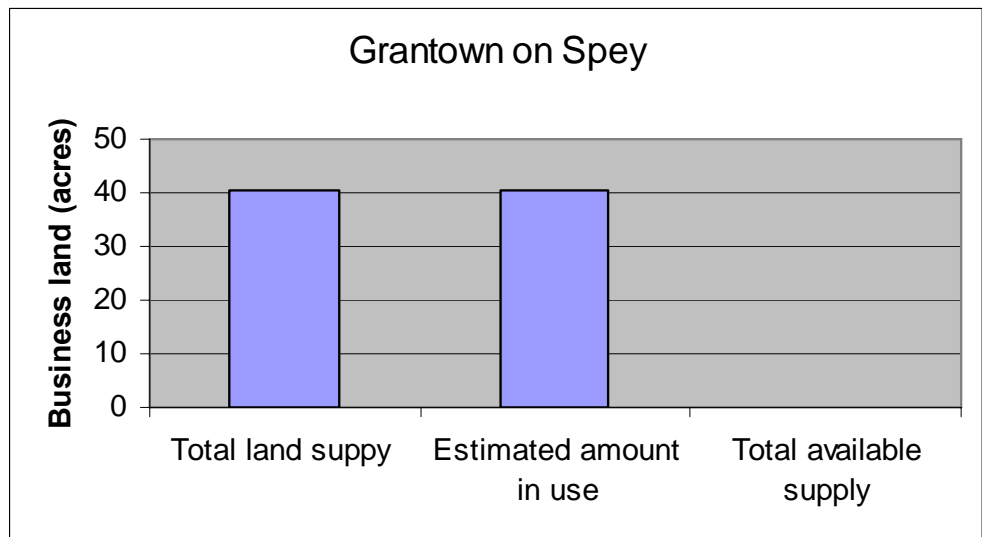
5.2.15 There is no available commercial or industrial land within Cromdale.

5.2.16 **Dalwhinnie**



5.2.17 We estimate there is 0.39 acres of commercial or industrial land currently available within Dalwhinnie. This is land close to the Lochailort Hotel.

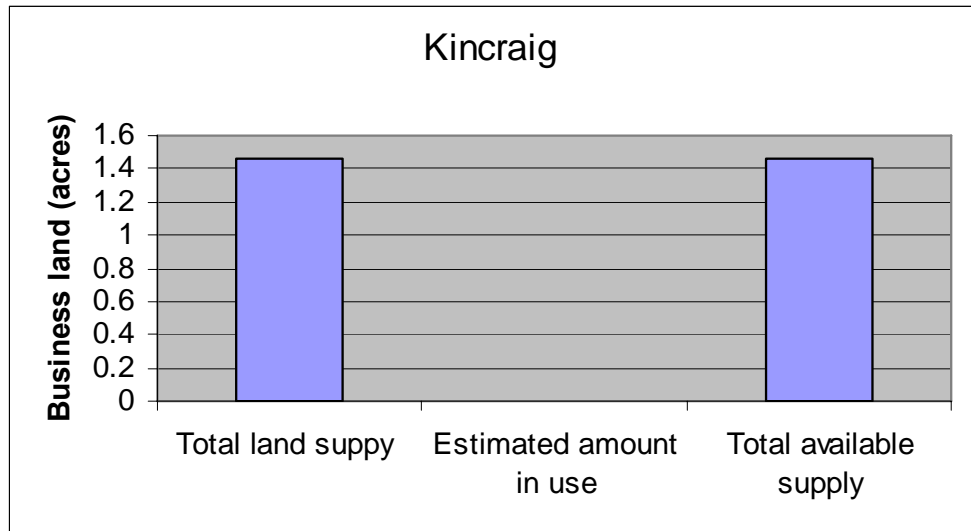
5.2.18 **Grantown-on-Spey**



5.2.19 We estimate there is no available commercial or industrial land within Grantown-on-Spey. Achnagonalin Industrial Estate was developed by Highlands & Islands Enterprise to provide serviced plots of land for commercial or industrial use. Two of the vacant plots have been purchased by owner occupiers with the last remaining vacant plot under offer for sale to an occupier. Assuming those owners build out the plots this will leave no land available on the estate. A private developer has constructed a terrace of 5 small industrial units on one plot of land within the estate. These extend to approx. 1,200 sq ft each that are all available to lease at rentals of £7,200 per annum (equating to £6 sq ft).

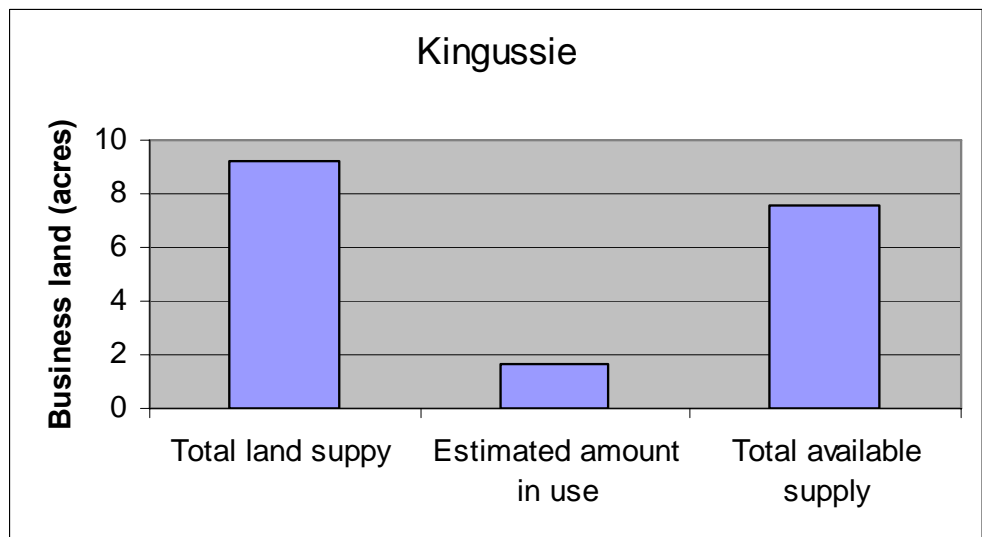
A private developer, Willburn Homes is marketing a site within Strathspey Industrial Estate for the development of 4 eco office pods extending between 1,000 and 2,000 sq ft each. No pods have been constructed but they are available for sale or lease.

5.2.20 **Kincraig**



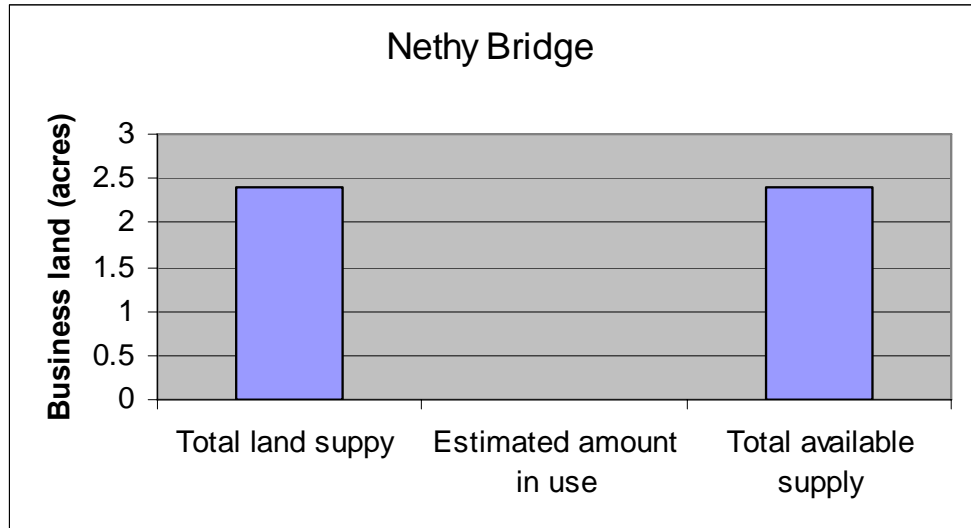
5.2.21 We estimate there is currently 1.46 acres of commercial and industrial land available in Kincraig. This is all located at Baldow Smiddy. Alvie Estate have advised us that they may potentially have a use for the vacant warehouse building plus the land. Therefore the site may become occupied in the near future.

5.2.22 **Kingussie**



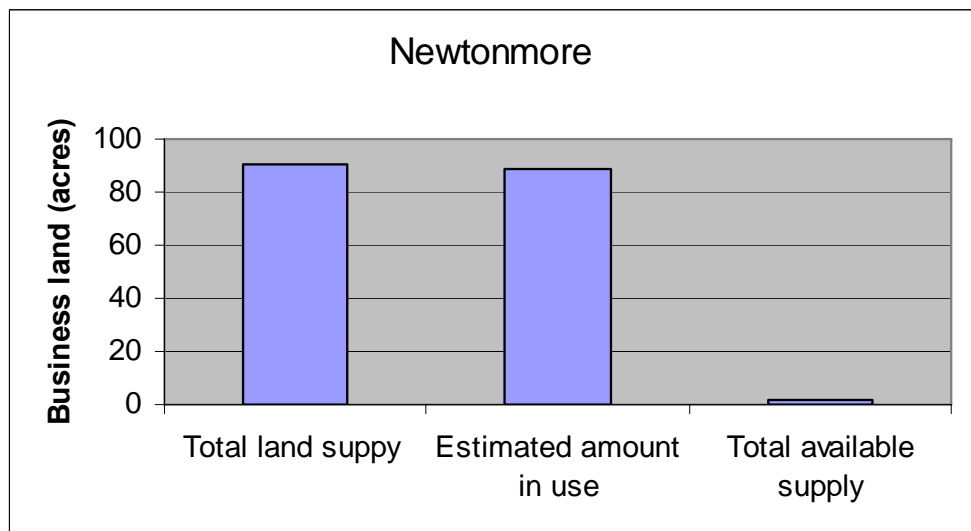
5.2.23 We estimate that there is 7.55 acres of commercial or industrial land available within Kingussie. This comprises land at Spey Street next to the former Highland Folk Museum. Part of this site is a public car park with mature trees at the side. It would seem to be capable of development. The majority of the available land is located at the eastern edge of the town next to the A9. This site is steep and covered in trees making it expensive and challenging to develop.

5.2.24 **Nethybridge**



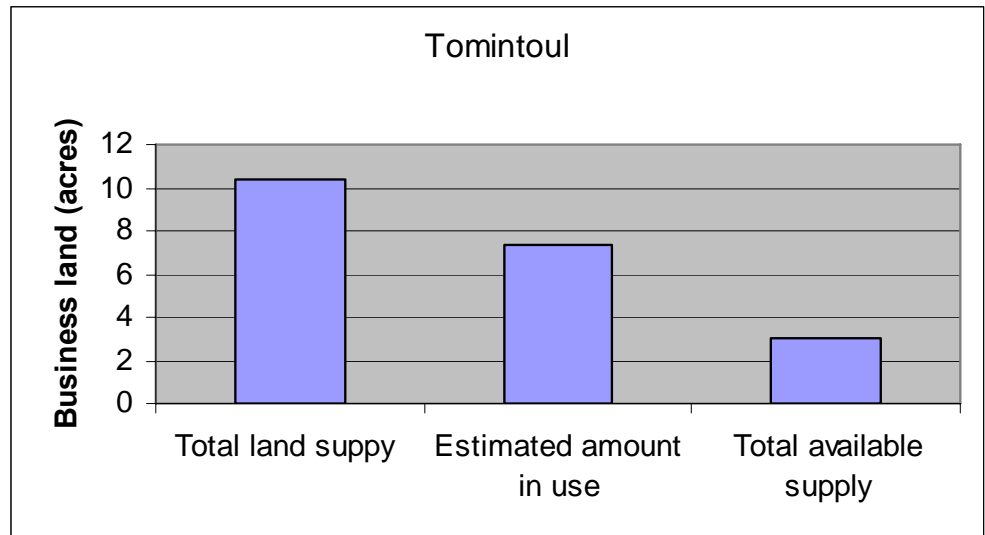
5.2.25 We estimate there is 2.41 acres of commercial or industrial land available within Nethybridge. This is all combined within a heavily wooded site on the eastern edge of the village.

5.2.26 **Newtonmore**



5.2.27 We estimate there is 1.7 acres of available commercial and industrial land in Newtonmore. This is all located to the side of the existing transport café on the western edge of the town.

5.2.28 **Tomintoul**



5.2.29 We estimate there is 3 acres of commercial and industrial land available in Tomintoul. This is all contained within land owned by the Crown Estate to the north east of The Square on the edge of the village.



### **5.3 Analysis of Historic Take Up of Business Land**

- 5.3.1 We interviewed Economic Development and Planning contacts at each of the five Councils who formally dealt with land within the Cairngorms National Park area. None of the Councils interviewed had historic take up figures for commercial and industrial land within the areas covered by the park boundaries. No historic information on take up rates was available for this report. The Highland Council did provide a copy of a list of vacant and derelict sites within Strathspey & Badenoch taken from the Scottish Land Vacant and Derelict Land Survey. None of these sites were deemed to be suitable for commercial development of any scale.
- 5.3.2 Generally the views of the Council staff interviewed, was that there is limited demand for commercial or industrial land within the park. The Highland Council who own Newtonmore Industrial Estate and a small industrial estate in Grantown-on-Spey confirmed both estates were full with no vacancies. In Highland Council's experience there is competition from small businesses for these units and good demand. Contrastingly, the Crown Estate have who have developed 3 industrial units in Tomintoul have found these challenging to let with it taking over 2 years to find tenants and the rentals having to be significantly reduced. Individual units are now let at rentals of £1,200 per annum. The Crown Estate would not develop any additional units within the town as they perceive there to be no demand.
- 5.3.3 Of the 4 Business Gateways officers contacted, none of them thought they had significant knowledge to provide views on the supply or demand for commercial or industrial land within the park.
- 5.3.4 Based on our interviews with both key employers and key public sector contacts there is a perception within the business community that there is not enough suitable commercial or industrial land within the settlements in the park. This view is particularly strong for the larger settlements of Grantown-on-Spey, Aviemore and Kingussie/Newtonmore.

#### 5.4 Summary of Supply

5.4.1 In summary, there is currently 337 acres of commercial and industrial land zoned in settlements across the park. We estimate there is currently 28 acres of commercial and industrial land available for development. The graphs we have provided in Section 4.0 provide a breakdown for each settlement. We set out a summary table below.

Settlement	Total Land Supply	Estimated Amount In Use	Total Available Supply
Aviemore	74.81	66.57	8.24
Ballater	9.53	9.53	0
Blair Atholl	8.87	7	1.87
Boat of Garten	13.35	13.35	0
Braemar	11.95	11.875	0.075
Carrbridge	50.94	50.94	0
Cromdale	0.65	0.65	0
Dalwhinnie	12.62	12.23	0.39
Grantown-on-Spey	40.49	40.49	0
Kincraig	1.46	0	1.46
Kingussie	9.2	0	9.2
Nethybridge	2.4	0	2.4
Newtonmore	90.4	89	1.4
Tomintoul	10.33	7.33	3
<b>TOTALS:</b>	<b>337.00</b>	<b>308.965</b>	<b>28.035</b>

5.4.2 We have highlighted in red those settlements with no available commercial or industrial land.

5.4.3 Those settlements highlighted in yellow either have sites zoned that may be let shortly, or are very small offering limited capacity.

5.4.4 Those settlements highlighted in green have some sites zoned that may be difficult or expensive to develop due to topography, tree cover or access restrictions. Sites ED1 and part of ED2 behind the railway line in Kingussie are examples. Site ED1 in Nethybridge is another example.

## **6.0 SUMMARY AND CONCLUSIONS**

### **6.1 Demand**

6.1.1 This report has adopted a number of proactive techniques to assess the scale and nature of demand for commercial and industrial land across the Cairngorms National Park. We have concluded that the five companies listed in Section 4.5 of this report have active requirements for commercial and industrial land totalling 12 to 12.5 acres.

6.1.2 We have been unable to identify any demand for commercial or industrial land within the following settlements:-

- Ballater
- Blair Atholl
- Braemar
- Carrbridge
- Cromdale
- Dalwhinnie
- Nethybridge
- Newtonmore
- Tomintoul

6.1.3 Whilst our research has shown limited demand in the settlements listed above there is anecdotal evidence of demand from a number of those parties interviewed. There is a commonly held view that there is demand particularly for small start up business units that can be used as office or light industrial accommodation. This is supported by the experience of Tulliemet Ltd who developed 14 small business units on the site of the former Blair Atholl sawmill. Units range from 500 sq ft to 1500 sq ft and are let at rentals of £4.75 sq ft. These were built speculatively with limited evidence of demand but are now fully let to a range of local businesses and contractors. This contrasts markedly with the experience of the Crown Estate who developed a terrace of three small business units in Tomintoul and found these difficult to let. The first terrace is being used for storage and took over two years to let at discounted rentals. As a consequence a proposed second terrace has not been constructed. The proximity to a main trunk road such as the A9 may be a factor in making the Blair Atholl development more successful but other elements such as the size, design, yard provision and rental cost of the units may also have had an impact on their lettable.

### **6.2 Supply**

6.2.1 Our assessment of the current supply of commercial and industrial land has shown that out of the 337 acres of land allocated for this use across the park there is a supply of 28 acres available.

We set out a table below showing known requirements listed against current supply in each settlement.

Settlement	Total Land Supply	Estimated Amount In Use	Total Available Supply	Known Requirement (Acres)
Aviemore	74.81	66.57	8.24	1 to 2
Ballater	9.53	9.53	0	0
Blair Atholl	8.87	7	1.87	0
Boat of Garten	13.35	13.35	0	2 to 4
Braemar	11.95	11.88	0.075	0
Carrbridge	50.94	50.94	0	0
Cromdale	0.65	0.65	0	0
Dalwhinnie	12.62	12.23	0.39	0
Grantown-on-Spey	40.49	40.49	0	1 to 2
Kincraig	1.46	0	1.46	Poss. 0.2
Kingussie	9.2	0	9.2	Poss. 0.2
Nethybridge	2.4	0	2.4	0
Newtonmore	90.4	89	1.4	0
Tomintoul	10.33	7.33	3	0
<b>TOTALS:</b>	<b>337.00</b>	<b>308.965</b>	<b>28.035</b>	<b>8.2 **</b>

\*\* This does not include the 2 to 4 acre requirement from James Jones & Sons Ltd to extend their sawmill in Dinnet near Aboyne. They could potentially be moved within Deeside.

6.2.2 We have highlighted in red on the table above settlements where there is current demand but no available supply.

### 6.3 Opportunities to Zone Specific Sites to meet Demand

6.3.1 Our investigations have confirmed that there are no historic take up figures on which to base future projections of demand. Given the rural nature of many of these settlements it is difficult to find comparisons. Ryden recently completed a report for Dumfries & Galloway Council on the supply of employment land. Based on this Dumfries & Galloway Council have decided to create strategic employment sites close to the M74 motorway and concentrate the provision of supply next to this key road link.

6.3.2 Given the constraints we would propose two potential options to zone further business land within the National Park.

#### Option 1

CNPA could adopt a similar approach to Dumfries & Galloway Council and identify and zone strategic commercial and industrial sites across the park. It may be possible to identify one strategically important site in the Deeside area as well as one or two in the Strathspey & Badenoch area. For example a strategic site could be created next to Ballater in Deeside on the eastern edge of the town as you enter along the main road from Aberdeen. Equally a strategic industrial site could be created in either Grantown-on-Spey, Aviemore or Kingussie/Newtonmore in proximity to the railway line and the A9. Ideally strategic sites should be a minimum of 10 to 15 acres to accommodate up to 200,000 ft<sup>2</sup> of buildings.

It is difficult to identify potential sites in Grantown-on-Spey or Aviemore. The existing Achnagonalin Industrial Estate, Grantown-on-Spey could be extended. Aviemore does have land at Cairngorm Technology Park but ideally a new business site should be identified most likely to the north of the town along the A95. Given the uncertainty surrounding the Aviemore Highland Resort there may be an opportunity for the supply of business land within this development to be increased. There may also be an opportunity for commercial and industrial land to be zoned within the Master Plan for the An Camas Mor development. Whilst there are no plans at this time this development could provide future options particularly for mixed employment opportunities. Both developments could potentially provide suitable commercial and industrial land serving Aviemore. In Kingussie/Newtonmore a strategic site could be created either at the eastern or western edges of Kingussie or the western edge of Newtonmore. We attach plans in Appendix 5.0 showing possible locations for strategic sites hatched in red marked with an 'S' in each of the settlements highlighted above.

### **Option 2**

Alternatively a suitable supply of business land could be zoned in each of the settlements. Given the absence of historic take up figures we recommend the following allocations are considered for the settlements.

- Larger settlements including Aviemore, Grantown-on-Spey, Kingussie/Newtonmore and Ballater – zone 5 – 10 acres of commercial and industrial land. This is based on an assumed take up of 1 – 2 acres per annum capable of accommodating 20,000 ft<sup>2</sup> to 40,000 ft<sup>2</sup> of buildings based on a ratio of 40% site cover. The plans attached in Appendix 5.0 highlight potential sites in the settlements noted above. These are hatched in red and marked with the letters 'ED'. In some cases these sites could also be strategic sites.
- Smaller settlements including Braemar, Tomintoul, Boat of Garten, Carrbridge and Blair Atholl – zone 2 acres of commercial and industrial land. This is based on an assumed take up of 0.4 acres per annum capable of accommodating commercial buildings of up to 8,000 ft<sup>2</sup> based on a ratio of 40% site cover. Tomintoul and Blair Atholl have capacity. We attach plans in Appendix 5.0 highlighting potential sites in Braemar, Boat of Garten and Carrbridge. These are hatched in red and marked with the letters 'ED.'
- For minor settlements including Nethybridge, Kincaig, Dalwhinnie and Cromdale – zone 0.5 to 1 acres of commercial and industrial land. This is based on an assumed take up of 0.2 acres per annum equating to 2,000 ft<sup>2</sup> to 4,000 ft<sup>2</sup> per annum based on a ratio of 40% site cover. Nethybridge and Kincaig have capacity. Dalwhinnie has some. We attach plans in Appendix 5.0 highlighting potential sites in Cromdale and Dalwhinnie. These are hatched in red and marked with the letters 'ED.'

It may be possible in the case of smaller and minor settlements not to zone any specific commercial and industrial land but rather have a Planning Policy drafted that if any suitable proposals come forward they will be favourably considered. In particular this may suit minor settlements.

These figures are not based on any evidence of take up rates. They are subjective and based on our experience of take up in other locations across Scotland. We recommend that the take up figures are then assessed on a five yearly basis so that future supply can be modified accordingly.

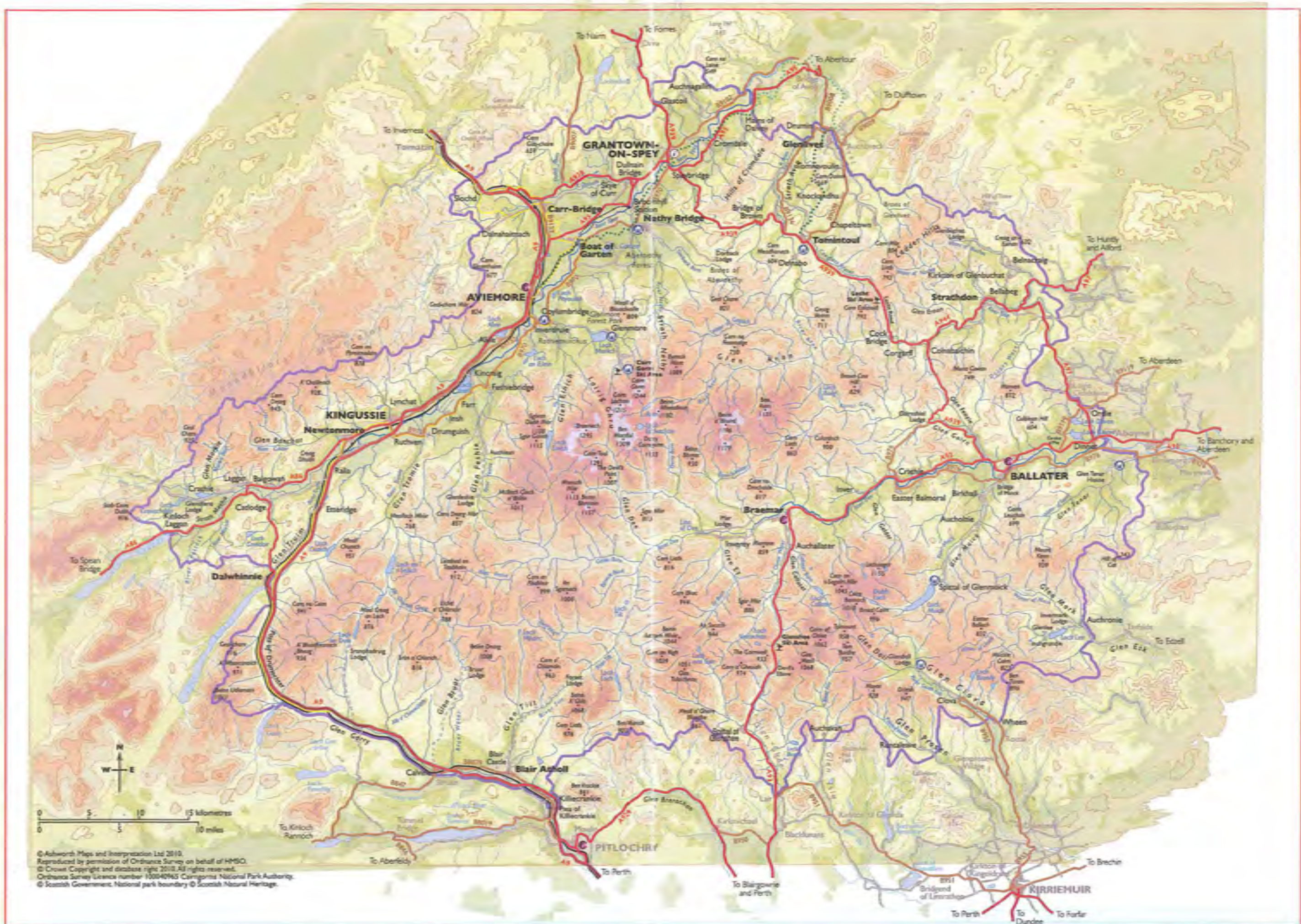
#### **6.4 Summary**

- 6.4.1 Having the correct amount of business land in the right locations within the park will be a key starting point in positioning the park to allow job creation to assist with economic recovery. However, zoning sites must be carefully considered along with their commercial viability. Ideally commercial or industrial sites should benefit from good transport links, access to labour supply and be cost effective to develop and service. In some cases in rural locations these issues can prevent commercial development.
  
- 6.4.2 Given the unique economy in the park , its increasing population, particularly of working age, there is undoubtedly a need to have cost effective viable development land, certainly in the larger settlements across the park. Undoubtedly the Cairngorms National Park has a very strong brand that can be used to its advantage to attract businesses. Zoning the correct amount of business land will hopefully be the first step in the process to achieving this.

**APPENDIX 1.0**

**CAIRNGORMS NATIONAL PARK**

**BOUNDARY PLAN**



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## **APPENDIX 2.0**

### **TELEPHONE INTERVIEW LISTS**

- 1. Key Public and Private Sector Employers**
- 2. Key Public Sector Agencies**

## Telephone Interview List: Key Private and Public Sector Employers

Company Name	Address	Property Occupied Address	Contact	Comments from Telephone Conversations
Scottish Natural Heritage	Per Property Section Great Glen House Leachkin Road Inverness IV3 8NW	Offices Achantoul Granish Aviemore PH22 1AD	Graham Boyle Property Officer	SNH as a whole are not looking for any further space at the moment but are looking at reducing their estate and consolidating where possible. They would consider forming partnerships with other environmental agencies where they could share office property.
Hydrasun Ltd	2 Pittodrie Lane Aberdeen AB24 5QW	Factory Myrtlefield Industrial Estate Aviemore PH22 1SB	Robin Rigby Manager	This company have been based in the same premises for over 30 years. Their site/building is adequate for current use and also allows for future expansion. Robin feels that Aviemore Industrial Estates are all fully occupied and his view is that there should be more land allocated as there is demand. A friend of his who had a business in Newtonmore was looking to take space in Aviemore or Kincaig recently but could not find space. He ended up moving to Forres where he took space with a similar manufacturing company. Robin also mentioned that he feels one difficulty with being located within the National Park area especially as a manufacturer is the location and costs of transportation.
Scottish Sports Council Trust Company	Caledonia House South Gyle Edinburgh EH12 9DQ	Sports Centre Glenmore Lodge Aviemore PH22 1QU	John Armstrong	Their site at Glenmore Lodge is spread over 5 acres providing climbing walls, gymnasium and leisure facilities including shooting range, rolling pool and mountain bike track. They have lodges/chalets that are let out all year as well as staff houses. They also offer conferencing facilities. They are planning a new climbing wall but this will be built within their current site. They are not looking to expand outwith their current site. John's view is that there is a demand for small business units in Aviemore and Grantown. There is a shortage of storage space at the right price particularly in Aviemore. They have equipment which they would like to store inside but due to the high costs they have just stored outside.

## Telephone Interview List: Key Private and Public Sector Employers

Telecom Service Centres Ltd	Per Matheson Chartered Surveyors 22 Forth Street Edinburgh EH1 3LH	Offices Spey House Cairngorm Technology Park Dalfaber Drive Aviemore PH22 1ST	Manager	Advised their property is fine at the moment. They have no plans to expand on site or anywhere else. No views on subject and not aware of any other local requirements.
The Cairngorm Brewery Co Ltd	Unit 12 Dalfaber Industrial Estate Dalfaber Drive Aviemore PH22 1ST	Brewery Unit 12 Dalfaber Industrial Estate Dalfaber Drive Aviemore PH22 1ST	S Faircliffe Manager	They confirmed that their existing building is too small and they are constrained by the limitations of their existing site and a neighbouring telecoms mast. They would like to see the creation of a food and drink hub but they acknowledged it would be too much upheaval and costly for them to move the brewery again. They are in the process of building an extension to their existing building and will remain where they are.  They mentioned that they are aware the Old Village Hall in Boat of Garten may be coming to the market for sale and may be suitable for business use. This has lain dormant since August 2007.
NHS Highland	Estates Department 1 The Square Craig Dunain Inverness IV3 8PQ	Offices 100 Grampian Road Aviemore PH22 1RH	Helen Emery Property Manager	They have confirmed that they have a new health centre in Aviemore and are selling some land close to this for the development of a new school. They also have old hospitals in Kingussie and Grantown. They have no immediate requirements for space but had suggested in the long term there may be the opportunity to consolidate into one larger facility serving Strathspey & Badenoch. Potentially the old hospitals in Kingussie and Grantown could be converted to business use. This would all be subject to funding.
John Gordon & Son Ltd	Balblair Road Nairn IV12 5LT	Sawmill Carrbridge PH23 3AA	David Gibb	They are not looking to expand and have no additional requirement for space now or in the near future. Looking further ahead, if they do expand it is likely they will look outwith the National Park area closer to Nairn or perhaps Forres. Their main sawmill is in Nairn.

## Telephone Interview List: Key Private and Public Sector Employers

Robin Lambie	Mid Mains Elgin IV30 5PU	Shop Ralia Gateway Centre Ralia Newtonmore PH20 1BD	Robin Lambie Manager	They are looking to expand their business and have enquired about the neighbouring Countryside Ranger's Station. The Council have confirmed this is not available. Their view is there is not enough business or tourism related land within the National Park. In their opinion it is very difficult for small businesses to get established and to find property. They would encourage any assistance to provide property for start up businesses.
Inverness Catering Equipment Ltd	Unit 2B Railway Station Ruthven Road Kingussie PH21 1HF	Factory Unit 2B Railway Station Ruthven Road Kingussie PH21 1HF	Manager	No plans for expansion at the moment or near future. The unit they occupy in Kingussie is used purely as a store. No general views and not aware of any requirements. Inverness is the main base for their business.
Angus Reid-Evans T/A Spey Building & Joinery Ltd	Railway Station Ruthven Road Kingussie PH21 1HF	Factory Railway Station Ruthven Road Kingussie PH21 1HF	Stewart Swam	Spey Building occupy a large workshop and site which serves them well and they also have 3 tenants within their building as the space is too large for them alone. They are not looking for any new space. His view is that Kingussie has sufficient space for current demand.
Craig Ireland T/A Cairngorm Smokehouse	Alvie Estate Kincaig Kingussie PH21 1NE	Smokehouse Alvie Estate Kincaig Kingussie PH21 1NE	Craig Ireland	This company have advised they are pretty much tied to the trout farm location on Alvie Estate and all licenses, etc relate to their current site. They are not looking to move. They did look at expanding their smokehouse facilities 2 years ago to Newtonmore. But due to impracticalities including the traveling distance from the trout farm they did not pursue.
Dalwhinnie Distillery	Dalwhinnie Distillery Dalwhinnie PH19 1AB	Dalwhinnie Distillery Dalwhinnie PH19 1AB	Ewan MacKintosh	The distillery infrastructure producing the whiskey is at capacity but they are not looking to expand this side of the business at the moment. They have scope for expansion on the visitor side of things reconfiguring the visitor car park, etc. There is plenty space within their current site for this.

## Telephone Interview List: Key Private and Public Sector Employers

Alvie Estate	Estate Office Alvie Kincraig Kingussie PH21 1NE	Alvie Estate Estate Office Alvie Kincraig Kingussie PH21 1NE	Office Manager	Any future development would be done within the estate and nothing planned at the moment.
Russwood Ltd	Plot 5 Industrial Estate Station Road Newtonmore	Timber Treatment Plant Station Road Newtonmore PH20 1AR	John Russell	They occupy a large site which used to be a coal merchant's yard. This has allowed them to develop the sawmill, a planing mill and office space and there is space for expansion should they need it. They know of a business that works from home who require office space in Kingussie.
BSW Sawmills	BSW Sawmills (Boat of Garten) Corronich Sawmill Boat of Garten PH24 3BG	Sawmill Corronich Boat of Garten PH24 3BG	David Mills	This company have plans to expand onto the adjacent site in the near future. They have advised there are planning and access issues as the road into the site comes off the A95 and due to heavy lorry traffic the Planning Department have confirmed the road would have to be upgraded which is expensive. We understand this company have raised this with HIE and may be looking for assistance. They confirmed that they do not have a view on the availability of business land elsewhere as they focus on their own business.
McLeod Building Ltd	78 High Street Grantown-on-Spey PH26 3EL	78 High Street Grantown-on-Spey PH26 3EL	Manager	This company have no plans to expand their business. They have generally commented that all contractors are struggling.
Colin Lawson (Builders) Ltd	Workshop Site 9 Achnagonalin Ind Estate Grantown-on-Spey PH26 3TA	Workshop Site 9 Achnagonalin Ind Estate Grantown-on-Spey PH26 3TA	Colin Lawson	This company moved into their existing premises 2 years ago and they have no requirement to expand. Current slow down in the construction industry has affected their business. In their opinion demand for commercial space is low at the moment due to the economic climate.

## Telephone Interview List: Key Private and Public Sector Employers

A W Laing Ltd	110 High Street Grantown-on-Spey PH26 3EL	110 High Street Grantown-on-Spey PH26 3EL	Mr Laing Director	This company was not willing to answer any questions.
MacKellar Sub-Sea (Grantown-on-Spey) Ltd	Strathspey Industrial Estate Grantown-on-Spey PH26 3NB	Workshop Strathspey Industrial Estate Grantown-on-Spey PH26 3NB	D MacKellar	This company have a requirement to expand their finishing facility. Ideally they would like to remain within Strathspey Industrial Estate but this is restrictive as they are bounded by the railway station and 4-5 small Council owned units. This company would ideally like to purchase the Council units and expand onto this space subject to these being moved. In their opinion both Strathspey Industrial Estate and Achnagonalin Industrial Estate are at capacity. They are aware there has been a new development of a terrace of 5 industrial units on Achnagonalin Industrial Estate but these are the wrong size. In their opinion there is demand for smaller business units or alternatively larger sites for single occupiers such as themselves but there is no demand for in between sizes. They think current lack of supply is a constraint and they are keen for new land to be zoned within Grantown-on-Spey.
Landmark Press Ltd	Station Road Carrbridge PH23 3AP	Warehouse Station Road Carrbridge PH23 3AP	Office Manager	They expanded their business approximately 1 year ago and have no immediate requirements for any additional space.
Raymond Miller Ltd	Meat Plant Strathspey Industrial Estate Grantown-on-Spey PH26 3JZ	Meat Plant Strathspey Industrial Estate Grantown-on-Spey PH26 3JZ	Sandy Milne Managing Director	Attempted to speak to this company on several occasions but unable to get Sandy Milne.
K & M Falconer Game Dealers (Simpson Game)	Newtonmore Industrial Estate Newtonmore PH20 1AL	Newtonmore Industrial Estate Newtonmore PH20 1AL	Manager	This company was not willing to answer any questions.

## Telephone Interview List: Key Private and Public Sector Employers

Macdonald Hotels (Aviemore Highland Resort)	Aviemore Highland Resort Ltd Administration Building Aviemore Centre Aviemore PH22 1PN	MacDonald Aviemore Highland Resort Aviemore PH22 1PN	J Davidson	This company currently controls the Aviemore Highland Resort. They have recently agreed to sell part of the site for affordable housing. They have also sold land to Tesco for the construction of a new superstore. Their current Master Plan shows residential development, business space expansion of the existing hotel and the development of more retail space. They are willing to consider selling land.
House of Bruar	House of Bruar Blair Atholl Perthshire PH18 5TW	House of Bruar Blair Atholl Perthshire PH18 5TW	Store Manager	This company would not like to disclose their intentions. They have recently expanded their existing facility at Blair Atholl and it is understood they would consider opening other similar facilities.
Glenshee Ski Centre	Glenshee Ski Centre Cairnwell Braemar Aberdeenshire AB35 5XU	Glenshee Ski Centre Cairnwell Braemar Aberdeenshire AB35 5XU	Manager	The Ski Centre has planning permission for a new chairlift that will be installed in Spring 2011. They have no plans for any expansion of commercial space however their business is dependent on the ski season.
Deeside Water Company Ltd	The Stables Ballater Aberdeenshire AB35 5SJ	The Stables Ballater Aberdeenshire AB35 5SJ	Martin Simpson	This company has no requirements to expand.
Speyside Glenlivet Water Company	Braes of Glenlivet Ballindalloch Banffshire AB37 9JS	Braes of Glenlivet Ballindalloch Banffshire AB37 9JS	Paul Wheeldon	This company have no requirements to expand, $\frac{3}{4}$ of their existing site being undeveloped. They highlighted that poor broadband connection and the lack of access to a rail container facility was a constraint for their business. They highlighted that food and drink companies are active within the National Park and should be supported.

## Telephone Interview List: Key Private and Public Sector Employers

Balmoral Estate	The Estate Office Balmoral Estates Ballater Aberdeenshire AB35 5TB	The Estate Office Balmoral Estates Ballater Aberdeenshire AB35 5TB	Manager	They have no expansion plans at present. No requirements for commercial land.
Hilton Craigendarroch Hotel	Braemar Road Ballater Aberdeenshire AB35 5XA	Braemar Road Ballater Aberdeenshire AB35 5XA	Paul Leitch Manager	Hilton Craigendarroch have no plans to expand at present and this is not intended to change in the future.
Tomintoul Distillery	Tomintoul Distillery Ballindalloch Banffshire AB37 9AQ	Tomintoul Distillery Ballindalloch Banffshire AB37 9AQ	Manager	They have no plans for expansion. They did consider expanding 3 years ago but these plans were cancelled due to the slow down in the economy.
Lecht Ski Centre	Lecht Ski Centre Strathdon Aberdeenshire AB36 8YP	Lecht Ski Centre Strathdon Aberdeenshire AB36 8YP	Manager	This company has no requirements to expand.
Dee Valley Confectioners	Dee Valley Confectioners Station Square Ballater Aberdeenshire AB35 5RB	Dee Valley Confectioners Station Square Ballater Aberdeenshire AB35 5RB		This company has no plans to expand at present.
Blair Atholl Estate	Blair Atholl Pitlochry Perthshire PH18 5TW	Atholl Estate Blair Atholl Pitlochry PH18 5TH	Andrew Booth	<p>The estate experiences a good demand for business space, this has decreased slightly in the last few years with the recession.</p> <p>They are currently working on the Local Development Plan process to promote land for development.</p> <p>The estate receives enquiries for business space. At present all of the estate's units are fully let. They find that when there is a void it is filled quickly. They experience no problems letting space.</p>



## Telephone Interview List: Key Private and Public Sector Employers

				<p>In terms of development they would only develop a hand full of units at one time and drip these into the market.</p> <p>The type of businesses locating in the estate area are small 2 – 20 people business who locate there to be in proximity to their client base or because it is centrally located.</p> <p>A concern is the availability of broadband.</p>
James Jones & Son Ltd	James Jones & Son Ltd Timber Merchants Broomage Avenue Larbert Stirling FK5 4NQ	Sawmill Burnroot Dinnet Aboyne AB34 5PN		<p>The sawmill at Burnfoot is quite tight for space. It is nestled between the river and the road. Expansion in the Aboyne direction is limited and so is expansion north. The land is owned by the Glentannar estate. Should they want to expand there is a field adjacent to their site which could be used.</p> <p>The current site has all the infrastructure they require; should they wish to expand and be unable to do so at Burnfoot they would relocate but it would need to be within a 100 mile radius.</p> <p>The site at Burnfoot has a 10 year life expectancy.</p> <p>If the right location for relocation came up they would be interested to know about it.</p> <p>The cost of relocation would be in the region of £24-30million.</p> <p>Believes that Local Plans for the area needs to be more relaxed in terms of business space to allow companies to locate in the right areas for them.</p>

## Telephone Interview List: Key Private and Public Sector Employers

Glen Tanar Estate	Glen Tanar Estate Brooks House Glen Tanar Aboyne Aberdeenshire AB34 4EU	Glen Tanar Estate Brooks House Glen Tanar Aboyne Aberdeenshire AB34 4EU	Michael Bruce	Attempted to speak to this estate on several occasions but unable to get a response.
Invercauld Estate	Invercauld Estate The Estate Office 4 The Keiloch Invercauld Braemar Ballater Aberdeenshire AB35 5TW	Invercauld Estate The Estate Office 4 The Keiloch Invercauld Braemar Ballater Aberdeenshire AB35 5TW	Simon Blackett	Attempted to speak to this estate on several occasions but unable to get a response.
Speyside Handicapped Holiday Trust	Badaguish Outdoor Centre Aviemore PH22 1QU	Badaguish Outdoor Centre Aviemore PH22 1QU	Andrew MacKenzie	They provide holiday lodges and an Activity Centre for disabled people. They are expanding and are in discussions with the Forestry Commission to take extra land within Glenmore Forest Park. This will provide sufficient facilities for them meaning they will have no further expansion plans.
Simpson & Co	Rosebank Cromdale Grantown-on-Spey PH26 3IN	Rosebank Cromdale Grantown-on-Spey PH26 3LN	Mr Simpson	This company e-mailed us to confirm that they would like to give us the same as the National Park has given to them which is nothing.
Thain Electrical	Grampian Road Aviemore PH22 1RH	Grampian Road Aviemore PH22 1RH	Manager	This company currently lease 2 units, one in Kingussie and a shop on Grampian Road in Aviemore. Their opinion is that there is a lack of supply of business units particularly for small companies and the space that is available is expensive. They are aware of a number of similar businesses particularly in Grantown, Aviemore, Kingussie and Newtonmore who cannot find premises. They would like to see additional starter business units developed in these towns to accommodate the demand.

**Telephone Interview List: Key Private and Public Sector Employers**

Loch Insh Water Sports Centre	Kincaig Kingussie Inverness-shire PH21 1NU	Kincaig Kingussie Inverness-shire PH21 1NU	Clive Threshwater	This company have unsuccessfully tried to acquire planning consent for additional staff accommodation. They are trying to secure neighbouring vacant workshops and land adjacent to their site. In their opinion they have had little support from CNPA. It looks like they are trying to acquire subject to a Section 75 Agreement to retain it for workshop use. In their opinion there is considerable demand for small business sites and every effort should be made to retain and promote these.
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## List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
<p>Neil Prentice Senior Service Manager Angus Council Economic Development County Buildings Market Street Forfar DD8 3RE</p>	01307 473257	<a href="mailto:prenticen@angus.gov.uk">prenticen@angus.gov.uk</a>	<p>Advised that Angus Council have no employment land in the CNPA and they are not looking to change this.</p> <p>Due to the type of land within the Angus section of the park being predominantly glen areas they do not know of any demand for employment land.</p> <p>There may be opportunity for small employment, one off developments associated with dwellings.</p>
<p>Alison Seggie Economic Development Manger Perth &amp; Kinross Council 3-5 High Street Perth PH1 5JS</p>	01738 477953	<a href="mailto:alseggie@pkc.gov.uk">alseggie@pkc.gov.uk</a>	<p>Believes there to be localised demand within the areas.</p> <p>She does not know of any development land/business space that Perth and Kinross have within the CNPA boundary.</p> <p>Aware that Tulliemet (part of Atholl Estates) have recently built a small number of business units which have been occupied and were popular amongst smaller businesses such as joiners. Believes that there could be a demand for this type of small unit on a small scale.</p>
<p>Robert Armstrong Senior Business Development Executive Economic Development Viewmount Arduthie Road Stonhaven AB39 2DQ</p>	01569 768294	<a href="mailto:robert.armstrong@aberdeenshire.gov.uk">robert.armstrong@aberdeenshire.gov.uk</a>	<p>There is not a large supply of business land within the park nor is there a large level of demand. At present supply is low and demand is likewise.</p> <p>Example of Duncans of Deeside bakery based in Finzean (just outside the boundary) who recently relocated to Laurencekirk as there were no sites within the Deeside area which were suitable or economically viable to convert.</p> <p>Supply in this area is based on who you know and being aware of sites becoming available.</p> <p>The amount of enquiries the Council received for Aboyne (not in the CNPA) has dropped. The enquiries for Braemar and Ballater are low. Any enquiries that they do receive tend to be specific on the type of business wanting to locate there. Tends to be focused on tourism rather than other sectors. It is not straight forward and demand tends to be driven by the private rather than the public sector.</p>

## List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
			<p>The Old School in Ballater has been considered for conversion by the Council for office and community use. However nothing has come of this and it remains an aspiration of the Council.</p> <p>In Ballater the Council have lock up garages and small business units which are fully let. The two small sites they had have been disposed off and it is understood they are being considered for conversion for residential/supermarket use.</p> <p>In Braemar the Council own the retail units (in the steading in the centre of the village) and do not own any business space. The community have aspirations for business space in Braemar but there is not enough demand to support this.</p> <p>The Council do not have anything in Dinnet.</p>
<p>Leslie Allan Area Manager – Marr Afford Area Office School Road Afford AB33 8TY</p>	01975 564800	<a href="mailto:leslie.allan@aberdeenshire.gov.uk">leslie.allan@aberdeenshire.gov.uk</a>	<p>Response received to our e-mail confirming Les has been on holiday. He has been trying to get information in order to provide a response. Unfortunately this is not available for the deadline of this report.</p>
<p>William Gilfillan Corporate Manager Inverness, Nairn, Badenoch &amp; Strathspey The Highland Council Town House Inverness IV1 1JJ</p>	01463 724212	<a href="mailto:william.gilfillan@highland.gov.uk">william.gilfillan@highland.gov.uk</a>	No response received.
<p>Sue Palmer Ward Manager - 21 The Highland Council Ruthven Road Kingussie PH21 1EJ</p>	01540 664537	<a href="mailto:sue.palmer@highland.gov.uk">sue.palmer@highland.gov.uk</a>	<p>Sue confirmed that they are not aware of any requirements for commercial or industrial land. They recommended that we liaise with Stuart Black of The Highland Council and also the Estates Team to clarify the current supply of available Council accommodation.</p>

## List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
Pierre Masson Business Projects Officer Moray Council Council Offices High Street Elgin IV30 1BX	01343 563485	<a href="mailto:pierre.masson@moray.gov.uk">pierre.masson@moray.gov.uk</a>	Moray Council formerly covered the areas of Glenlivet and Tomintoul. In the Council's experience there is limited or no demand for business land within these areas. They have no examples of companies wishing to expand or requiring space in these areas.
Matt Johnstone Economic Development The Highland Council – Headquarters Glenurquhart Road Inverness IV3 5NX	01463 702251	<a href="mailto:matthew.johnstone@highland.gov.uk">matthew.johnstone@highland.gov.uk</a>	Matt confirmed that the Council own Newtonmore Industrial Estate and a small industrial estate at Grantown-on-Spey. He confirmed that both estates are fully let with no vacancies. He did not confirm the exact size of the units on each of the estates. As a guide we estimate that Newtonmore Industrial Estate comprises approximately 14 small starter industrial units of 1,000 ft <sup>2</sup> each with 4 larger buildings with yards occupied by the firm of Russwood, Grampian Builders and Meikles of Scotland as well as the fire station. In his experience there is competition from small businesses for units and there is a good level of demand locally. However the lack of supply is constraining this. The Council have had experience of companies relocating out of the area into business parks in Inverness and Moray due to the lack of suitable property but they are unable to provide the names of the companies involved.
Malcolm MacLeod The Highland Council – Headquarters Glenurquhart Road Inverness IV3 5NX	01463 702506	<a href="mailto:malcolm.macleod@highland.gov.uk">malcolm.macleod@highland.gov.uk</a>	Malcolm confirmed that Highland Council have no historic information on the take up of business land within the Strathspey & Badenoch area. He provided a copy of a list of vacant and derelict sites which had been taken from the Scottish Land Vacant and Derelict Land Survey. This list was reviewed and it was concluded that there are a number of sites on the list within the park but these are unlikely to be suitable for commercial development of any scale. There is no

## List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
<p>Debbie MacKay (for the Crown Estate) Associate (Planner) Smiths Gore 12 Bernard Street Edinburgh EH6 6PY</p>	<p>0131 555 1200 M: 07920 810966</p>	<p><a href="mailto:debbie.mackay@smithsgore.co.uk">debbie.mackay@smithsgore.co.uk</a></p>	<p>Advised that Tomintoul is constrained by infrastructure issues including roads and drainage. The Crown Estate did develop business units on a site to the north east of the town square. The original planning consent was for 2 blocks of 3 units in each block. Due to the lack of demand only 1 block of 3 units was constructed. These took over 2 years to let and the rentals had to be significantly reduced. They are now used for storage. One company has recently gone into administration and the unit will be coming to the market. The quoting rents are £1,200 per annum. These units were built with European Grant Assistance. They have no plans to build further units given the lack of demand. The Crown Estate own Glenlivet Estate. They believe that a long term economic master plan is required for Tomintoul. They are happy to work with the park authority to deliver this.</p> <p>They mentioned that the former gift shop/store in the town had closed and was due to be converted back to a house. The former petrol station has closed with an application for a planning consent to convert to flats. They were also marketing the Old Mill of Auchriachan which was previously let to Cairngorm Brewery. They have unsuccessfully tried to attract another micro brewery to take this on. They have now submitted planning to convert this back to a house due to the lack of demand.</p> <p>They believe there may be some demand for B&amp;B accommodation in the town. The former Richmond &amp; Gordon hotel in the town went into administration and has not returned to use. The Crown have plans to open mountain bike trails surrounding Tomintoul and believe this may generate demand for further caravan/camping space. They have plans to open a holiday lodge development next to the existing caravan site.</p>

## List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
Sandra Middleton / Alan Rankin Cairngorms Business Partnership Inverdrue House Inverdrue Aviemore PH22 1QH	01479 810200 01479 780539	<a href="mailto:sandra.j.middleton@gmail.com">sandra.j.middleton@gmail.com</a> <a href="mailto:alan.rankin@visitcairngorms.com">alan.rankin@visitcairngorms.com</a>	Several attempts made but unable to get response from Alan Rankin.
Kevin Bazley Scottish Enterprise Enterprise House 3 Greenmarket Dundee DD1 4QB	01382 305554	<a href="mailto:kevin.bazley@scotent.co.uk">kevin.bazley@scotent.co.uk</a>	He confirmed that Highland Perthshire is part of the wider property market with occupiers being prepared to relocate from Blair Atholl to Pitlochry or Rannoch or vice versa. Scottish Enterprise provided grant assistance a few years ago for the creation of small industrial units on the former sawmill site in Blair Atholl. This is currently fully occupied and there may well be a degree of pent up demand for more space. There are a number of individual businesses particularly in construction or agricultural businesses based in redundant farm buildings across Highland Perthshire. Some of these could potentially relocate and upgrade if more appropriate business space was available. They suspect there are a number of office workers working from home as there is no provision of suitable space. Their experience is very little evidence of documented demand since demand is exclusively local in origin very few people enquire to Scottish Enterprise or the Council as they already know there is nothing available. Generally when property becomes available it is rarely vacant for long and often there is competing interest. They think that ongoing tourist related developments at Taymouth Castle Resort and Kenmore and Pitlochry will only create more demand for contractors and tradesmen to service these projects.
Lorraine Wildblood Scottish Enterprise 27 Albyn Place Aberdeen AB10 1DB	01224 252000	<a href="mailto:Lorraine.Wildblood@scotent.co.uk">Lorraine.Wildblood@scotent.co.uk</a>	Lorraine asked us to speak to Scottish Enterprise Dundee office as well as Leslie Allan for more detailed feedback.



## List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
David Richardson Highlands & Islands Manager SCDI Highlands & Islands Office Ballantyne House 84 Academy Street Inverness IV1 1LU	01463 231878	<a href="mailto:david.richardson@scdi.org.uk">david.richardson@scdi.org.uk</a>	SCDI are not aware of any particular issues having been raised in terms of the lack of supply of business land or any unsatisfied demand. They do not think there are any problems.
Guy Walker Development Manager – International Business HIE Cowan House Beechwood Business Park Inverness IV2 7GF	01463 244208	<a href="mailto:guy.walker@hient.co.uk">guy.walker@hient.co.uk</a>	Guy believes there is a greater trend of people working from home. He provided a DVD showing an overview of this trend across the Highlands. Shop Direct who operate the Littlewoods Catalogue are an example of an employer who take on staff who can work remotely from home. The call centre operator Vertex also recently ran a pilot scheme in Easter Ross taking on 12 staff working from home to service the Westminster Contract. He believes this is a trend that will continue to grow across the Highland area. The key criteria of being able to work from home is good broadband connection.

## List of Public Sector Contacts for Interviews

### Business Gateway - Contacts

Business Gateway Contact	Telephone Number	E-mail Address	Interview Comments
<p>Maria Peter Business Gateway – Contracts Officer Economic Development The Highland Council Glenurquhart Road Inverness IV3 5NX</p>	01463 702289	<a href="mailto:maria.peter@highland.gov.uk">maria.peter@highland.gov.uk</a>	<p>Maria felt she was not in a position to answer questions of land supply/demand. She recommended we spoke to Malcolm MacLeod and Lloyd Cornfield. She did emphasise the affect it has on the expansion of local businesses.</p>
<p>Business Gateway – Moray Craig Robertson – Gateway Manager 17 High Street Elgin Moray IV30 1EQ</p>	01343 563634	<a href="mailto:craig.robertson@highland-opportunity.com">craig.robertson@highland-opportunity.com</a>	<p>Craig felt he did not know much about the CNPA area. His local area is the north coast of Moray. He remarked that the supply for business land in moray is very tight. He stated that much of the land supplied is by Moray Council but the quantity and quality is not sufficient.</p> <p>Craig recommended that the most appropriate person to contact is Lloyd Cornfield.</p>
<p>Business Gateway – Badenoch &amp; Strathspey Lloyd Cornfield – Gateway Manager Town House The Square Grantown-on-Spey PH26 3HF</p>	07787 283215	<a href="mailto:lloyd.cornfield@highland-opportunity.com">lloyd.cornfield@highland-opportunity.com</a>	<p>Telephoned Lloyd Cornfield but he asked for any enquiries to be made by e-mail. We emailed him and his reply stated:-</p> <p>“It is not possible for me to make an informed judgement on this matter. Perhaps Highlands &amp; Islands Enterprise or Highland Council would be better informed re your requirements”</p>
<p>Business Gateway – Deeside (Aberdeen) Andrew Burnett – Gateway Manager Enterprise Business Centre Admiral Court Poynerook Road Aberdeen AB11 5QX</p>	01224 289725	<a href="mailto:andrew.burnett@enetrust.com">andrew.burnett@enetrust.com</a>	<p>Business start-ups are concentrated in the Aberdeen area. Very little knowledge of any issues concerning the supply and demand of business land in the CNPA area.</p>

## List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
Mr Graham MacWilliam General Manager Edrington Group Easter Elchies Craigellachie Speyside AB38 9RX (Tamnavoulin Distillery)	01340 872212 M: 07901511937	<a href="mailto:gmacwilliam@edrington.co.uk">gmacwilliam@edrington.co.uk</a>	CL requested new contact from HIE.

**APPENDIX 3.0**

**AN CAMAS MOR**

**PROPOSED MASTER PLAN**



# AN CAMAS MÒR

## A Proposed New Community in the Highlands of Scotland

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### SUMMARY & EXECUTION

The report presents the objectives and the plan and the 27000000 Masterplan for a new community at An Camas Mòr, a site in the Highlands of Scotland, for the year 2011. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011.

The plan was first proposed by the Highland Council in 1998. The plan was first proposed by the Highland Council in 1998. The plan was first proposed by the Highland Council in 1998.

The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011.

### DESIGN PROCESS

The planning process was led by the Highland Council. The plan was first proposed by the Highland Council in 1998. The plan was first proposed by the Highland Council in 1998. The plan was first proposed by the Highland Council in 1998.

### DESIGN

At this stage the proposals are tentative. The design is a guide and should not be taken as a final design. The design is a guide and should not be taken as a final design. The design is a guide and should not be taken as a final design.

### PLANNING IN GENERAL

An Camas Mòr should be designed with flexibility to meet the needs of the community and the land. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011.

### PERIOD 1

1998 - 2001

### PERIOD A TO 2011

This would be a short plan of 'High Street', with a number of shops and offices. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011.

### PERIOD B TO 2011

This would be a long plan of 'High Street' with a number of shops and offices. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011. The plan is for a new community of 1000 homes for the year 2011.

### PERIOD C TO 2011



This would see a continuation of the High Street, to the 'Open Cross' with further employment space, adding of housing above shops, garages and the cinema area. The Park Road would be appropriate again. As well as the substitutes would be provided to give a complete circle for residential traffic, from the centre. It is provided by this square and the school and a playing field would be required, some space for the open area in the square. Various types would be employed to provide physical space for future housing.

#### PLANNED TO 2027

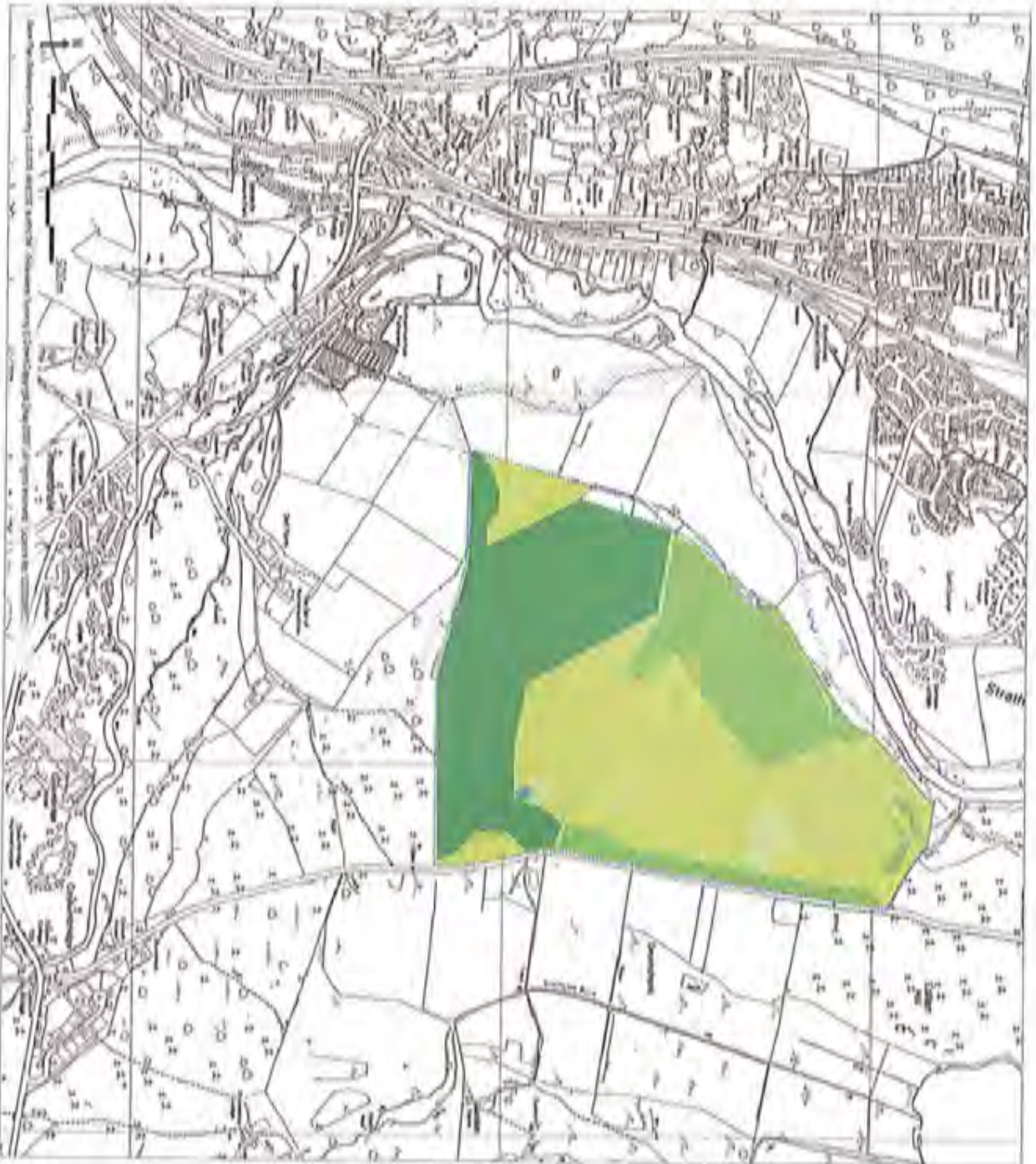
This would complete the High Street, with further employment space, as well as the use of the residential and retail use housing. The bus route would be allowed into a road. The housing would provide a full range of types and features and the parks and play areas completed. This would mean house prices by then and meet an additional playing field. The main facilities would be An Cinnas Mòr would be from the north, along the previous residential area, from the Centre. After 2027 some house have built, any further expansion would need to be informed, by additional needs consultation.

Plans of shows the infrastructure and the plan for shops (shops) housing (houses) being opened.

#### PLANNED TO 2027 WOODS AND THE P & COTTAGE ROAD

This shows the expansion of shops of residential and open area and a full range of shops the shopping and playing areas are provided with the proposed commercial use which would be additional green space.

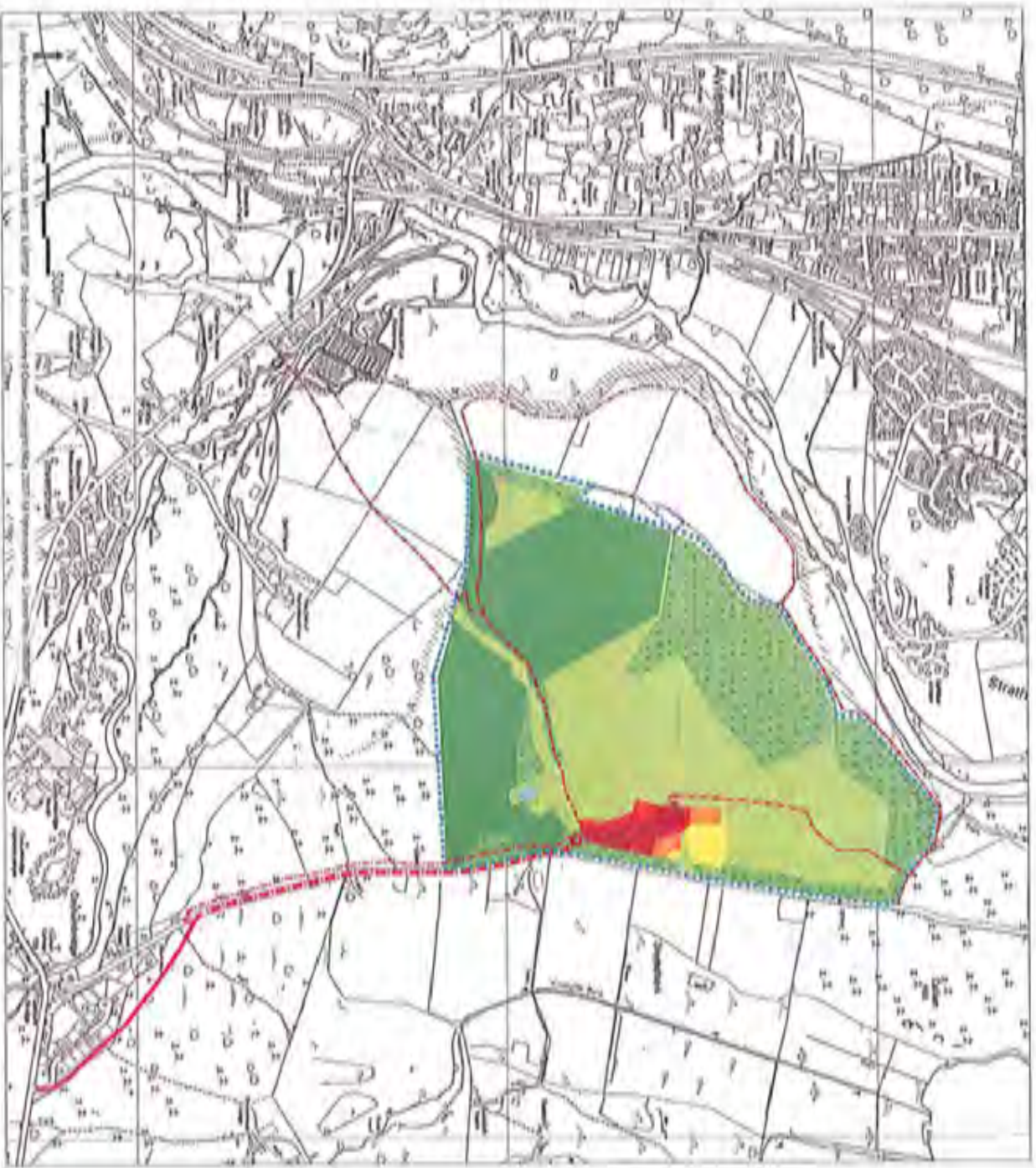
PERIOD ZERO 1ST JULY 2008



# PERIOD A 2011

## KEY TO PROPOSALS

- New Ancient Residual boundary
  - Large Residential development
  - Major areas of retained & new woodland including Ancient Woodland Sites
  - Major areas of open ground/uses areas including Open Access Sites
  - Lower density zone: Detached houses 1:2000; Semi High buildings other open space and woodland uses
  - Medium density zone: Detached & Semi High 1:1200; Semi High buildings other open space and woodland uses
  - Higher density zone: Semi High and High 1:800; High buildings other open space and woodland uses
  - Special circumstances
  - Property Value sensitivities
  - High boundaries or higher density zone with Apartment, Townhouse, Private and/or ground floor retail, W.I., Cafe, Community Building
  - Development
  - New rural outbuilding
  - Existing stable
  - Existing & proposed water access
  - A boundary
  - Air Quality Action boundary identified in the Local Plan
  - 2000m<sup>2</sup> or greater
  - 500m<sup>2</sup> or greater
  - 100m<sup>2</sup> or greater
- Number of submissions per period
- | Period    | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|-----------|---|---|---|---|---|---|---|---|---|----|
| 2008-2011 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2011-2014 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2014-2017 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2017-2020 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2020-2023 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2023-2027 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |







# PERIOD C 2018

## KEY TO MICROZONES

- SH1 Acute standard priority: improvement of passenger only
- High use of existing bus routes including passenger standard priority, including high priority bus
- Low use of existing bus routes including high priority bus
- Lower density zone: Standard bus routes 15-20 stops per km high including minor stop sites and standard bus
- Medium density zone: Standard bus routes 15-20 stops per km high including minor stop sites and standard bus
- Higher density zone: Standard bus routes 15-20 stops per km high including minor stop sites and high priority bus
- Very high density zone: Standard bus routes 15-20 stops per km high including minor stop sites and high priority bus
- Airport/air terminal
- Major rail corridor
- High density, or higher density zone with apartment / mixed use, multiple use or ground floor, retail, F&E, Call Centres/retail
- Development
- New rail corridor
- Existing roads
- No route if ground levels exist
- New RTD route for passenger only: public transport
- Air Corridor for the boundary as defined in the Land Use Plan
- RTD route
- Overlap/overlap standard

Microzone	Area	2018-2021	2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	2051-2056
SH1 Acute standard priority	Area	4	6	3	0	0	0	0	0
High use of existing bus routes	Area	2	6	6	6	6	6	6	6
Low use of existing bus routes	Area	2	6	6	6	6	6	6	6
Lower density zone	Area	4	6	6	6	6	6	6	6
Medium density zone	Area	4	6	6	6	6	6	6	6
Higher density zone	Area	4	6	6	6	6	6	6	6
Very high density zone	Area	4	6	6	6	6	6	6	6
Airport/air terminal	Area	4	6	6	6	6	6	6	6
Major rail corridor	Area	4	6	6	6	6	6	6	6
High density, or higher density zone with apartment / mixed use, multiple use or ground floor, retail, F&E, Call Centres/retail	Area	4	6	6	6	6	6	6	6
Development	Area	4	6	6	6	6	6	6	6
New rail corridor	Area	4	6	6	6	6	6	6	6
Existing roads	Area	4	6	6	6	6	6	6	6
No route if ground levels exist	Area	4	6	6	6	6	6	6	6
New RTD route for passenger only: public transport	Area	4	6	6	6	6	6	6	6
Air Corridor for the boundary as defined in the Land Use Plan	Area	4	6	6	6	6	6	6	6
RTD route	Area	4	6	6	6	6	6	6	6
Overlap/overlap standard	Area	4	6	6	6	6	6	6	6

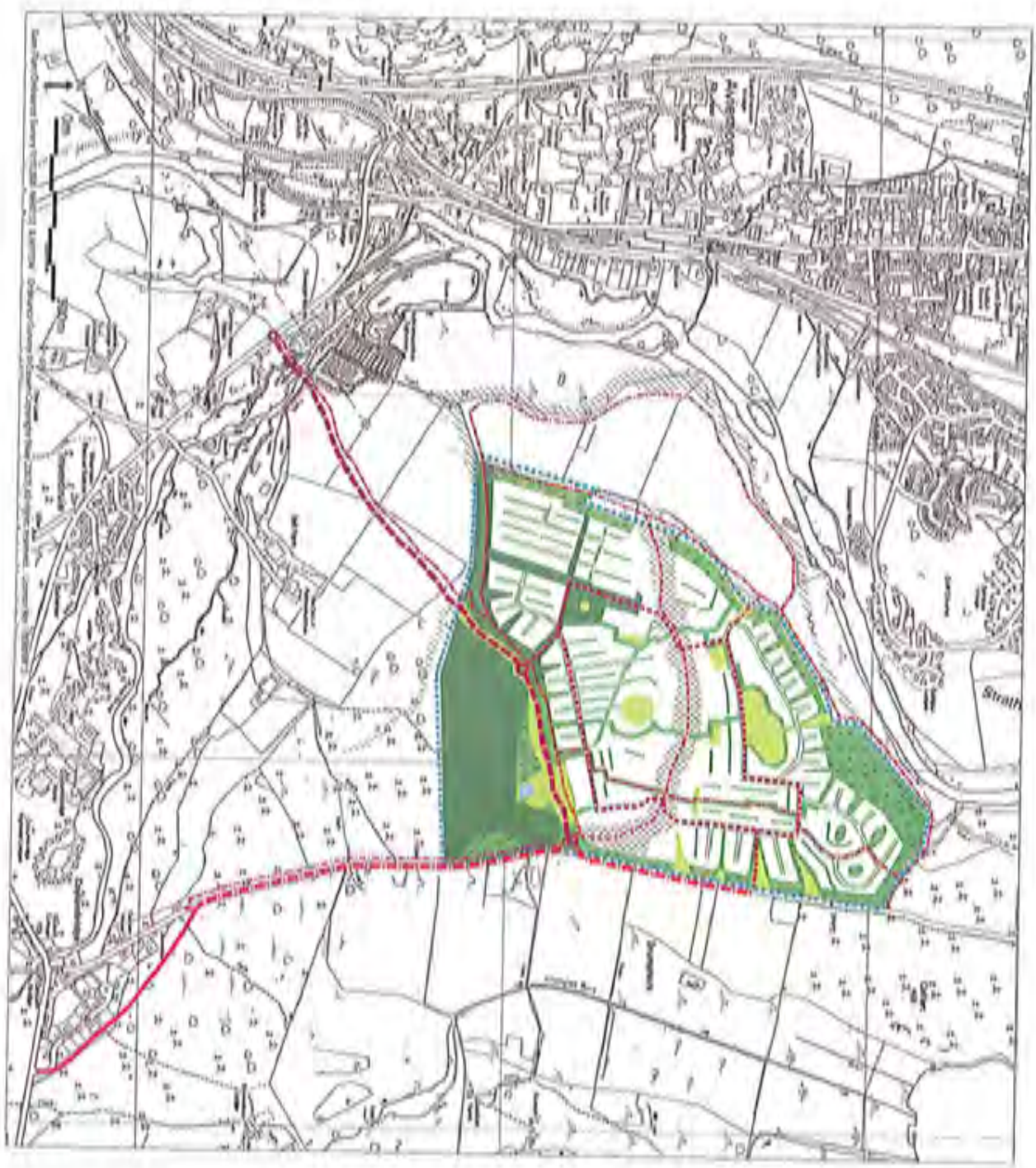




# PERIOD D 2027 WOODLAND, TREES & OPEN SPACE

## KEY TO PROPOSALS

- Open woodland/woodland inventory  
Complete/total of plantation/wood
- Areas of woodland & new woodland  
including open woodland/woodland
- Higher areas of open ground with trees  
including open woodland/woodland
- Green space
- Existing woodland planting strip
- New tree
- Open woodland
- Woodland
- New area woodland/  
Woodland/wood
- New tree
- All ground within access
- New 2027 and subsequent years
- All Green space boundaries  
as defined by the landform
- Woodland/  
Woodland/wood
- Woodland/wood



## **APPENDIX 4.0**

### **Review of Existing Allocations of Commercial and Industrial Land as well as notes of Available Commercial Property**

## AVIEMORE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>AV/ED1</b></p> <p>The existing Dalfaber Industrial Estate and Cairngorm Technology Park provide opportunities for economic development proposals. An area of 0.5 hectares to the north of the existing estate is included to allow for future expansion. This area is currently used for informal recreation with pedestrian links through the site that should be protected.</p>	12.87	1.02	<p>The bulk of this site comprises a development site owned by Spey Valley Hire Centre. They have planning consent to develop 4 industrial units ranging from 2,000 ft<sup>2</sup> to 3,000 ft<sup>2</sup>. They have no intentions of building these speculatively at the current time.</p>
<p><b>AV/ED2</b></p> <p>There is a 2.3 hectare site south of Dalfaber Industrial Estate and Cairngorm Technology Park. Most of this allows for future expansion when the current site reaches capacity.</p>	4.64	3.11	<p>The existing TSC call centre is located at the entrance to this site. The remainder is available for development. The topography is varied with the site being long and narrow spanning between two railway lines.</p>
<p><b>AV/ED3</b></p> <p>Aviemore Highland Resort will continue to develop and enhance its facilities. Closer links with the village centre should be developed and will be highlighted by the revised Aviemore framework. Part of the site lies within SEPA's indicative 1 in 200 year Flood Risk Assessment. Details of flood risk assessment will be required to accompany and development proposals. In developing any further proposals for the site access arrangements should not affect the A9 as a trunk road and should use the local road network.</p>	54.79	4.11	<p>The previous Master Plan for this site comprised mainly residential development with an expansion to the hotel, some retail development and some business development with provision for office buildings extending to 3,660 m<sup>2</sup> or thereby.</p>
<p><b>AV/ED4</b></p> <p>There are opportunities for small economic growth to complement the existing Myrtlefield Industrial Estate. Any new developments should seek to enhance the area and its surroundings.</p>	2.46	0	<p>We are not aware of any opportunities to develop land or property within this estate. It would appear to be fully utilised.</p>

**AVIEMORE – FURTHER COMMERCIAL PROPERTY AVAILABLE**

Property	Estimated Size	Comments
<b>Former Petrol Filling Station Southern End of Aviemore</b>	0.2 acres	Has been acquired by Inverburn Homes. This would appear to be capable of commercial development.
<b>Aviemore Shopping Centre</b>	From 269 ft²	There are office suites currently available from 269 ft².
<b>Aviemore Village Hall Grampian Road, Aviemore</b>	0.6 acres	The existing hall is available for sale. This would appear suited to retail development given its prominence to Grampian Road or alternatively to housing.
<b>Development Site Dalfaber Industrial Estate Aviemore</b>	0.75 acres approx.	There is an existing development site extending to approximately ¾ acre owned by Spey Valley Hire Centre. They have planning consent to develop four industrial units from 2,000 ft² to 3,600 ft². In addition they currently have a single workshop of approximately 2,000 ft² available.
<b>Speyside Business Centre Dalfaber Industrial Estate Aviemore</b>	Office Suite	There is an office suite available to lease within this small business centre.
<b>Former Clockwork Removals Storage Warehouse Dalfaber Industrial Estate Aviemore</b>	657.9m² (7,081 ft²) 0.6 acre site	This property has recently come up for sale or lease due to relocation. Quoting price in excess of: £400,000.

## BALLATER

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<b>BL/ED1</b> The existing business units owned by Aberdeenshire Council remain with vacant space reserved for business uses. Part of this site lies within SEPA's indicative 1 in 200 year Flood Risk Assessment. A detail for risk assessment may be required to accompany any further development proposals for the site.	1.54	0	These existing business units appear to be fully occupied with no space for further development.
<b>BL/ED2</b> Bus station between Golf Road and Viewfield Road will remain as a site for business use or another use appropriate to the town centre should it be vacated by its current occupiers.	0.23	0	This is the existing Bluebird Buses Depot. It is currently operational.
<b>BL/ED3</b> The existing caravan and camping site will be protected from adverse development.	7.76	0	This is the existing Ballater Caravan Park. This is currently operational and would appear to trade well. Ballater Fire Station is directly opposite.

## BALLATER - FURTHER COMMERCIAL PROPERTY AVAILABLE

Property	Estimated Total Site Size	Comments
The Old School Ballater	To be confirmed	Aberdeenshire Council have considered converting The Old School for office or community use. Given funding constraints this remains an aspiration of the Council.



BLAIR ATHOLL

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
Site 06 - this is the former rail goods yard.	0.5	0	New houses have been built at the entrance to this site. It would appear to be capable of being developed for business use although substantial commercial traffic may be unsuitable passing the new houses.
Site 07 - this is the former sawmill yard.	8.87	1.67	Part of this has been successfully developed by Tullimet Limited for Atholl Estates. They have developed 8 x 500 ft <sup>2</sup> units and 6 x 1,500 ft <sup>2</sup> units. They are fully let at rents ranging from £4.20 to £4.75 per ft <sup>2</sup> . There would appear to be further capacity within this site for the development of more industrial units.

There is no further commercial property noted to be available.

**BOAT OF GARTEN**

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>BG/ED1</b> Land at the station will provide opportunity for future economic development in support of the village and should incorporate enhance this important tourism facility where appropriate.</p>	7.55	0	This is the existing Strathspey Railway. The site is currently utilised as a popular tourist attraction. It lies immediately next to Boat of Garten Golf and Tennis Club. It would seem to be unsuitable for commercial development as it is fully utilised at this time.
<p><b>BG/ED2</b> The existing caravan and camping site is protected from adverse development.</p>	5.8	0	This site is the existing Boat of Garten Caravan Park. It appears to be busy and well run. It would be suitable for commercial development.

**BOAT OF GARTEN – FURTHER COMMERCIAL PROPERTY AVAILABLE**

Property	Estimated Total Site Size	Comments
The Old Boat of Garten Village Hall	Unknown	We understand this may be available for sale.

## BRAEMAR

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>BM/ED1</b></p> <p>The site of the ambulance station may provide opportunity for small scale economic development particularly where this supports the economic growth of the community.</p>	0.15	0.725	<p>We note that the former Bluebird Bus Depot has been purchased and may be redeveloped. There has been housing constructed on the street leading up to this. There is a former Council Depot. This would appear to be derelict and capable of commercial use. Immediately behind this is a wooden building that would appear to be suitable for commercial use.</p>
<p><b>BM/ED2</b></p> <p>The new square is a key facility within the centre of the village and has capacity to support additional retail and business units.</p>	0.25	0	<p>This site has been developed as a village centre mews incorporating retail uses. It would not be suitable for commercial or industrial use although any vacant space could potentially be converted to office accommodation.</p>
<p><b>BM/ED3</b></p> <p>This is the existing Caravan Park.</p>	11.55	0	<p>This site is fully utilised.</p>

There would appear to be no further available commercial property in Braemar.

## CARRBRIDGE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>C/ED1</b></p> <p>The existing vacant business and industrial sites south west of the A9 are identified for business uses.</p>	18.11	0	A number of businesses are located in this site including Landmark Press. All of these businesses seem to be involved in the forestry or timber industry. The majority of land appears to be in use. There would seem to be scope for the development of new buildings. The site is adjacent to the A9 although the access to get back onto the A9 is rather convoluted.
<p><b>C/ED2</b></p> <p>This site provides an important contribution to the local economic position and should be retained. Part of the site lies within SEPA's indicative 1 in 200 year Flood Risk Area. A detailed Flood Risk Assessment may be required to accompany further development.</p>	0.68	0	This is the existing Old Bridge Garage operated by Scottish Fuels. It comprises a petrol station and shop with garage space to the rear. The site is currently in operation.

## CARRBRIDGE – FURTHER COMMERCIAL PROPERTY AVAILABLE

Property	Estimated Site Size	Comments
The Former Struan Hotel Carrbridge	8,000 ft <sup>2</sup>	Currently available for sale. The owners have secured planning consent for conversion to residential use and are trying to sell this former hotel at a price of £330,000. It remains available.

**CROMDALE**

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>CD/ED1</b>                      A small site at the smokehouse has some potential to provide for economic development in the village. Any proposal must ensure that issues regarding contamination and access are adequately addressed. Part of the site lies within SEPA's 1 in 2000 year Flood Risk Area. A detailed Flood Risk Assessment will be required to accompany any development proposals.</p>	<p>0.65</p>	<p>0</p>	<p>This site is being used by Simpson Safety Fencing and is already in business use. There is no opportunity for further development.</p>

**DALWHINNE**

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>DW/ED1</b>                      The site provides an important contribution to the local economic position and should be retained.</p>	<p>0.78</p>	<p>0</p>	<p>This is the existing Petrol Filling Station which has been refurbished in recent years. There is ample land around this for further commercial development.</p>
<p><b>DW/ED2</b>                      The Lochailort Hotel provides an important tourist and community opportunity and appropriate proposals to enhance this will be supported.</p>	<p>1.7</p>	<p>0.39</p>	<p>There may be scope for limited commercial development on land surrounding the existing hotel. In addition to the north of the hotel there is ample land which is used as a truck stop and used to have a café. It could accommodate commercial development.</p>

## GRANTOWN-ON-SPEY

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<b>GS/ED1</b> The existing caravan and camping site will be protected from adverse development.	21.12	0	This is the existing Grantown-on-Spey Caravan Park. This appears to be well run. This site would be ideal for commercial development but it is assumed the existing business is profitable and will continue.
<b>GS/ED2</b> Opportunities for economic growth to compliment the existing Woodlands Industrial Estate exist. Any new developments should seek to enhance the area and its surroundings. There are options to develop a terminus within this area to support the growth of the Strathspey Railway.	19.37	0	This appears to be a healthy functioning industrial estate. There is a site owned by Wilburn Homes as you enter the estate which is being marketed for the development of eco office pods ranging from 1,000 ft <sup>2</sup> to 2,000 ft <sup>2</sup> . 4 office pods are proposed on the site. The site is now being marketed for sale. There appears to be limited land and existing buildings available within this estate to accommodate any demand.

## GRANTWON-ON-SPEY – FURTHER COMMERCIAL PROPERTY AVAILABLE

Property	Estimated Size	Comments
Achnagonalin Industrial Estate	5,800 ft <sup>2</sup>	We understand this estate is owned by Highlands & Islands Enterprise. There would appear to be land available for development but we have been advised that all of the available plots are under offer for sale. A private developer has built a terrace of 5 industrial units that do not appear to have been let. Quoting rental of £7,200 per annum based on 1,162 ft <sup>2</sup> units.
5 The Square, Grantown-on-Spey	1,173 ft <sup>2</sup>	This former public bar is being marketed for lease or sale. It is suitable for a wide range of commercial uses including retail. The quoting price is £165,000 or the rental is £13,000 per annum.

There would appear to be other retail units available for lease on the High Street.

## KINCRAIG

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>KC/ED1</b></p> <p>The site of the Baldow Smiddy and land to the rear provide some opportunity for growth and economic development in the settlement.</p>	1.46	1.46	This is understood to be the former Smiddy. The existing warehouse is currently available for lease. The site is available for commercial use and/or development. The warehouse is estimated to be 4,000 ft <sup>2</sup> - 5,000 ft <sup>2</sup> and is available at a quoting rent of £15,000 per annum.

## KINGUSSIE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>KG/ED1</b></p> <p>Land to the east of the settlement provides opportunity for economic development in support of the settlement. A prominent site, the design of any development will be to the highest standards. Both the siting and design should integrate with the landscape.</p>	5.32	5.32	This site slopes from South East up to North West. It is currently covered in trees and may not be suitable for development as the costs of levelling plots may make this an expensive site to build on.
<p><b>KG/ED2</b></p> <p>A small area of land to the west of Spey Street adjacent to the railway line could also provide some opportunity to support the economic development of the settlement. Part of this site lies within SEPA's indicative 1 in 200 year Flood Risk Assessment. A detailed Flood Risk Assessment will be required to accompany any development proposals.</p>	3.88	2.23	This site is an existing small car park. There is also an existing building on the edge of the site that may have potential to be used as a business centre. The site has excellent links to the town centre and the station and would be suitable for business development. Part of the site is located underneath the railway line and access to this is limited. The site is generally flat but there are mature trees in the middle of it which may be protected.

## NETHYBRIDGE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>NB/ED1</b></p> <p>This 0.76 hectares site adjacent to a housing site is identified for business use. Any development of the site will need to take into account its site within woodland and at an entry point to the village.</p>	2.41	2.41	This site may be difficult to develop for commercial use given the woodland nature and the requirement to retain the trees.

## NEWTONMORE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<p><b>NM/ED1</b></p> <p>Land to the rear of the existing transport café may provide some opportunity for low impact economic development. A prominent site, any development would be to the highest standard.</p>	3.4	1.7	The site would be ideal for business development being close to the main road as you enter the town. It is relatively flat.
<p><b>NM/ED2</b></p> <p>The existing industrial estate will be protected and developments which consolidate the economic provision of this site will be supported.</p>	7.36	0	We estimate this estate provides 14 x 1,000 ft <sup>2</sup> industrial units. There are four larger occupiers who have sites between 1 – 2 acres each. We understand from The Highland Council that this estate is full with no available space. It may be possible to relocate the fire station from the estate freeing up a further building. It may also be possible to zone additional business land close to allow expansion of the industrial estate. One of the constraints facing the estate is the single track road leading into it.
<p><b>NM/ED3</b></p> <p>The role of the Highland Folk Museum is important to the economic success of the area as a whole and proposals to expand and enhance the facility will be supported. Part of the site lies within SEPA's indicative 1 in 200 year Flood Risk therefore a detailed Flood Risk Assessment will be required to accompany any development proposals.</p>	79.64	0	The site is fairly undulating with a challenging topography. It is currently used as the Highland Folk Museum site. It is unlikely to be suitable for any commercial development as it may be expensive to develop.



**TOMINTOUL**

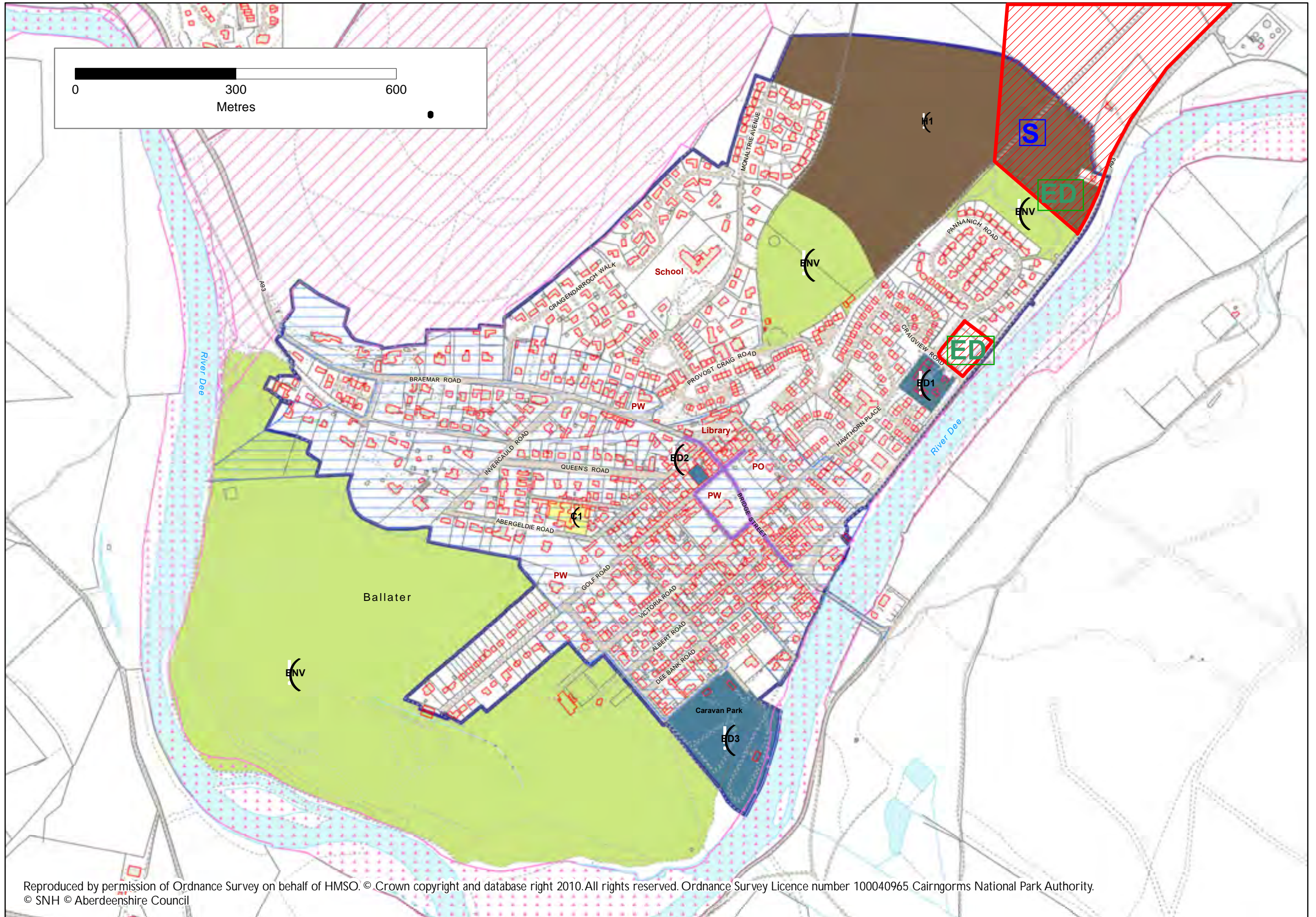
Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
<b>ED/1</b>	2.69	0	This site has potential to be developed as a camping site or tourist facility with the existing tree planting retained to ensure adequate screening.
<p><b>ED2 &amp; ED3</b></p> <p>This land is partially developed for economic development purposes and provides a certain amount of space for expansion and growth during the Local Plan period. Commercial development would be appropriate on ED2 and tourist development appropriate on ED3. Both sites will require the inclusion of landscaping to minimise the visual impact of any development.</p>	6.13	3.08	The site is occupied by a Roads Depot as well as a terrace of modern industrial units developed by the Crown Estate. These are currently fully let. There is further land behind these for the development of more units.
<p><b>ED4</b></p> <p>This site is in economic use.</p>	1.51	1.51	This site is in use.

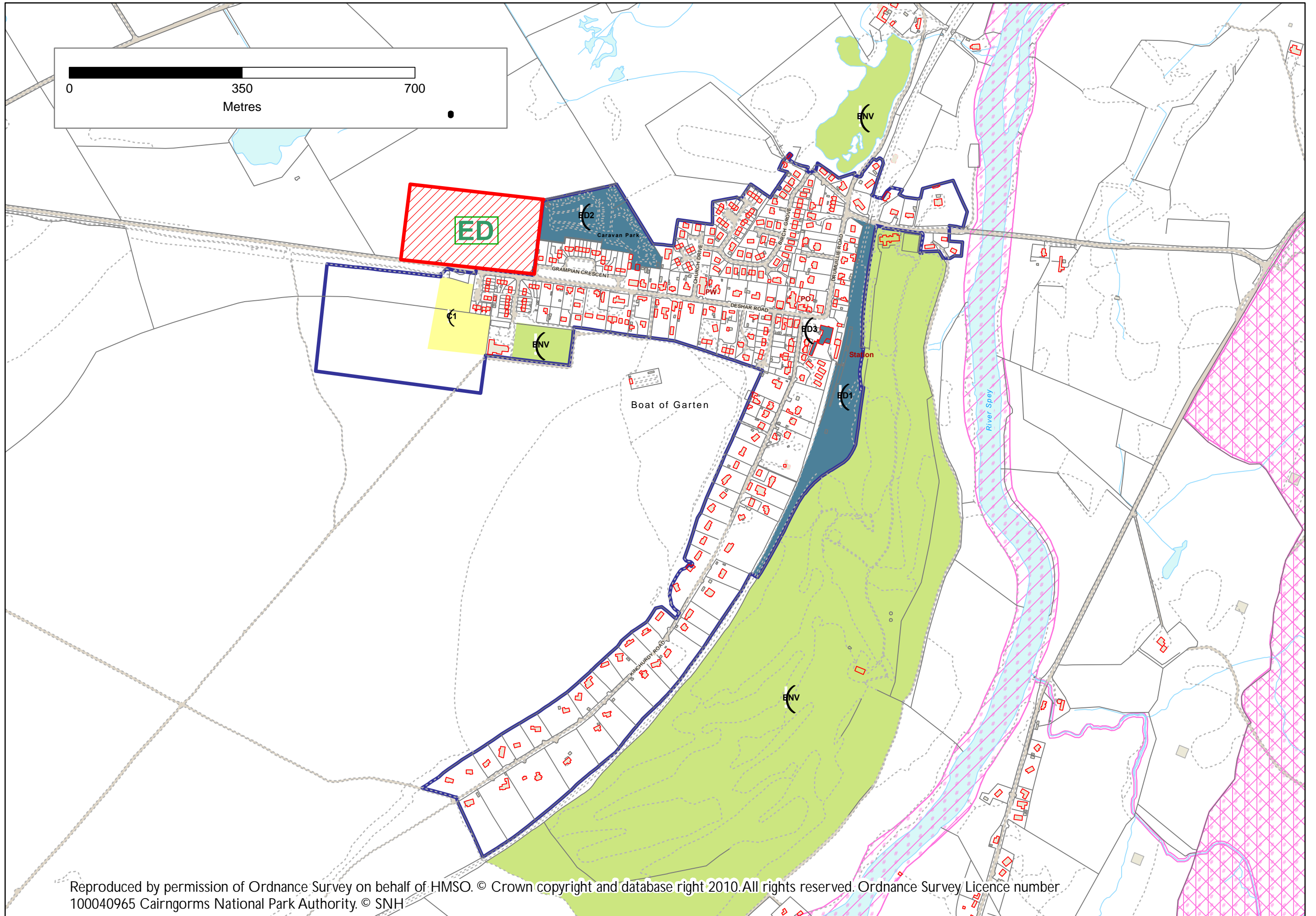
**TOMINTOUL – FURTHER COMMERCIAL PROPERTY AVAILABLE**

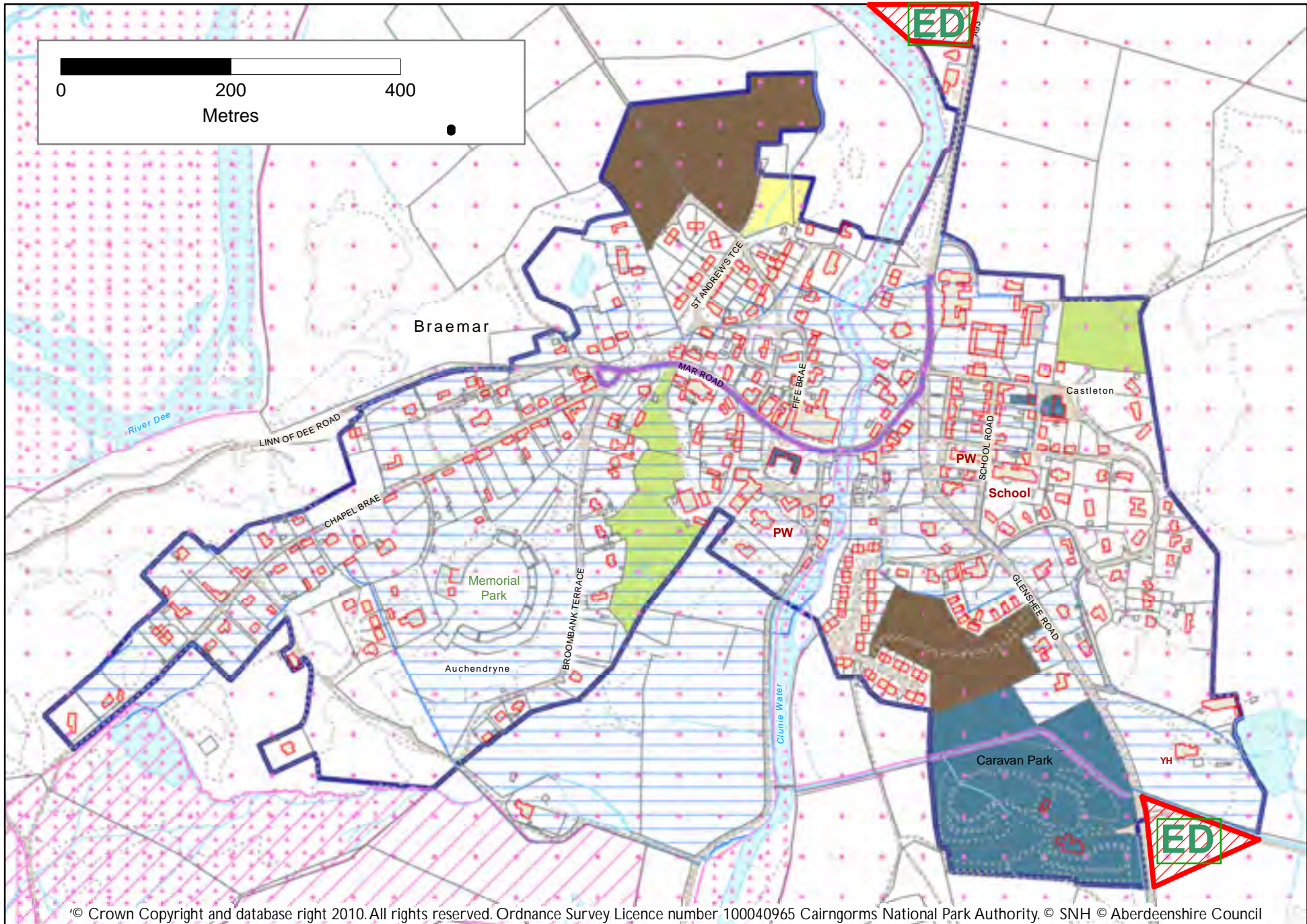
Property	Estimated Total Site Size	Estimated Undeveloped Land (Acres)	Comments
Former Gordon & Richmond Hotel The Square, Tomintoul	5,000 ft <sup>2</sup>	0	Currently vacant. This could potentially be converted back into commercial use.

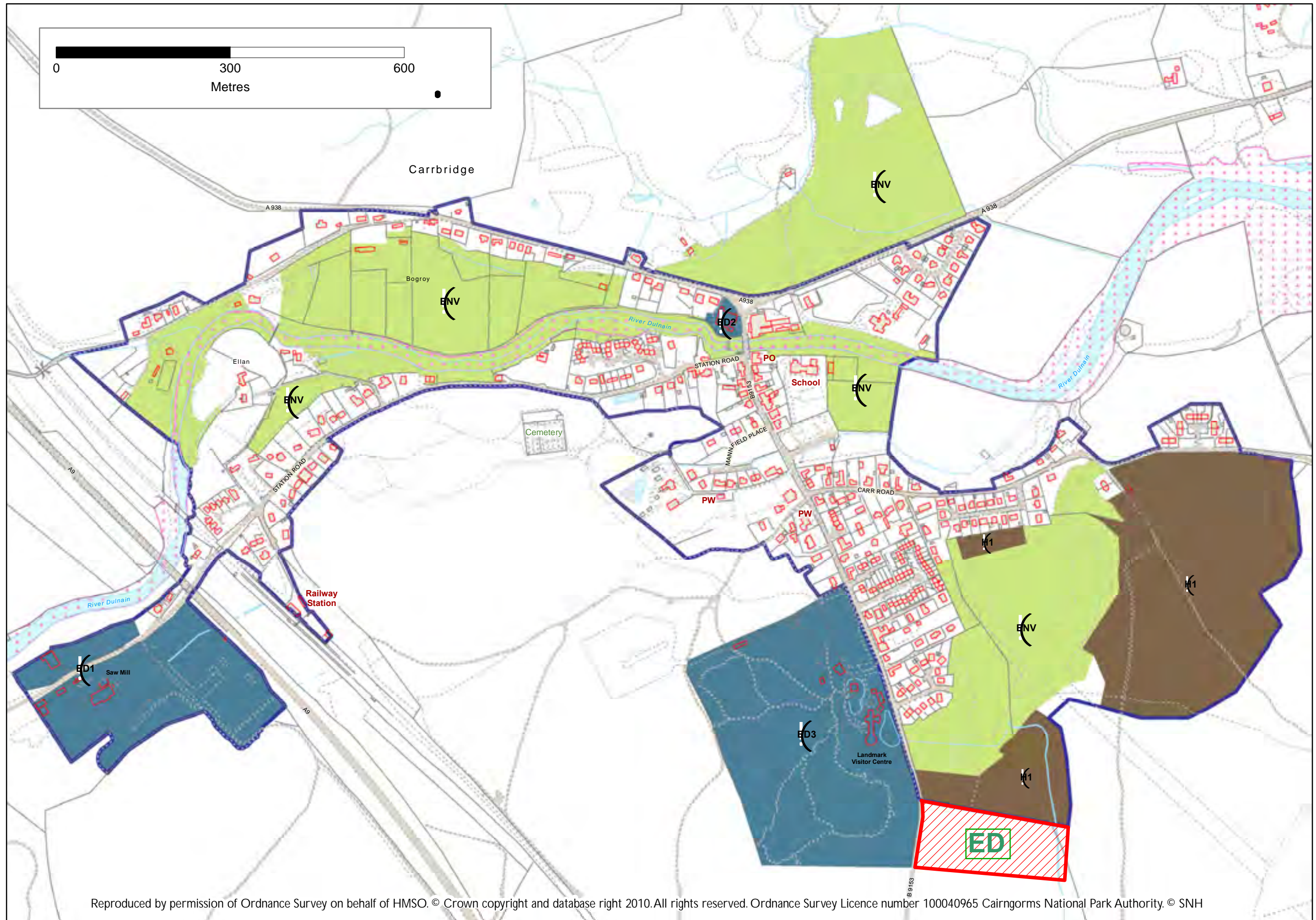
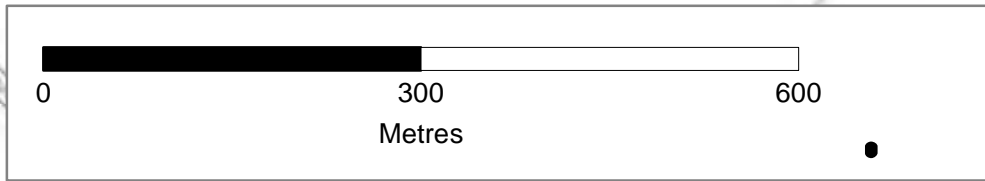
## **APPENDIX 5.0**

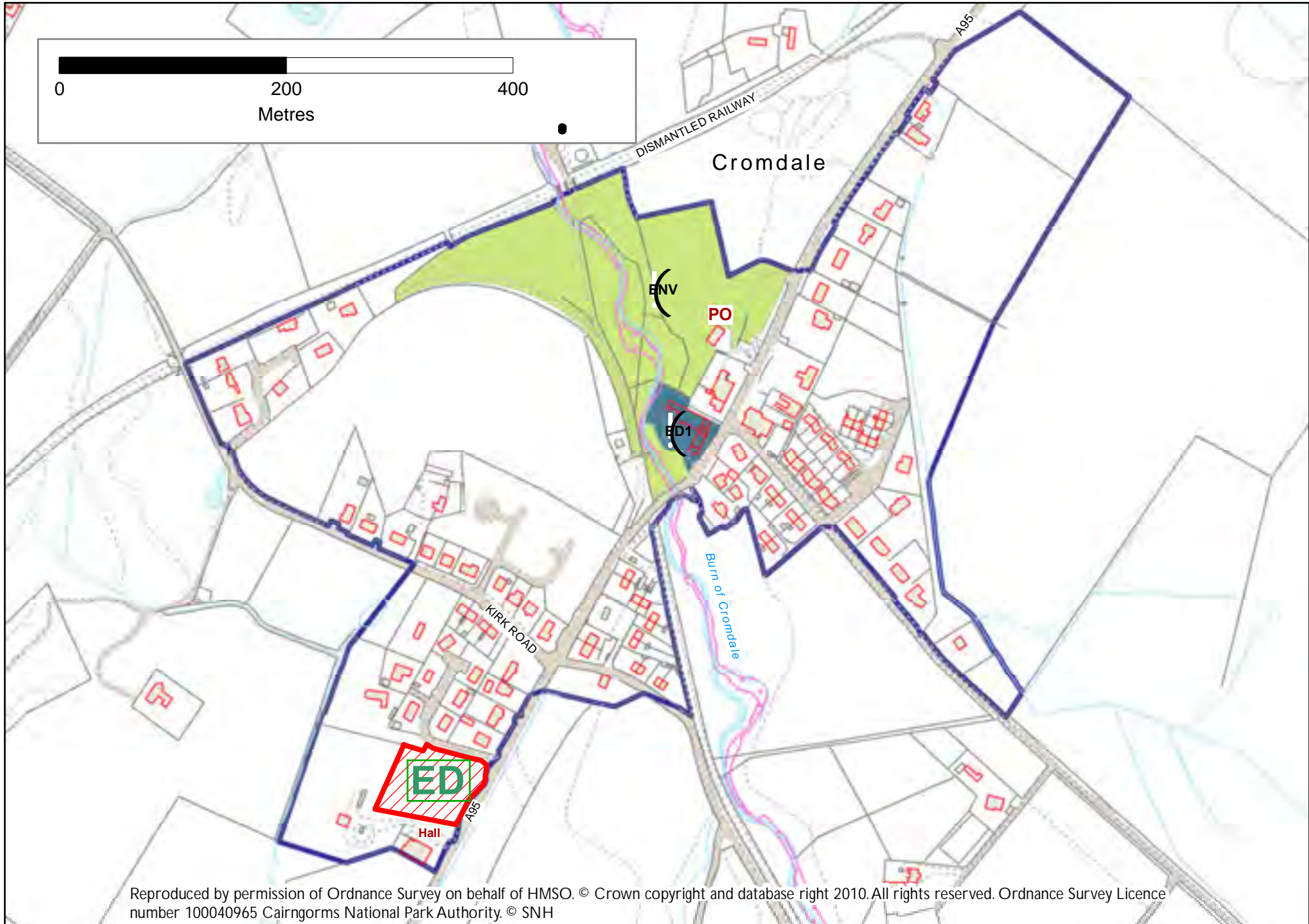
### **Plans Showing Potential Sites that could be Zoned**



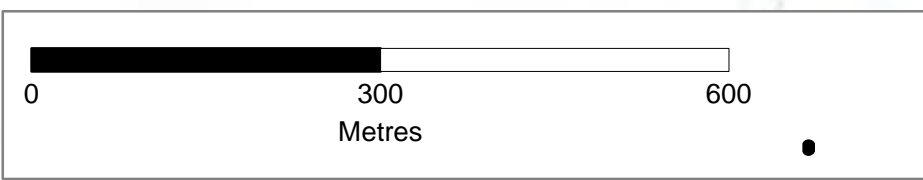




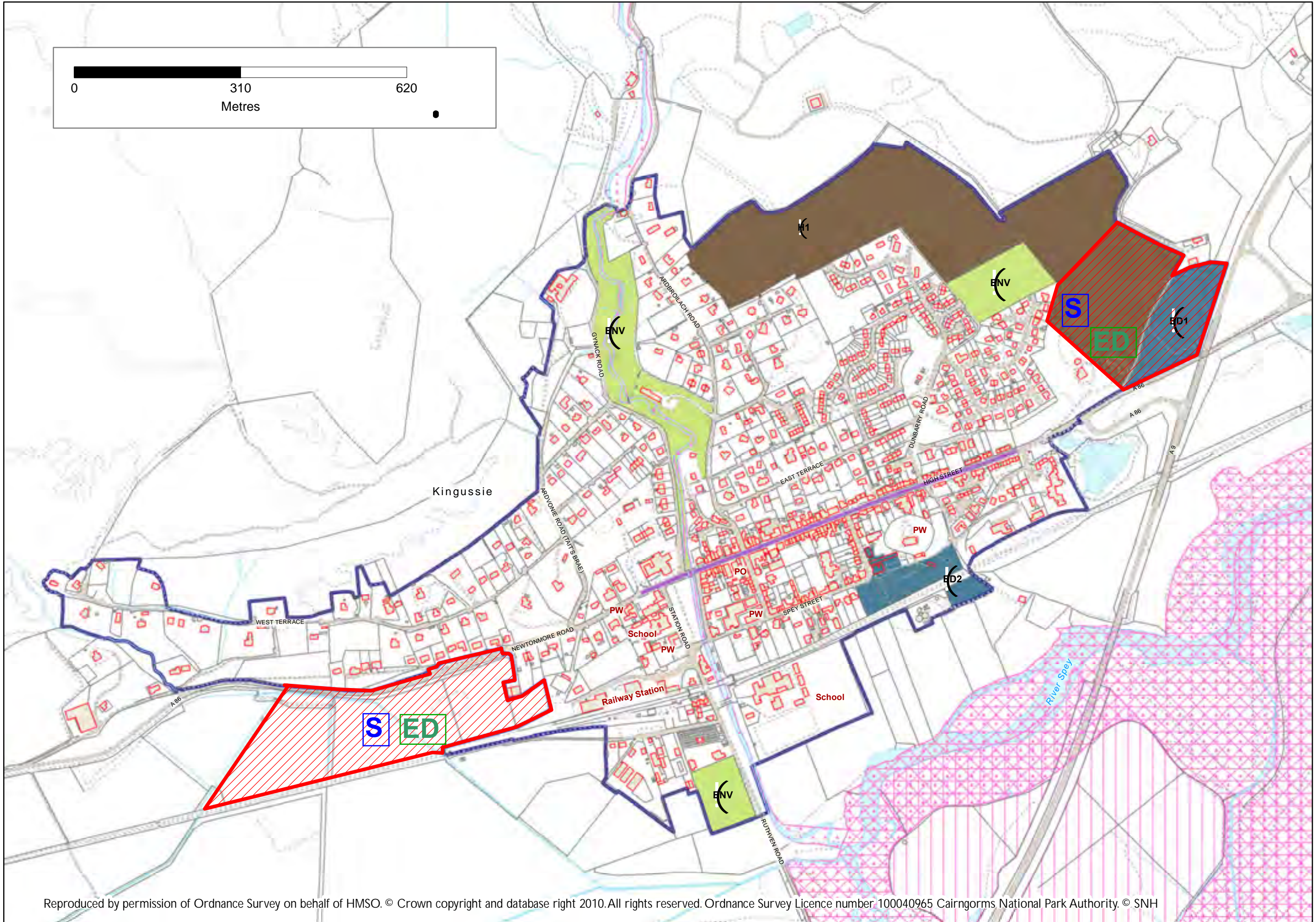
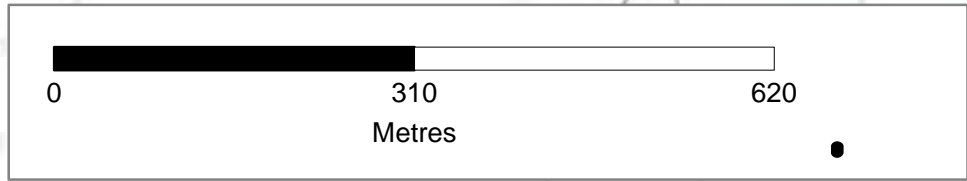


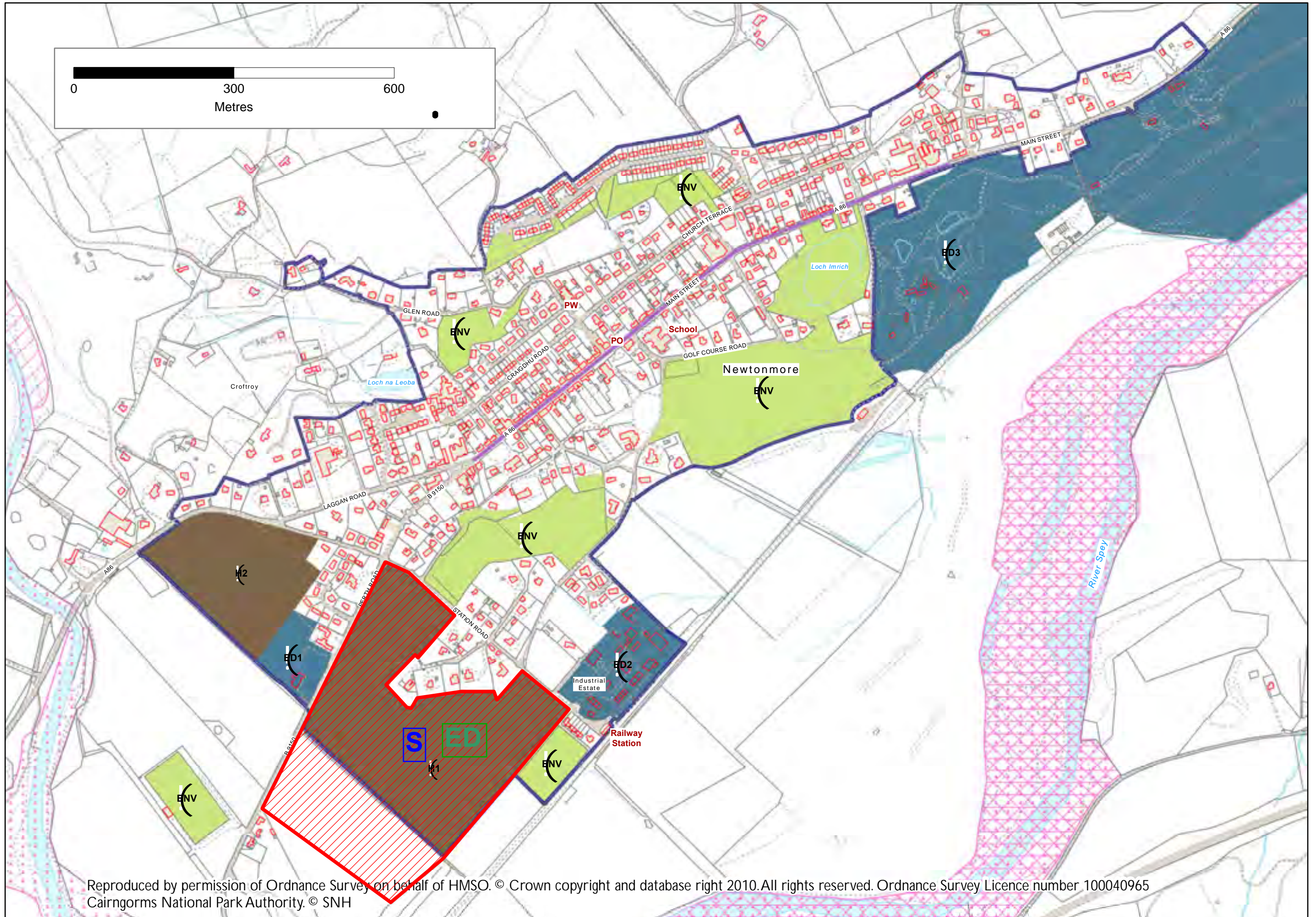


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