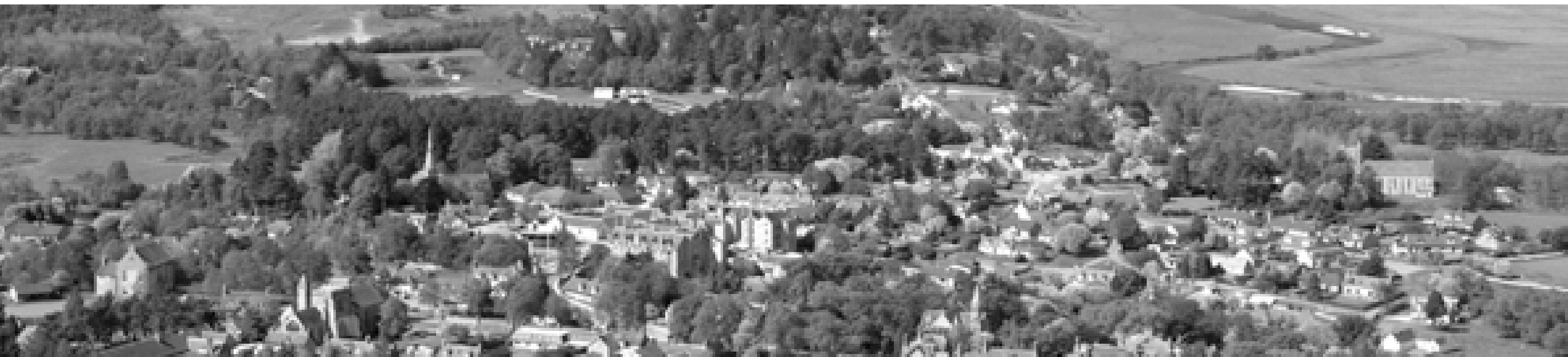
Cairngorms National Park

Cairngorms National Park Local Development Plan

Main Issues Report - Background Evidence

2. Economy



Main Issues Report - Background Evidence
2. Economy

This is one of five Background Evidence Reports that have informed the Cairngorms National Park Main Issues Report. These reports look at:

1 Housing and population – sets out the rationale for the new housing requirements identified in the Main Issues Report. It looks at how the population of the Park is expected to change and considers the impact this may have on the future number and types of households in the Park. It also summarises the Housing Need Demand Assessments produced by the Local Housing Authorities and identifies the housing land supply.

2 The economy – sets out the rationale for the new employment land identified in the LDP. It looks at the evidence which exists, the demand information gathered as part of a study commissioned to support the LDP and any available information published by the Local Authorities.

3 Monitoring report – an assessment of progress on the implementation of the adopted Local Plan (October 2010).

4 Other information – summary of other information which has informed the development of the Main Issues Report.

5 Site analysis – an assessment of potential development sites submitted by landowners, developers and agents as part of the CNPA 'Call for Sites' process.

These reports set out the rationale for the approach taken in the Main Issues Report on the various topics. They provide detail not contained within the Main Issues Report, and should be read together with the Main Issues Report to get a full picture.

MIR/11/02

Cairngorms National Park
Main Issues Report Consultation
Monday 19 September – Friday 9 December 2011

Any comments or responses to the content of these reports should be included within your consultation response on that part of the Main Issues Report and should not form a separate comment or response. Comment forms, and copies of all the Main Issues Report documents, are available from the CNPA offices or online at **www.cairngorms.co.uk**

Responses should be sent to:
Cairngorms National Park Authority
FREEPOST NAT 21454
GRANTOWN-ON-SPEY
PH26 3BR
Email: localplan@cairngorms.co.uk

Further information
If you have any queries regarding the consultation, please contact:
Cairngorms National Park Authority
Albert Memorial Hall
Station Square
Ballater
Aberdeenshire AB35 5QB

Tel: 013397 53601
Fax: 013397 55334
Email: localplan@cairngorms.co.uk

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1. Introduction

1.1 The Local Development Plan (LDP) must identify sufficient land to meet the needs for employment land for its area. It must focus on the main proposals for development for the plan period although it is helpful to give clarity on options for development beyond that time.

1.2 This report sets out the rationale for the new employment land identified in the LDP. It looks at the evidence which exists, the demand information gathered as part of a study commissioned to support the LDP and any available information published by the local authorities.

2. Policy Framework

The Cairngorms National Park Plan 2007-2012

2.1 The LDP is a key tool in the delivery of the vision and outcomes of the National Park Plan (NPP)[1]. The NPP provides an overarching context for development planning and development management within the Cairngorms National Park. The long-term vision for the National Park needs communities that are sustainable in social, economic and environmental terms. To achieve this it sets a number of strategic objectives which are aimed at achieving sustainable growth of the economy which it recognises as being key to supporting sustainable communities, and creating a strong and vibrant National Park which also stimulates and supports the wider regional economy.

- Create conditions conducive to business growth and investment that are consistent with the special qualities of the Park and its strategic location.
- Encourage entrepreneurship, especially in young people and in sectors which complement the special qualities of the Park.
- Promote 'green business' opportunities.
- Promote opportunities for economic diversification across all areas of the Park.
- Address barriers to employment uptake.
- Raise the profile and excellence of local produce and services.
- Promote access to education and vocational training in all levels across the Park.
- Ensure a match between training provision and current/future skills needed.

2.2 In its aspirations relating to the economy and employment, the NPP also sets a series of strategic objectives for land management which are also relevant.

[1] Cairngorms National Park Plan 2007-2012

2.3 Whilst it is important to remember that the NPP is currently being reviewed, it is still the key document which guides the overarching context for development planning and development management until it is formally replaced. The LDP will however take cognizance of the ongoing work to revise the NPP to ensure the two documents will be in accord on completion.

Scottish Planning Policy (SPP)

2.4 SPP[2] is clear that the planning system should proactively support development that will contribute to sustainable economic growth and to high quality sustainable places. It should enable the development of growth- enhancing activities across Scotland while protecting and enhancing the quality of the natural and built environment which are assets for that growth. We should recognise and respond to economic and financial conditions in considering proposals that could contribute to economic growth.

2.5 Planning authorities are directed to ensure there is a range and choice of marketable sites and locations for businesses allocated in development plans. This should include sites which provide a variety of sizes and opportunities for a variety of uses, including mixed use developments. The supply of suitable sites should be reviewed regularly and new sites brought forward where existing allocations do not meet current and anticipated market expectations. The specific needs of different businesses should be taken into account in development plans, including the importance of access to the transport network.

2.6 Development plans should also support small business development and growth, and promote opportunities for low-impact industrial, business and service uses which can co-exist with housing and other sensitive uses without eroding amenity. We should adopt a flexible approach to working from home where the amenity of surrounding properties will not be significantly affected.

2.7 New development should safeguard the area's environmental quality and promote opportunities for enhancement and regeneration where appropriate.

Economic Strategies

Government Economic Strategy

2.8 The Government Economic Strategy sets out how sustainable economic growth will be achieved.[3] It identifies five strategic priorities that are critical to economic growth:

- learning skills and wellbeing;
- supportive business environment;
- infrastructure development and place;
- effective government;
- equity.

Aberdeenshire Council

2.9 Although much of the economic strategic guidance and direction provided by Aberdeen City and Shire focuses on the city and its immediate hinterland, it is still important that we, in the National Park take proper account of the growth aspirations, and play what part we can in realising them in that part of Aberdeenshire that falls within the National Park Boundary. The Economic Manifesto's vision[4] is to achieve an economy which is one of the most robust and resilient in Europe, with a reputation for opportunity, enterprise and inventiveness. This will be done in the context of high-quality options for growth in an environment that is interesting and enjoyable.

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2 Scottish Planning Policy 2010 para 33

3 The Government Economic Strategy 2007

4 Building on Energy – The Economic Manifesto for Aberdeen City and Shire 2007

2.10 Eight strategic priorities to achieve this vision have been identified. Among those most relevant to our part of Aberdeenshire are:

- Deliver a fully integrated transport network.
- Maximise our intellectual capital – people and expertise.
- Attract and develop skilled people.
- Improve the efficiency of planning decision making.

To achieve these, availability and access to land for expansion is critical.

The Highland Council

2.11 Highland Council is committed to a number of areas of work to support economic development across the Highlands[5]. Of particular relevance to the Local Development Plan are:

- Recognise and support the importance of the Cairngorms National Park to the Highland economy.
- Work with Highlands and Islands Enterprise (HIE), Scottish Development International and statutory infrastructure providers to make the Highlands one of the most attractive places to do business in Scotland.
- Work with the Scottish and UK Governments and partners to prevent and reduce poverty by supporting more people into sustained employment.
- Continue to decentralise Council jobs throughout the Highlands and work with partners to identify opportunities for further dispersal of public sector jobs.

2.12 To achieve these commitments, we must ensure a suitably supportive development plan allows for appropriate development which supports the economic, and is suitably flexible to react to the dynamic economic situation found in this part of Scotland.

[5] Highland Council Corporate Plan and Council Programme 2009-2011

Moray Council

2.13 A major new economic strategy is being developed by Moray Council. It will supersede the existing Moray 2020 document and will set the long-term economic diversification strategy for the area.

2.14 A small part of Moray Council falls within the National Park and the economic strategy will apply to that area around Tomintoul and Glen Livet. This is an area which has suffered as a result of the current economic climate. Business closures have had a detrimental impact on the community as a whole.

2.15 Whilst undoubtedly the Council strategy will deal with the impact of RAF Kinloss and continued uncertainty over RAF Lossiemouth, it is will also give direction to the whole of the Council area.

Perth & Kinross Council

2.16 Perth & Kinross Council have a vision for their communities: ‘we will create and sustain vibrant, safe, healthy and inclusive communities in which people are respected, nurtured and supported and where learning and enterprise are promoted’[6]. To achieve this, they have recently reviewed their Economic Strategy to take account of recent changes in the national and local economy. As part of this strategy, there are a number of priorities, some of which are relevant for that part of Perth & Kinross which falls within the National Park boundary:

- Provide focused, joined-up and appropriate business advice and support.
- Focus on growth opportunities (including tourism, renewable energy and the general insurance sector).

2.17 The provision of appropriate amounts of land to meet the needs of the business sector in that part of the Park is important if these priorities are to be achieved.

[6] Perth & Kinross Community Plan 2006-2020

3. Employment Land Audits

3.1 SPP directs local authorities to carry out a regular review of the available land for economic growth to ensure it is appropriate and effective. Within the National Park, Aberdeenshire Council prepare an annual review.[7] Only one site falls within the National Park boundary. The site at Tullich Road provides 0.4ha of effective land to meet the local demand. The other Local Authorities Do not have no current audits to help inform the Main Issues Report.

[7] Aberdeen City and Shire Employment Land Audit 2010 – see Appendix 1

4. Development Land for Commercial and Industrial Use – Study

4.1 The CNPA, together with Highlands and Islands Enterprise, commissioned a review of the supply of and demand for development land for commercial and industrial use within the National Park.[8] Specifically this study looked at land suitable for development falling within Use Classes 4, 5 and 6 of the Town and Country Planning Use Classes Order (Scotland) 1997.

4.2 Historically, the CNPA has had difficulty gauging need and demand for commercial land. This study targeted key businesses and organisations to assess their future requirements, and provide robust evidence of demand. The study also assessed existing supply both allocated in the adopted Local Plan and in established commercial sites.

4.3 The research found limited demand, with five companies with active requirements for land totalling 12 to 12.5 acres. However, the study does conclude that with the unique economy in the Park and its increasing population there is undoubtedly a need to have cost-effective, viable development land, certainly in the larger settlements.

4.4 The Local Development Plan must plan ahead and provide sufficient flexibility to react to unknown demand in support of a sustainable and thriving economy. The study suggests two options to achieve this, and we agree that focusing on a number of strategic sites across the Park, which conform to the settlement strategy is the most appropriate way forward. Other land should, however also be included where it supports the local community.

[8] Development Plan for Commercial and Industrial Use 2011

5. The Economic and Social Health of the Cairngorms National Park, 2010

5.1 In 2010, the CNPA commissioned a study[9] to establish the economic and social baseline of the communities in and around the National Park. This report is useful to the Local Development Plan as it highlights particular parts of the economy of which we must be aware. An appropriate policy framework must be put in place to support these in the future.

5.2 This report concludes that the structure of the Cairngorms National Park's economy is highly unusual, with a distinctive mix of industries contributing to the area's creation of wealth. Whisky production and forest products are particularly distinctive. The Park also includes the most tourism-focused parts of Scotland. Recent growth in the importance of the public sector, land based industries and the food and agriculture sectors all add to the dynamics of the economy.

5.3 The Cairngorms National Park is also home to a small number of significant manufacturing operations. Their main trade links are usually with organisations outwith the Park and they tend to either be long established organisations which have diversified into new fields or they have located in the area thanks to the high quality natural environment. There is evidence that the region is becoming an attractive base for other innovative industries. In the study, a cluster of creative, media and knowledge based businesses is identified. This contributes an estimated £4 million of value added to the Park's economy each year.

5.4 The Local Development Plan must make appropriate provision for all these sectors, and anticipate the likely demands, principally on the need for land specifically allocated for that use, and on the need for a flexible but supportive policy framework to facilitate appropriate growth and investment.

[9] The Economic and Social Health of the Cairngorms National Park, 2010

6. Monitoring the Health of Our Town Centres

6.1 The Local Development Plan must take into account the current position within the key areas of economic activity in the Park. As a result the town centres of the main settlements have been surveyed.

6.2 'Town Centres are a key element of the economic and social fabric of Scotland, acting as centres of employment and services for local communities and a focus for civic activity.' [10] The Local Development Plan should enable gaps and deficiencies in town centres to be remedied by identifying appropriate locations for new development and regeneration. Scottish Planning Policy goes on to clarify that: 'to be identified as a town centre a diverse mix of uses and attributes, including a high level of accessibility, must be provided'. Successful town centres provide a diverse range of community and commercial activities, including places of employment, open spaces and meeting places. They are a mix of interdependent land uses which, when taken together with their physical structure, should create a unique sense of place, character and identity. Retail and leisure provision are fundamental to the concentration of other activities located in town centres.

6.3 To inform the approach taken in the LDP, an assessment of all the town centres in the Cairngorms National Park has been undertaken. This has taken the form of a health check. Planning Advice Note 59 gives us direction on how to conduct a health check, and this approach is the one used across the National Park. The information gathered through the health checks can then be applied to town centre strategies and for subsequent positive action to improve quality and competitiveness.

6.4 A health check is the appropriate monitoring tool to measure the strengths and weaknesses of a town centre and to analyse the factors which contribute to its vitality and viability ('V&V indicators'):

- **Vitality** is a measure of how lively and busy a town centre is.
- **Viability** is a measure of its capacity to attract ongoing investment, for maintenance, improvement and adaptation to changing needs.

6.5 Together these measures give an indication of the health of a town centre and, when used consistently over a period of time, can demonstrate changes in performance that can inform future decision making. A range of key performance indicators can be used to provide an effective insight into the performance of a centre and so offer a framework for assessing vitality and viability. For example:

- **Pedestrian flow** (footfall) measures the numbers and movement of people on the streets. Counts should be collected on a consistent basis over a period of time, at different locations and times.
- **Prime rental values** provide a measure of the relative position of locations or streets within a centre and give an indication of retailer desire to locate within an area.
- **Space** in use for different town centre functions and how it has changed.
- **Retailer representation and intentions**: national multiples and independents.
- **Commercial yield**. Although a valuable indicator of retail viability, it needs to be used with care as, in part, it reflects a developer's rather than a retailer's interest in locating in an area.

[10] Scottish Planning Policy 2010

- **Vacancy rates**, particularly street-level vacancy in prime retail areas.
- **Physical structure** of the centre, including opportunities and constraints, and its accessibility.
- **Periodic surveys** of consumers.
- **Crime** – co-operation with the local police Architectural Liaison Service can assist in identifying persistent or potential problems in an area.

6.6 A number of other indicators are also recognised, including: environmental quality, turnover, available expenditure and competing investment and tourism.

6.7 The main purposes of collecting V&V data generally relate to the following key functions:

- To support the preparation and implementation of development plan policies and proposals for town centres.
- To inform proactive planning and investment for town centres strategies acting as a baseline for investment decisions and priorities over time.
- For development management purposes for the assessment of retail proposals.

Cairngorms National Park Town Centre Health Checks

6.8 Health checks have been undertaken in each of the Cairngorms National Park's strategic settlements as identified in the Cairngorms National Park Local Plan – Aviemore, Ballater, Grantown-on-Spey, Kingussie and Newtonmore. These 'checks' use surveys and assessments of the provisions and perceptions of the centres, and are a good way of gauging the vitality and viability of town/village centres. Overall judgements are made on site inspections only. The checks have been applied to two distinct areas:

- Within identified town/village centres (typically the traditional high street and other areas identified as containing the commercial/social and core functions of a town).
- Within edge of town/village centres which are peripheral areas but with some of the main functions or facilities.

The 2010 health check provides a baseline for future monitoring, allowing for ongoing and comparative review of the performance of the centres.

Summary of Indicators – Retailer Representation

6.9 Successful centres should have a good range of shops including specialist independents, for example deli's, and national multiple retailers, for example Co-operative food stores.

6.10 In all of the strategic settlement centres with the exception of Aviemore, specialist independent stores are dominant. The Co-operative food store does however occur in almost every community (again, with the exception of Aviemore). Small, independents, ranging from deli's to gunsmiths and galleries, make up the majority of stock.

	Specialist independents	National multiple retailers	Charity shops	Vacancies
Aviemore	10	16	2	1
Ballater	21	2	1	4
Grantown-on-Spey	23	4	1	6
Kingussie	15	2	0	4
Newtonmore	4	1	1	3

Summary of Indicators – Diversity of Uses

6.12 Successful centres should be diverse and perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day; the importance of diversity to the success of a centre ensures it should be more than just retail – various uses and a broad range of facilities are to be assessed.

6.13 The number of office premises is limited mainly to estate agents, solicitors, the CNPA and the various councils. A prominent feature of all the strategic settlement centres is the number of cafés, takeaways and restaurants. Aviemore has the highest number of these. Many places offer a variety of functions such as cafés, bistros and bars, often within hotels. This emphasises the role of the centres as tourist hubs for the Park and beyond.

	Offices	Cafés and Tearooms	Restaurants	Bars
Aviemore	2	4	9	5
Ballater	6	4	3	2
Grantown-on-Spey	8	2	2	2
Kingussie	5	5	2	4
Newtonmore	0	4	4	4

Summary of Indicators – Environmental Quality

6.14 This is measured using an appraisal of the centre considering the appearance of the environment, the quality of its buildings, the public spaces, its sense of place, cleanliness, signs of decay and neglect and visitor infrastructure.

6.15 Many of the centres benefit from a distinct sense of place, and high quality environment with good green spaces. Ballater and Grantown-on-Spey are particularly noteworthy. All were clean, without any tangible signs of neglect or decline. Limited signs of investment were also present in Aviemore, Ballater and Grantown-on-Spey.

Summary of Indicators – Accessibility

6.16 Access is measured using a number of factors including the quality and frequency of public transport, adequacy of car parking, ease of pedestrian movement, traffic impact – whether the centre is located on a busy main road, is it traffic calmed or does it suffer from chaotic car parking.

6.17 Many of the centres were to some degree blighted by high volumes of through traffic and high levels of car parking principally on the main streets. This is to be expected during the high points of the tourist season. Aviemore in particular suffers badly. Some chaotic car parking seemed to disrupt traffic flows especially in Kingussie. Public transport provision appears to be good in the majority of centres.

Summary of Indicators – Tourism

6.18 Visitor facilities are recorded, including the range and quality of visitor attractions, information and signage.

6.19 Given the predominance of the tourist industry in many of the centres, tourist attractions are generally lacking as are information points and signage. All had Tourist Information Centres (TIC). Newtonmore, in particular, provided good levels of tourist facilities.

Conclusions from Town Centre Health Check

6.20 The surveys have showed our town centres to be above average. Every effort should be made to ensure this position continues and improves where possible. The Local Development Plan should therefore make appropriate provision for positive support for the town centres found in the Park.

7. Key Issues for the Local Development Plan to Address

7.1 Based on the information available, the Local Development Plan will have to identify land to support the economy of the Park. In light of the lack of empirical information on land requirements a supportive policy framework will also be required. This dual approach will help direct any identified need to appropriate sites, but also allow for appropriate ad hoc development which supports economic growth.

8. Assumptions and Flexibility

8.1 The CNPA must be satisfied that it has made every effort to identify need and demand for economic and industrial land it its preparation of the Local Development Plan.

8.2 We must consider the level of available information and provide support through the planning system for appropriate development.

8.3 A degree of flexibility must also be included to ensure that the whole of the Park has sufficient provision to meet need and demand. The geography of the Park creates a number of market areas. Provision in one will not necessarily meet the needs of another.

9. The Employment Land Requirement and the Current Local Plan

9.1 The current adopted Local Plan provides for some economic opportunity, and supports existing businesses. It did not however identify many opportunities for new investment. This stemmed from a lack of empirical evidence to support the identification of sites to meet both need and demand. The Plan did however recognise that there is undoubtedly an unidentified need and demand for investment opportunity. To deal with this a suite of supportive policies were included.

10. The Employment Land Requirement and the Local Development Plan (LDP)

10.1 In developing the LDP, the CNPA identified a lack of available information to guide development planning for this sector. The various studies referred to above were therefore commissioned to assess both need and demand. It is interesting that the study on Development Land for Commercial and Industrial Use found little empirical need or demand for the identification of new land for investment. Anecdotal information does however point to demand particularly for small start-up business units to house office and light industrial accommodation.

10.2 Focusing investment on strategic settlements which are able to cope with new development is therefore seen as the best approach to guide investment.

11. Conclusions

11.1 The economy of the Park and the way it supports our communities is a key focus for the Local Development Plan. Sustainable economic growth remains a key objective of the Scottish Government and the LDP must facilitate this in a way best fitting to the special qualities of the Park.

11.2 The CNPA has made every effort to assess both the need and demand for additional land to support this sector. It has also completed further baseline assessments to inform the approach to take in planning for the future.

11.3 There is little empirical evidence of need for additional land for investment. However there is clearly a need for the LDP to provide appropriate support to the right form of development which supports both the economy of the Park and its communities.

11.4 The LDP must therefore direct new development to the most appropriate location. The strategic settlements are the most sustainable location for this growth, and building on existing industrial and commercial sections within these settlements focuses businesses together. To ensure appropriate support is given to other ad hoc development which supports both the economy and the aims of the Park, the LDP must include a framework of policies to guide investment.

12. Appendices

Appendix 1	Detailed Town Centre Health Survey Results
Appendix 2	Aberdeen City and Shire Employment Land Audit 2010 (extract)
Appendix 3	Development Land for Commercial and Industrial Use Report

Appendix 1 – Detailed Town Centre Health Survey Results

Ranking used

The Town Centre Health Survey used a number of indicators:

- Retail representation
- Diversity of uses
- Environmental quality
- Accessibility
- Tourism

Each indicator is scored on a scale of 1 – 5.

Score	Rating
1	Very Poor
2	Poor
3	Average
4	Good
5	Very Good

Aviemore

Survey date: 20 July 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	16 *no*
	Independent specialist Shops	10 *no*
	Charity/discount shops	2 *no*
	Range of food Shopping (convenience or supermarket)	2 *no* Score: 4
	Range of shops overall	Score: 3
	Vacant premises rate (occupancy levels)	1 *no*
	Investment by retailers (evidence of improvements etc)	Score: 4 – new builds
Space in use for different functions (diversity of uses)	Offices (financial and professional services)	2 *no*
	Cafes, tea rooms, pubs, restaurants	17 *no*
	Community/other facilities (specify)	Library, community hall
	Essential rural services – post office, banks etc (specify)	Post Office, banks
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 4
	Investment by users (evidence of improvements etc)	Score: 4
Environmental quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	Score: 3
	Signs of recent investment/improvements	Retail unit construction
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 3
	Traffic impact	Score: 2
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score: 2
	Visitor information, signage	Score: 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
• Very high levels of through traffic, some buildings of character and note. • Aviemore Highland Resort (AHR) gap site – improvement works needed.

SWOT Analysis

Strengths	Opportunities
• Large visitor numbers • Number of independent specialist shops • Tourist Resort focus,	• Public realm improvements
Weaknesses	**Threats**
• Lack of alternative tourist attractions – retail only, TIC • No real built heritage, landmarks • Lack of choice – accommodation, visitor amenities etc • Lack of attractive green spaces	• Lack of tourist info and facilities • Increased car parking pressures, traffic volume • Large numbers of cafes, restaurants, sports shops – over dominant • High retail/sportswear dependency • Seasonal visitor pull

Inventory

Grampian Road	Name	Use Class
1.	Mackenzie's Highland Inn	LS9
2.	A.Munro & Co/Remax/A Stewart Financial Advisor	OFF1
3.	Winking Owl, 2 Hoots	LS10
4.	VACANT (former Haddows)	
5.	Walkers Shortbread	CNV1
6.	Snippitz Hair/Aviemore Beauty	RS4/RS5
7.	Panchos Takeaway/Restaurant	LS10
8.	La Boheme Restaurant	LS10
9.	The Village Centre Shops	COM 15
10.	Spey Valley Hardware & Household Stores	COM 18
11.	Aviemore News/Post Office/Opticians	Various
12.	Snow Mountain Takeaway	LS8
13.	Scotbet.com	LS4
14.	Ryder Foundation Charity Store	COM 5
15.	Boots the Chemist	COM 6
16.	Skiing Do Restaurant	LS10
17.	Thain Electrical	Com 12
18.	2 retail units under construction	
19.	RBS	FBS10
20.	Police Station	
21.	Papa Rock Pub	LS1
22.	Cairngorm Mountain Sports/Blue Mountain Cafe	COM 30/LS3
23.	Public Toilets	
24.	Subway Takeaway	LS8
25.	Fat Face	COM 20
26.	Julian Graves (Health Foods)	CNV 6
27.	HBOS	FBS10
28.	Tesco Supermarket	CNV 10
29.	Country Crafts	COM 8
30.	Frasers Butchers and Deli	CNV 2

31.	Blacks	COM 30
32.	Bridgemill Direct	COM 20
33.	Smiffy's Fish and Chips	LS8
34.	Ashers Bakery	CNV 1
35.	Semi-Chem	COM 6
36.	Café Bleu Coffee Shop	LS3
37.	TIC	TOU2
38.	The North Face Shop	COM 20
39.	Ellis Brigham Mountain Sports	COM 30
40.	Café Mambo	LS3
41.	Speyside Countrywear	COM 20
42.	Nevisport	COM 30
43.	Waterstones	COM 3
44.	The Coffee Corner	LS3
45.	Cairngorm Hotel	LS9
46.	Roo's Leap Restaurant	LS10
47.	Railway Station	
48.	Highland Property Services	FBS 9
49.	WH Smith	COM 25
50.	Spice of India	LS10
51.	Highland Hospice Charity Shop	COM 5
52.	Esso Garage	COM34
53.	Mountain Sports	COM 30
54.	AHR (food court and retail)	LS9/COM 8
55.	The Apartment (self-catering)	LS9
56.	Royal Tandoori	LS10
57.	Happy Haggis Fish Bar	LS8
58.	Active Aviemore	COM 30

Ballater

Survey date: 16 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	2 *no*
	Independent specialist shops	21 *no*
	Charity/discount shops	1 *no*
	Range of food shopping (convenience or supermarket)	6 *no* Score: 3
	Range of shops overall	Score: 3 – lack of choice of foodstores
	Vacant premises rate (occupancy levels)	4 *no*
	Investment by retailers (evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	Offices (financial and professional services)	6 *no*
	Cafés, tea rooms, pubs, restaurants	9 *no*
	Community/other facilities (specify)	Score: 3 (town hall, toilets, TIC)
	Essential rural services – post office, banks etc (specify)	Score: 2 (bank, post office)
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Score: 3
Environmental quality	Appearance of the environment generally	Score: 4
	Sense of place (distinctiveness and local identity)	Score: 4
	Signs of decay, decline and neglect	None
	Signs of recent investment/improvements	None
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 3
	Car parking provision	Score: 4
Tourism	Range and quality of attractions	Score: 2 – no real attractions
	Visitor information, signage	Score: 4

Notes and observations: (opportunities for improvements, potential development opportunity sites)
• Large numbers of tourists, coach tour parties, little attractions other than retail, art galleries. Number of cafes and tea rooms are large and increasing. • Loirston Hotel currently empty – edge of centre.

SWOT Analysis

Strengths	**Opportunities**
• Large visitor numbers, high number of independent specialist shops, distinct sense of place. • Attractive green spaces.	• Distinct town centre environment – sense of place.
Weaknesses	**Threats**
• Lack of alternative tourist attractions – retail, galleries only, TIC, museum. • Lack of choice – foodstores.	• Lack of tourist info and facilities. • Increased car parking pressures, traffic volume. • Large numbers of cafés, tea rooms – over dominant. • Seasonal visitor pull.

Inventory

Bridge Square	**Name**	**Use Class**
1.	Outreach Upper Deeside, Support Centre and Charity Shop	COM5 charity Shop
2.	La Mangiatoia	LS10 restaurant
3.	Residential	R1
4.	Alexandria Hotel	LS9 hotel
Bridge Street		
5.	Residential	R1
6.	Byzantium Furnishings	OR1other retail
7.	Aberdein Considine	FBS6 legal services
8.	HBOS	FBS 10 bank
9.	HM Sheriden	CNV12 butcher
10.	Residential – undergoing change of use to café	R1
11.	Countrywear Gunsmiths	COM30 sports, camping etc
12.	Co-operative Food Store	CNV3 convenience store
13.	Rowan Jewellery	COM19 jewellery
14.	Mikahail Pietranek	COM32 textiles etc
15.	Laurie & Co.	FBS6 legal services
16.	Brown Sugar Café	LS3 cafés
17.	Davidson's Chemists	COM6 chemists
18.	Cybernaut Internet & Computers	COM12 electrical etc
19.	A B Yule Toy shop	COM33 toys
20.	Deeside Books	COM3 booksellers
21.	Fraser & Mulligan Solicitors	FBS6 legal services
22.	2 STR8 Hairdressers	RS5 hairdressers
23.	Residential	R1

Victoria Road		
24.	Rowan Antiques & Art	COM1/COM2 antiques/art
25.	The Green Restaurant	LS10 restaurant
26.	Residential	R1
27.	Loirston Hotel - VACANT	LS9 hotel
Church Square		
28.	Cycle Highlands Bike Shop	COM9 cycles
29.	Ballater Public Convenience	N/A
30.	Glenaden Hotel	LS9 hotel
31.	Prince of Wales Pub - VACANT	LS1 bars
Golf Road		
32.	New Shanghai Chinese Takeaway	LS8 takeaway
33.	Chalmers Bakery	CNV1 bakers
34.	Stagecoach Bus Depot	N/A
35.	G Strachan Deli	CNV4 deli
36.	Bean for Coffee Café	LS3 café
37.	Delicatessen	CNV4 deli
38.	A. Cassie Hardware	COM18 hardware
39.	The Bothy Café	LS3 café
40.	The Outdoor Store	COM30 sports, camping etc
41.	D P Opticians	RS6 opticians
42.	Ballater Flowers	COM13 florists
43.	A C Yule	COM3 booksellers
Netherley Place		
44.	Balmoral Public House	LS1 bars
45.	Ballater Post Office	RS10 post offices
46.	Daisy’s Gifts – Vacant/ Hair Loft	COM17 cards/RS5
47.	B&B guest House	LS9 guest houses
48.	Co-operative Food Store	CNV3 convenience
49.	No.46 Gallery	Com2 art
50.	McEwans Clothing	COM20 clothing
Station Square		
51.	Townhall/Library/CNPA office	CIV1/CIV2
52.	Old Royal Station TIC/café/CNPA office	TOU1/LS3
53.	Dee Valley Confectionery	CNV1 confectioners
54.	E J Emslie House Furnishers	COM32 soft furnishings
55.	Bike Station Hire and Sales	COM9 cycles
56.	VACANT	
57.	B&B Guest House	LS9 guest houses
58.	McEwans at Home	COM18 household goods
Viewfield Road		
59.	Fish & Chips Takeaway	LS8 Takeaway
60.	Gift Shop - Vacant	

Grantown-on-Spey

Survey date: 17 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	4 *no*
	Independent specialist Shops	23 *no*
	Charity/discount shops (specify)	1*no*
	Range of food shopping (convenience or supermarket)	4 *no* Score: 3
	Range of shops overall	Score 3 – lack of choice of food stores
	Vacant premises rate (occupancy levels)	6 *no*
	Investment by retailers evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	Offices (financial and professional services) (specify)	8 *no*
	Cafés, tea rooms, pubs, restaurants	6 *no*
	Community/other facilities (specify)	3 (community hall, British Legion, TIC)
	Essential Rural services – post office, banks etc (specify)	4 (3 banks, post office)
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Score: 3
Environmental quality	Appearance of the environment generally	Score: 4
	Sense of place (distinctiveness and local identity)	Score: 4
	Signs of decay, decline and neglect	None
	Signs of recent investment/improvements	None
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2 – HGV's
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score: 2 – no real attractions
	Visitor information, signage	Score: 4

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Number of shops, hotels currently empty.

SWOT Analysis

Strengths	Opportunities
• High number of independent specialist shops, distinct sense of place. • Attractive green spaces, built heritage.	• Distinct town centre environment – sense of place in square, traditional high street.
Weaknesses	**Threats**
• Lack of alternative tourist attractions – TIC, museum only. • Lack of choice – food stores.	• Lack of tourist info and facilities. • Increased car parking pressures, traffic volume.

Inventory

High Street	Name	Use Class
1.	Speyside Knitwear	COM8
2.	Residential – 100 High Street	R1
3.	High Street Car Park	N/A
4.	Scissor Trix by Donna	RS5
5.	Ewe & Me Gifts	COM8
6.	Community Centre	N/A
7.	Macleod Building Ltd (office)	OFF1
8.	VACANT	
9.	Strathspey Hotel – VACANT	
10.	Kiltmaker	COM23
11.	Ewe & Me Gifts	COM8
12.	Highland Hospice Charity Shop	COM5
13.	Residential	R1
14.	Church	N/A
15.	Lloyds Pharmacy	COM6
16.	Bliss Hair/Burnett & Co	RS5/FBS6
17.	Wee Gooseberry.com	COM7
18.	Grantown Garage Ltd	COM34
19.	RBS	FBS10
20.	Ben Mohr Hotel (inc bar/bistro)	LS9
21.	Lloyds TSB	FBS10
22.	Chinatown Takeaway/Restaurant	LS8/LS10
23.	Ritchie's Gunsmiths	COM30
24.	Ann's Mill Shop	COM8
25.	Victoria Wines – VACANT	
26.	Chaplain's Coffee House	LS3
27.	Imrays Jewellers	COM19
28.	Grantown Dairy (Deli)	CNV4
29.	The Flower Box	COM13
30.	Cockburn's Solicitors	FBS6
31.	Royal Fish Bar	LS8
32.	Wishing Well Gifts	COM8
33.	Audrey's Coffee Shop	LS3
34.	Beale & Pyper – fire damaged	COM10
35.	Post Office	RS10
36.	Mortimer's Fishing Tackle	COM30

37.	HBOS	FBS10
38.	Yo! (childrenswear)	COM7
39.	Grantown News	COM25
40.	Red Ruby Blue - VACANT	
41.	Golden Grantown Chinese	LS8
42.	Animal Ark Supplies	RS7
43.	TIC	TOU2
44.	Green Fine Meats	CNV2
45.	Hair @ Mhairi's	RS5
46.	Strathy Offices	OFF1
47.	Beale & Pyper (temporary premises)	COM10
48.	Walkers Shortbread	CNV1
49.	Masson Cairns Solicitors	FBS6
50.	The Bookmark	COM3
51.	The Candy Box	CNV1
52.	Donaldson's Hardware	COM18
53.	Boyd's (Ladies fashion)	COM21
54.	Just Deli…cious (deli)	CNV4
55.	John Ross Funeral Services	FBS7
56.	Grandview House Care Home	N/A
57.	Claymore Bar	LS1
58.	Iain Moir Butchers – VACANT	
59.	Smarty Art Paint Studio	COM8
60.	Scottish Hydro Electrical	COM12
61.	Coo-perative Food Store	CNV3
62.	Thistle Bar	LS1
63.	Tyree House Hotel – VACANT	
64.	Residential	R1
65.	Residential	R1
66.	Residential	R1
67.	Residential	R1
68.	Guest House	LS9
69.	CNPA Offices	OFF1
70.	CNPA Offices	OFF1
71.	CNPA Offices	OFF1
72.	British Association Snowsports Instructors	OFF1
73.	Residential	R1
74.	Garth Hotel	LS9
75.	Shylet Fish	LS8
76.	Shylet Brasserie	LS1
77.	The Studio Photography	COM28
78.	SPAR	CNV1
79.	Macleans Bakery/Coffee Shop	CNV1/LS3
80.	Royal British Legion	LS6
81.	Residential – Stonefield House	R1
82.	Residential	R1
83.	Residential	R1
84.	Grant Arms Hotel	LS9
85.	Residential	R1
86.	Residential	R1

87.	Residential	R1
88.	Residential	R1
89.	Highland Council Service Point	FBS7

Kingussie

Survey date: 30 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	2 *no*
	Independent specialist shops	15 *no*
	Charity/discount Shops (specify)	0
	Range of food shopping (convenience or supermarket)	Score: 4
	Range of shops overall	Score: 4
	Vacant premises rate (occupancy levels)	4 *no*
	Investment by retailers (evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	offices (financial and professional services) (specify)	5*no*
	Cafés, tearooms, pubs, restaurants	10 *no*
	Community/other facilities (specify)	0
	Essential rural services – post office, banks etc (specify)	2 – bank, post office
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Scores 3
Environmental quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	Score: 3
	Signs of recent investment/improvements	Score: 3
Accessibility	Quality and frequency of public transport	Not known
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score: 2 – TIC only
	Visitor information, signage	Score: 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Busy through Traffic, lack or services and facilities, good range of hotels, cafés and guest houses.

SWOT Analysis

Strengths	Opportunities
• Tourist trade, some offices.	• Vacant Sheriff Court building. • Through traffic issues.
Weaknesses	**Threats**
• High Street parking. • Lack of facilities.	• HGV volume, tourism dependent.

Inventory

High Street	Name	Use Class
1.	Highland Council Planning & Building Standards, 100 High Street	Off
2.	Residential	R1
3.	Residential	R1
4.	Residential	R1
5.	Residential	R1
6.	Residential	R1
7.	Bake & Take Café	LS3
8.	Residential	R1
9.	Tool Shop	COM18
10.	Residential	R1
11.	Residential	R1
12.	The Tipsy Laird Hotel (bar & restaurant)	LS9
13.	Residential	R1
14.	Robertson & Co. Solicitors & Estate Agents	FBS6
15.	Residential	R1
16.	Be@Home Internet Shop	COM27
17.	Pam's Coffee Shop	LS3
18.	Residential	R1
19.	Residential	R1
20.	McIntosh Gallery/Flying Carpets	COM2/COM32
21.	Sheriff Court - VACANT	
22.	B&B	LS9
23.	Happy Days Takeaway/Breakfast Bar	LS8
24.	Trading Post Hardware	COM18
25.	Gilly's Kitchen Café	LS3
26.	VACANT	
27.	Residential	R1
28.	VACANT	
29.	Kingussie Chinese Takeaway	LS8
30.	Residential	R1
31.	Gow's Garage	RS14
32.	Co-operative Food Store	CNV3
33.	Residential	R1
34.	Residential	R1
35.	Something Different (furnishers)	COM32
36.	Strathy Offices	OFF1

37.	Café Volanto Takeaway	LS8
38.	P Munro & Co. Accountants	FBS5
39.	Police Station	
40.	Residential	R1
41.	HBOS	FBS10
42.	HBOS	FBS10
43.	Highland Council Offices	OFF1
44.	Allt Gynack Guest House	LS9
45.	Star Hotel (bar & restaurant)	LS9
46.	NK Collection (gifts)	COM8
47.	Post Office	RS10
48.	Service Sports	COM30
49.	Murchie's Grocers of Kingussie	CNV3
50.	Boots Pharamacy	COM6
51.	Country Harvest Florist	COM13
52.	Northern Vacuum Cleaner Services	COM12
53.	Caberfeidh Bookshop/TIC	COM3/TOU2
54.	Caberfeidh Bookshop/TIC	COM3/TOU2
55.	Creativity Gifts	COM8
56.	VACANT	
57.	Riverside Laundrette	RS2
58.	Duke of Gordon Hotel (bar)	LS9
59.	Osprey Hotel	LS9
60.	West End Garage	RS14
61.	Kingussie Primary School	
62.	The Silver Fjord Hotel	LS9
63.	The Paper Shop	COM25
64.	George Gow Butchers	CNV2
65.	King Art Gallery & Frames	COM2
66.	Unisex Salon	RS5

Newtonmore

Survey date: 30 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	1 *no*
	Independent specialist shops	4 *no*
	Charity/discount shops (specify)	4 *no*
	Range of food shopping (convenience or supermarket)	Score: 3 – Convenience
	Range of shops overall	2 *no*
	Vacant premises rate (occupancy levels)	3 *no*
	Investment by retailers (evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	offices (financial and professional services) (specify)	0
	Cafés, tearooms, pubs, restaurants	6 *no*
	Community/other facilities (specify)	1 *no*
	Essential rural services – post office, banks etc (specify)	post office
	Range and diversity of uses overall	Score: 2
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Scores: 3
Environmental quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	Score: 3
	Signs of recent investment/improvements	none
Accessibility	Quality and frequency of public transport	Score: 3
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2
	Car parking provision	Score: 2 – parking on Main Road
Tourism	Range and quality of attractions (specify)	Score: 2 – TIC only
	Visitor information, signage	Score: 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Parking on south side of Main Street – prohibits traffic and leads to amenity issues, high level of tourist accommodation.

SWOT Analysis

Strengths	Opportunities
• High level of tourist accommodation.	• High level of residential in Main Street. • Diversity of uses.
Weaknesses	**Threats**
• Overly strong tourist focus. • No offices. • No services.	• Strong focus on tourism. • Lack of offices.

Inventory

Main Street	Name	Use Class
1.	Clan Macpherson House and Museum	Tou1
2.	The Glen Hotel (bar & restaurant)	LS9
3.	Harris Tweed and Highland Shop	COM8
4.	Mains House Care Home	
5.	Residential	R1
6.	Residential (former hotel)	R1
7.	Residential	R1
8.	Newtonmore Hostel	LS9
9.	Residential	R1
10.	Residential	R1
11.	VACANT	
12.	Residential	R1
13.	Braeriach Hotel	LS9
14.	Residential	R1
15.	Residential	R1
16.	Residential	R1
17.	Residential	R1
18.	Residential	R1
19.	Residential	R1
20.	Residential	R1
21.	Residential/Mini Mischief (kids clothes)	R1/COM7
22.	Residential	R1
23.	Co-operative Food Store	CNV3
24.	Residential	R1
25.	Residential	R1
26.	Residential	R1
27.	Residential	R1
28.	Newtonmore Crafts/ Café	COM8/LS3
29.	Residential	R1
30.	Residential	R1
31.	VACANT	
32.	Funeral Directors	OFF1
33.	Residential	R1
34.	Pantry Tearooms and Bistro	LS3
35.	Residential	R1
36.	Residential	R1
37.	Residential	R1

38.	Residential	R1
39.	Wildcat Centre	TOU1
40.	Community Hall	
41.	Residential	R1
42.	VACANT	
43.	Toshac's Tea Room	LS3
44.	Residential	R1
45.	Blasta Restaurant	LS10
46.	Blythswood Care Charity Shop	COM5
47.	Residential	R1
48.	Post Office	RS10
49.	Bike Shed	Com9
50.	Main Supply (electrical)	Com11
51.	Newtonmore Primary School	
52.	Strathspey Mountain Hotel	LS9
53.	Residential	R1
54.	Residential	R1
55.	Residential	R1
56.	Balavila Hotel	LS9
57.	Waltzing Waters	TOU1
58.	Maureen Hairdressers	RS5

Appendix 2 – Aberdeen City and Shire Employment Land Audit 2010 (extract)

ABERDEEN
CITY AND
SHIRE

Employment Land Audit 2010

A joint publication by Aberdeen City Council, Aberdeenshire Council and Scottish Enterprise for Aberdeen City and Shire Economic Future

Employment Land Audit 2010

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Published 2010

1. Introduction

1.1 Purpose of Audit

1.1.1 The Aberdeen and Aberdeenshire Employment Land Audit has been prepared to bring together into one source document up-to-date and accurate information on the supply and availability of employment land in the North East of Scotland.

1.1.2 The information has been produced to assist Aberdeen City and Shire Economic Future (ACSEF) in the preparation of economic strategy and policy making and in the implementation of action plans, as well as to alert them to areas where further research and analysis is required (*see section 2.1.2*). The statistics contained within the audit also help the two planning authorities in the monitoring of the policies and proposals included within their structure and local plans.
In addition the information is of interest to companies, developers and other organisations with a requirement for or interest in employment land in the North East of Scotland.

1.1.3 Officials of Aberdeen City and Aberdeenshire Council and Scottish Enterprise together with representatives of the private sector (all members of ACSEF's Employment Land Working Group) have prepared the audit for ACSEF. Reference was also made to relevant information from the private sector. This has helped ensure the provision of a robust and comprehensive source document for employment land supply to assist in delivering the future prosperity of the North East of Scotland. The audit is produced on an annual basis, this being the tenth in the series, the first having been published in October 2001.

2. Background

2.1 Scottish Strategies and Policies

2.1.1 The Government Economic Strategy, published in November 2007, sets out the broad agenda for the Government's focus on Scotland's economy, thus creating:

"A more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth".

Growing the economy is the top priority. A successful economy is seen as the key to future prosperity; ensuring current and future generations enjoy a better quality of life. In order to deliver sustainable economic growth, the Strategy identifies five 'Strategic Priorities' that are internationally recognised to be critical to economic growth. These are identified as:

- Learning, Skills and Well-Being
- Supportive Business Environment
- Infrastructure Development and Place
- Effective Government
- Equity

2.1.2 The Economic Manifesto for Aberdeen City and Shire was published by ACSEF in 2007 and sets out a vision and strategic priorities for the region to work towards by 2025. It identifies eight priorities, the first being for Aberdeen City and Aberdeenshire to be the top of the Quality of Life 'league table', making this a place where people choose to work, live study and visit. The remaining seven are:

- Deliver a fully integrated transport network
- Maximise our intellectual capital - people and expertise
- Deliver city centre redevelopment
- Anchor the oil and gas industry

- Attract and develop skilled people
- Improve the efficiency of planning decision making
- Aberdeen City and Shire as the location of choice for company headquarters

For the penultimate strategic priority, success by 2025 would include having:

'an adequate supply of land maintained for employment and housing purposes' by 2025.

2.1.3 An increase in the supply of marketable employment land has therefore been highlighted as an action point for ACSEF to address and the Audit is used to inform this process.

The Scottish Government published the National Planning Framework 2 (NPF2) on 12 December 2008. The NPF2 aims to guide Scotland's spatial development to 2030 and sets out strategic development priorities to support the Scottish Government's promotion of sustainable economic growth. The Government Economic Strategy makes clear that financial and other resources will be aligned to ensure that policy development and spending programmes are sharply focused on the delivery of that purpose and on achieving the challenging targets the Government is setting. To provide a clear focus for delivery, the Government has set the following strategic objectives:

- **Wealthier and Fairer:** enable businesses and people to increase their wealth and more people to share fairly in that wealth;
- **Greener:** improve the natural and built environment and the sustainable use and enjoyment of it;
- **Safer and Stronger:** help local communities to flourish, becoming stronger, safer places to live, offering improved opportunities and a better quality of life;
- **Smarter:** expand opportunities to succeed from nurture through to life-long learning, ensuring higher and more widely shared achievements; and
- **Healthier:** help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care.

This Framework will take forward the spatial aspects of the Government Economic Strategy, to ensure that each part of the country is able to play to its strengths in building a Scotland that is wealthier and fairer, smarter and greener, healthier, safer and stronger. Infrastructure development and place will be key priorities.

2.1.4 Aberdeen and Aberdeenshire are applying their energy sector and offshore strengths to the development of renewable and clean energy technologies. Aberdeen is focusing on strengthening its role as Scotland's northern gateway and broadening its economic base. The City Council is focusing on improving the quality of the environment in the city centre and developing cultural and recreational facilities to create a more vibrant social scene. There is scope for attracting more tourists to the city and expanding the service sector, including financial services. The city's role as a regional media centre provides a base from which to build a larger creative sector.

2.1.5 In Aberdeenshire, the Energetica project envisages attractive development propositions which will impact on residential and commercial sites along the A90 corridor from Bridge of Don to Peterhead.

2.1.6 The Scottish Government's planning policy for economic development is set out in Scottish Planning Policy published in February 2010. This asks Councils to respond to the diverse needs and locational requirements of different sectors and sizes of businesses and take a flexible approach to ensure that changing circumstances can be accommodated and new economic opportunities realised. Removing unnecessary planning barriers to business development and providing scope for expansion and growth is seen as essential. The planning system should also be responsive and sufficiently flexible to accommodate the requirements of inward investment and growing indigenous firms. Planning authorities should ensure that there is a range and choice of marketable sites and locations for businesses allocated in development plans, including opportunities for mixed use development, to meet anticipated requirements and a variety of size and quality requirements. Marketable land should meet business requirements, be serviced or serviceable within 5 years, be accessible by walking; cycling and public transport, and have a secure planning status. The supply of marketable sites should be regularly reviewed.

The audit provides a useful tool for ACSEF to measure performance against some of the requirements of Scottish Planning Policy and the Structure Plan (*see paragraph 2.2.1*).

2.2 Aberdeen City and Shire Structure Plan

2.2.1 The Aberdeen City and Shire Structure Plan was approved by Scottish Ministers in August 2009. The Plan, which sets out a strategic framework for the management of land in the North East up to 2030, requires the emerging Aberdeen and Aberdeenshire Local Development Plans to identify land for business and industrial uses throughout the plan periods.

2.2.2 Specific amounts are stated for 'strategic growth areas' (*see Appendix 5*), with flexibility for Aberdeenshire Council to determine an appropriate mechanism for 'local growth and diversification' areas. Business and industrial development rates are to be monitored on an annual basis by ACSEF to ensure continuity of land supply. In this respect the audit contributes to the monitoring requirements of the Structure Plan.

2.2.3 The targets under the economic growth objective of the Structure Plan include: to make sure there is at least 60ha of land immediately available to businesses at all times in a range of places within Aberdeen City as well as 60ha in the strategic growth areas within Aberdeenshire.

2.3 Aberdeen City and Aberdeenshire Local Plans

2.3.1 The Aberdeen City and Shire Structure Plan 2009 seeks "to provide opportunities which encourage economic development and create new employment in a range of areas that are both appropriate for and attractive to the needs of different industries..." Local plans for Aberdeen City and Aberdeenshire are required to identify new employment land allocations and identify strategic reserve land to meet this objective.

2.3.2 The Aberdeen City Local Plan was adopted in June 2008. Work is currently underway on the Aberdeen Local Development Plan. The Proposed Plan is due to be published for consultation on 24th September 2010 for a 12 week period.

2.3.3 The Aberdeenshire Local plan was adopted in June 2006. Preparation of the Aberdeenshire Local Development Plan is in progress and a proposed plan was published in July 2010.

2.3.4 The new and existing employment land sites allocated in the adopted Aberdeen City and Aberdeenshire Local Plans have been included in the audit. The audit also includes land not allocated in local plans but which has an existing planning consent and is thus included as part of the established land supply in the 2010 Employment Land Supply tables in *Appendices 2 and 3*. The audit supports the monitoring requirements of the two Local Plans.

2.4 Existing Employment Land Monitoring Arrangements

2.4.1 The Audit is a record of the employment land supply in Aberdeen City and Shire at a given date. It shows the supply of marketable land as defined by SPP. It does not provide information on the range and size of sites nor does it provide detailed information on vacant land within existing, completed sites. It is envisaged that the audit will help provide a useful cross-check with Agents' Reviews and the Scottish Property Network regarding up-to-date information on sites and properties in the area and highlight to ACSEF, areas where further work may be required. In future years, information will be provided on the range of quality and size of sites.

3. Employment Land Audit 2010

3.1 Preparation of Audit

3.1.1 The audit is prepared from information gathered by officials from both Councils, through their monitoring of planning approvals and individual site inspections. The information is kept up-to-date throughout the year and the status of sites checked and agreed with Scottish Enterprise and information published by the private sector, as appropriate. The base date for the published data is 1 April 2010. All figures are given in hectares and are net areas unless otherwise stated.

3.2 Employment Land Supply

3.2.1 Several categories of land supply are identified in the audit. *Appendix 1* provides a list of definitions used for these categories. It is important that definitions are consistent for long-term monitoring and comparative purposes. For this reason definitions are taken from the former SPP2 as these are the only source of definitions at this stage and the adopted standard for use across most Local Authorities. Information on established, constrained, marketable and immediately available employment land supply is given in full in *Appendices 2 and 3*. The information has been divided by area (Aberdeen City and Aberdeenshire - *see Figure 1*) and includes details of site area and location, developer, constraints and servicing status. *Appendix 4* contains information collated at 3 different geographical areas radiating from the city and referred to as zones 1, 2 and 3. *Appendix 5* presents the information for Aberdeenshire by strategic growth areas. *Appendix 6* contains information on historical employment land take-up rates in Aberdeen City and Aberdeenshire.

Figure 1 - Aberdeen City and Aberdeenshire

3.3 Established Employment Land Supply

3.3.1 The established employment land supply for Aberdeen City and Aberdeenshire is shown in *Figure 2*.

Figure 2 - Established Employment Land Supply 2009 and 2010 (net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	217	211	-3.0%
Aberdeenshire	349	351	+0.6%
TOTAL	566	562	-0.7%

3.3.2 In Aberdeen City the level of established land supply still remains high due to the allocation of land at Findlay Farm and Berryhill/Cloverhill at Bridge of Don, Stoneywood and extensions to existing sites at Dyce Drive, and Altens. The amount of established land in Aberdeen City has decreased by 6.5 hectares over the last year primarily as a result of developments currently underway on land at Aberdeen Gateway, Altens East, Science and Energy Park at Bridge of Don and Dyce Drive.

3.3.3 In Aberdeenshire the total area of established land has risen by 2 hectares over the last year. This is the net result of a significant addition (14ha) at Kintore (Midmill), offset by land being developed at sites in Fraserburgh and Inverboyndie as well as sites at Mintlaw and Belhelvie being no longer available for development. Demand for quality land in Aberdeen City and the surrounding towns has decreased over 2009 and is reflected in the low under construction figures. Reassessments of some sites capacities have also affected the total areas.

3.3.4 In addition to the sites included in the Audit there are also three further development sites allocated in the Aberdeenshire Local Plan which could be used for employment uses. The first of these is at the former RAF base at Edzell Woods which comprises 150 hectares of land for redevelopment. The site has been allocated for mixed use within Aberdeenshire Local Plan but has been excluded from the Audit until a development brief has been produced outlining the area which could be used for employment use. Two further employment land allocations have been earmarked in the Aberdeenshire Local Plan for potential development; these are at North Collielaw and St Fergus Gas Terminal. Both sites cover large areas of land, however development must meet Policy Emp\\11: Major Oil and Gas sites and therefore the sites have been excluded from this Audit.

3.4 Constrained Employment Land Supply

3.4.1 Land that is subject to constraints in Aberdeen City and Aberdeenshire is shown in *Figure 3*.

Figure 3 - Constrained Employment Land Supply 2009 and 2010 (net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	103	103	0.0%
Aberdeenshire	134	130	-3.0%
TOTAL	237	233	-1.7%

3.4.2 The amount of constrained land in Aberdeen City remains the same as last year.

3.4.3 The amount of constrained land in Aberdeenshire has decreased by approximately 4 hectares since April 2009. This is mainly as a result of the sites at Mintlaw and Belhelvie being no longer available for development, offset by additions to the constrained supply at Fraserburgh. It is anticipated that infrastructure constraints at large sites at Badentoy and Marywell will be addressed in the near future. If so a further 50ha could become marketable and available for development.

3.4.4 In Aberdeen City some 49% of the established land supply is constrained whilst in Aberdeenshire the figure is 37%. This is perhaps a reflection of greater infrastructure difficulties associated with delivering sites in urbanised areas such as Aberdeen which tend to be larger than those in Aberdeenshire.

3.4.5 It should be noted that land at the Aberdeen Science and Technology and Science and Energy Parks and land at Findlay Farm at Bridge of Don whilst not marketable, due to use restrictions there, is not considered to be constrained and therefore only features as part of the established land supply (*see Glossary* - Marketable Land Supply).

3.5 Marketable Land Supply

3.5.1 The marketable land supply in 2010 is shown in *Figure 4*.

Figure 4 - Marketable Land Supply 2009 and 2010
(net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	91	88	-3.0%
Aberdeenshire	215	212	-1.4%
TOTAL	309	300	-2.9%

3.5.2 Marketable land supply in Aberdeen City has fallen slightly between 2009 and 2010. The net fall in Aberdeenshire is a result of land becoming constrained at a number of small sites in Banff & Buchan, offset by an addition to the supply at Kintore (Midmill).

3.5.3 The supply of land in Aberdeen City and key Aberdeenshire settlements still gives cause for concern in terms of the choice of sites currently available. Reference is made in *section 4* of the Audit to steps being taken by ACSEF to improve the situation. Aberdeen City and Aberdeenshire do currently have an adequate supply of marketable land but choice is limited in some areas. Demand for land in Aberdeenshire tends to be in those settlements concentrated around Aberdeen City such as Westhill, Inverurie and Portlethen and as a result employment land in these areas is taken up quickly while large allocations of land in the North are taken up at a slower rate.

3.6 Immediately Available Land Supply

3.6.1 The immediately available land supply for 2010 is shown in *Figure 5*.

Figure 5 - Immediately Available Land Supply 2009 and 2010 (net figures in hectares)

Employment Area	2009	2010	Change
Aberdeen City	31	28	-10.0%
Aberdeenshire	42	47	+12.0%
TOTAL	73	75	+2.7%

3.6.2 The supply of immediately available land in Aberdeen City has decreased by 10% (3.3 hectares) largely as a result of developments at Aberdeen Gateway and Altens East.

3.6.3 In Aberdeenshire there has been an increase of similar proportion in the level of immediately available land, due entirely to the addition at Kintore (Midmill).

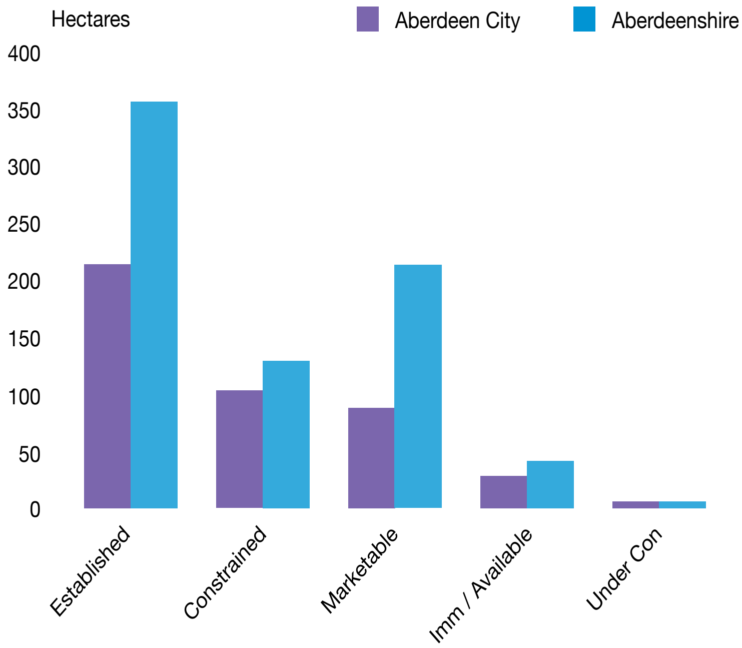
3.6.4 Some 37% of all immediately available land is located within Aberdeen City, reflecting greater demand and therefore a lesser risk attached to speculative land development in and close to Aberdeen.

3.6.5 The immediately available land supply falls short of the Structure Plan targets of 60ha in both Aberdeen City and Aberdeenshire. However, the new Local Development Plans will allocate significant new employment land so the immediately available land supply is expected to reach these targets in subsequent years.

3.6.6 Land under construction is not included in the above categories, as it is neither available nor considered as developed. On completion it will, however, be reflected in the historical development rates for next year's audit. Land under construction is identified in *Appendices 2 and 3* of the Audit. At the beginning of 2010 there were 3.2 hectares of employment land under construction in Aberdeen. In Aberdeenshire some 3.6 hectares of land were under construction.

3.6.7 *Figure 6* gives a summary of the amount of land in Aberdeen City and Aberdeenshire which falls into each of the supply categories.
NB: The Established Land Supply column represents the total supply of land in the corresponding area.

Figure 6 - Employment Land Supply Summary 2010



Appendix 1: Glossary

Brownfield Sites

Land which has been built on or used in the past for some development purpose. Brownfield land does not include private or public gardens, sports pitches, woodlands or open spaces used for leisure and recreation purposes. The grounds of institutions (such as schools and hospitals) that are no longer used are not considered as brownfield sites.

Constrained Employment Land Supply (Const)

This includes land for example, that has planning difficulties, land subject to ownership difficulties (eg multiple ownership/unwilling sellers), land subject of local plan objections, land with insufficient infrastructure provision, etc. This category therefore includes much of the land in the Established Employment Land Supply that is not Marketable (see below).

Development Rates

These refer to the sum of the net area of employment land that has been developed in a particular year. A site is considered to be developed once the first building has been constructed, even though further building may take place within the same site at a later date.

Employment Land

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

Established Employment Land Supply (Estab)

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

Greenfield Sites

Sites which have never been previously developed, or are fully restored derelict land.

Gross

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

Immediately Available Land Supply (Imm/Avail)

This is marketable land that currently has planning permission, is serviced and has no other major constraints to immediate development. This definition is useful in the assessment of whether demand for land is being adequately met.

Marketable Land Supply (Market)

This is land that as well as meeting business requirements, has a secure planning status, can be serviced within 5 years, is accessible by walking, cycling and public transport as defined by SPP. It is incumbent on the two planning authorities to ensure that a supply of marketable land is available throughout their areas at any one time, as set down in the Structure Plan. Land that is subject to user restrictions or that is held as 'option land' for existing companies' own expansion cannot be considered to be marketable. Such land is not constrained.

Net

The total area of land excluding roads, landscaping etc. The net area will vary depending on both the physical characteristics of the site and surrounding land uses, as this will determine the area of land suitable for development and the extent and type of landscaping required. For sites that are complete, the net area given is the area that has actually been developed. For sites that have undeveloped land the net area is estimated. This estimate is based on the assumption that on average, 20% of available land will be taken up with roads, landscaping and so on. If relevant site information is available, this is taken into account in the estimate.

Serviced (Ser)

The area of undeveloped land for which servicing tenders have been approved for internal sewers.

Under Construction (UC)

Sites where development has commenced but has not yet been completed.

REF	LOCATION (GRID REF)	DEVELOPER	COMMENTS	SER	ESTAB	CONST	MARKET	IMM/ AVAIL	UC
MARR									
Aboyne									
M/AB/E/004	Aboyne West (3511 7989)	Private		No	3.7	0.0	3.7	0.0	0.0
Alford									
M/AF/E/002b	Alford Business Park (3581 8598)	Kirkwood Homes/ Aberdeenshire Council		Part	2.9	2.0	0.9	0.9	0.0
Ballater									
M/BL/E/002	Tullich Road (3374 7960)	Aberdeenshire Council		Yes	0.4	0.0	0.4	0.4	0.0
Banchory									
M/BN/E/002	Hill of Banchory (3715 7967)	Bancon Devs		Yes	7.0	0.0	7.0	4.5	0.0
M/BN/E/003	Hill of Banchory East (3719 7967)	Bancon Devs		Part	5.4	0.0	5.4	0.0	0.0
Huntly									
M/HT/E/002	Depot Road (3521 8394)	RB Farquhar	Infastructure Restrictions	Part	1.6	0.0	1.6	0.0	0.0
M/HT/E/004a	Muckle Torry Hilock North (3520 8402)	Private/Aberdeenshire Council	Infastructure Restrictions	Yes	2.0	2.0	0.0	0.0	0.0
M/HT/E/005	Mart (3591 8393)	Private	Infastructure Restrictions	No	3.3	0.0	3.3	0.0	0.0
Kincardine O'Neil									
M/KN/E/001	Kincardine O'Neil - Dee Street (3591 7996)	Private		No	0.5	0.0	0.5	0.0	0.0
Lumsden									
M/LD/E/002	Lumsden (3561 8122)	Private		No	0.3	0.0	0.3	0.0	0.0

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Appendix 3 – Development Land for Commercial and Industrial Use

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:

Ryden LLP

Moray House

16-18 Bank Street

Inverness

IV1 1QY

April 2011

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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 Kincraig. 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 Kincraig 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 Kincraig 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 km² 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, Kincraig, 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).

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

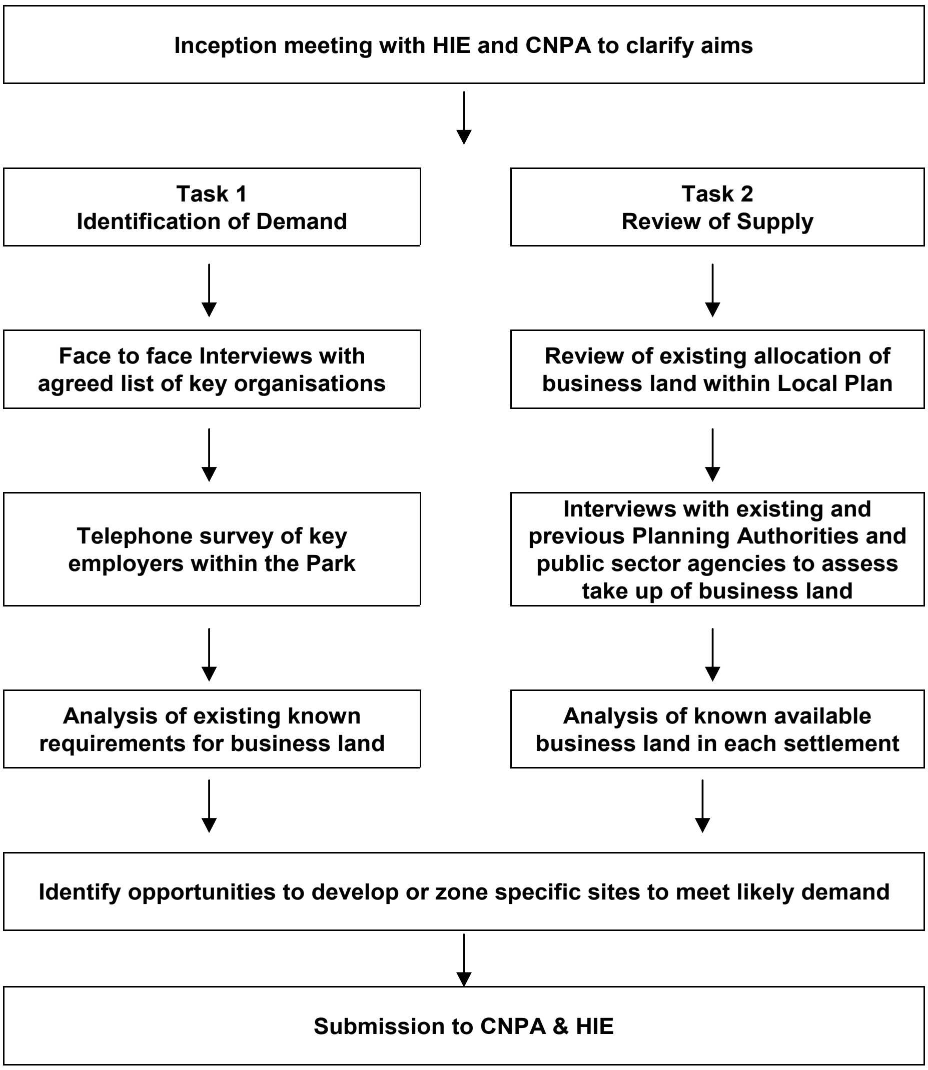
2.1 Aims

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.cairngorms.co.uk) 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 off-set 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 Kincraig. 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 Kincraig. 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 Kincraig 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 ft² 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 ft² 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 Kincraig but if this is unsuccessful they may have a requirement to relocate.	Assume 0.2 acre site to accommodate a building of 3,000 ft² to 4,000 ft² plus car parking	Kincraig
		Total: 12 to 12.5 Acres	

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 Kincraig. 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

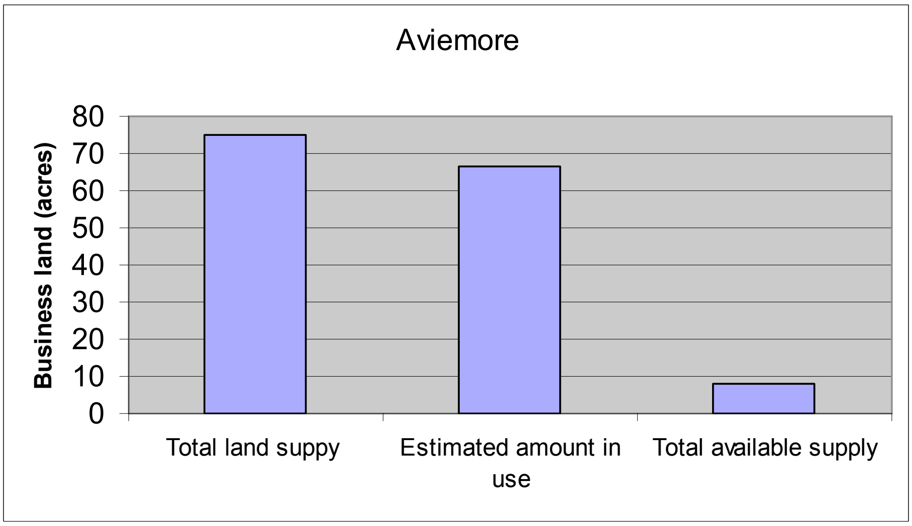
5.1 Review of Existing Allocation within the Local Plan

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

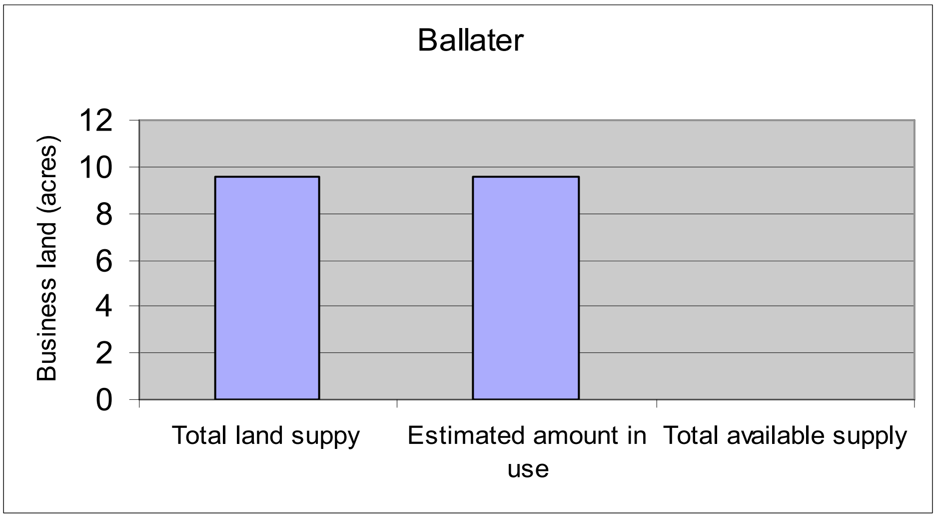
5.2.1 We set out below graphs showing the existing supply and availability of commercial and industrial land within each of the settlements.

5.2.2 <u>**Aviemore**</u>



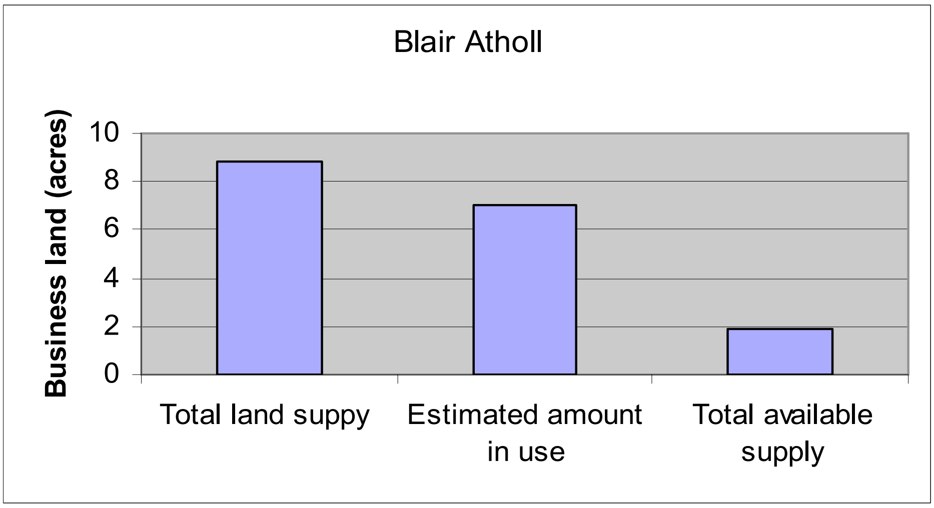
5.2.3 We estimate there is 8.24 acres of commercial and industrial land available for development. This excludes any of the additional commercial buildings listed in Appendix 4.0. The bulk of this land is contained within Cairngorms Technology Park and the allocation of commercial land in the former 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.

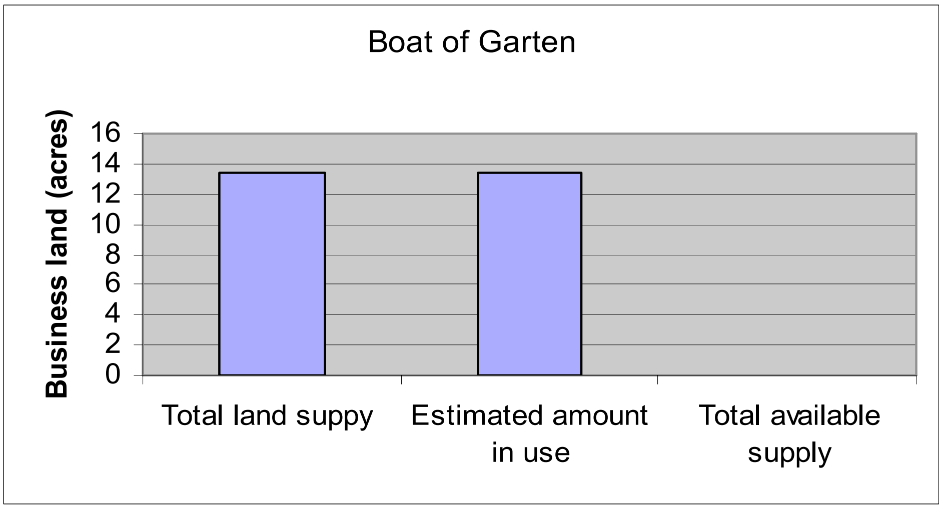
5.2.6 **Blair Atholl**



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.

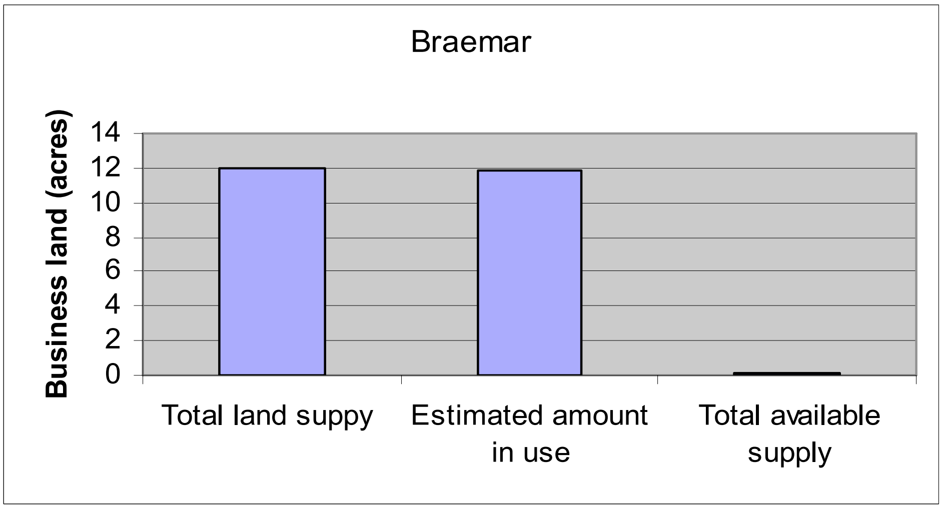
CNPA/HIE

5.2.8 **Boat of Garten**



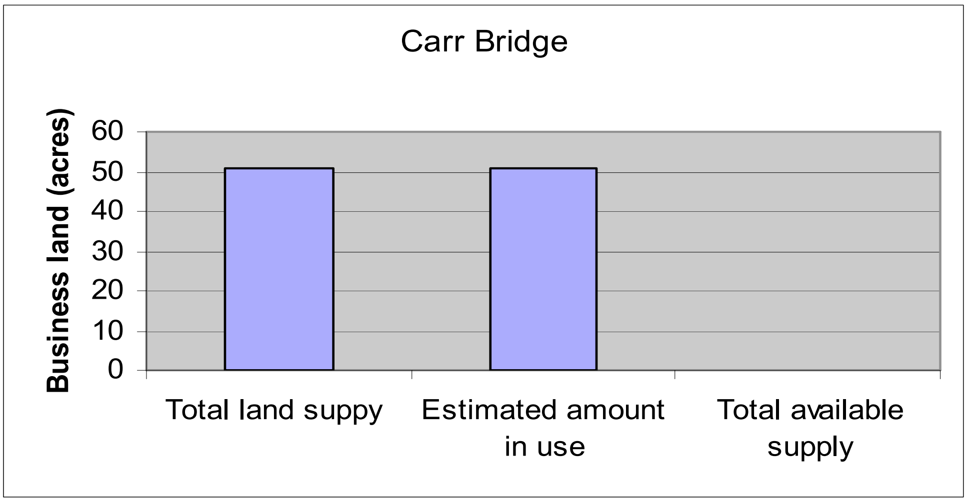
5.2.9 There is no available commercial or industrial land within Boat of Garten.

5.2.10 **Braemar**



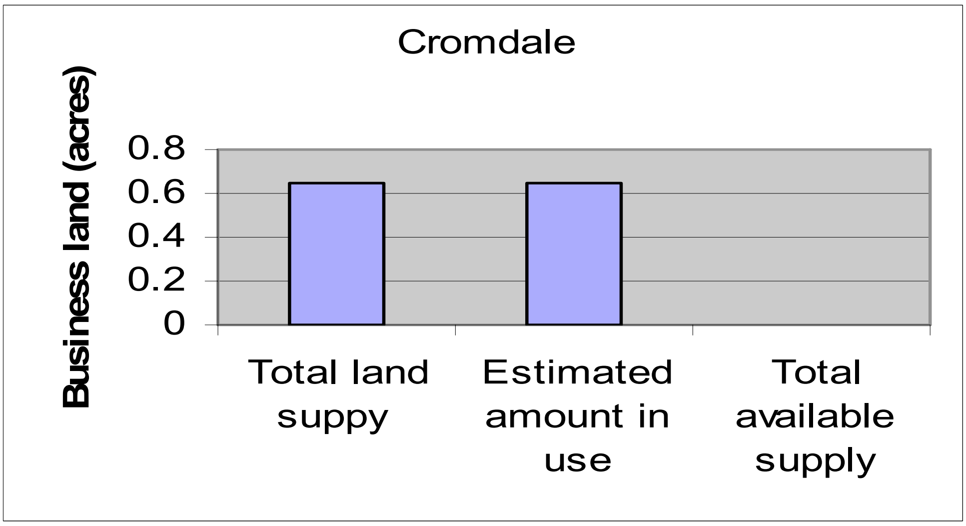
5.2.11 We estimate there is 0.725 acres of commercial or industrial land available within Braemar. This comprises the former Council Depot on Castleton Place.

5.2.12 **Carrbridge**



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

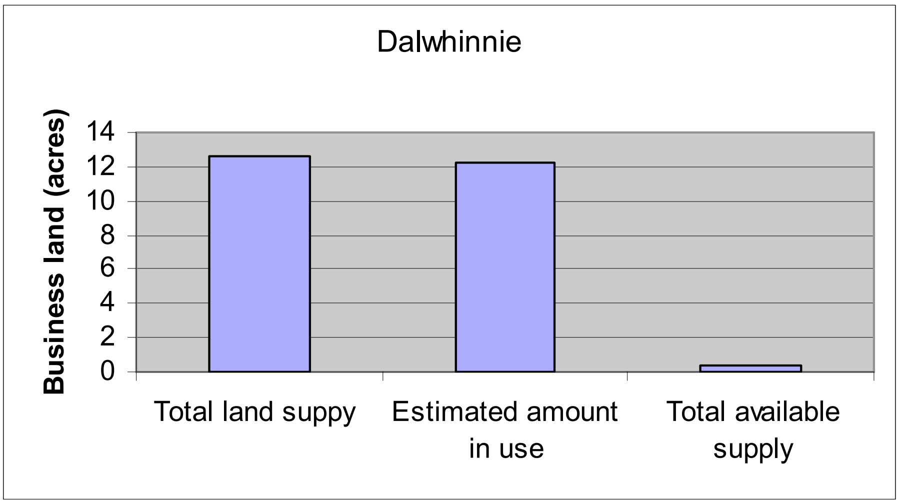
5.2.14 **Cromdale**



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

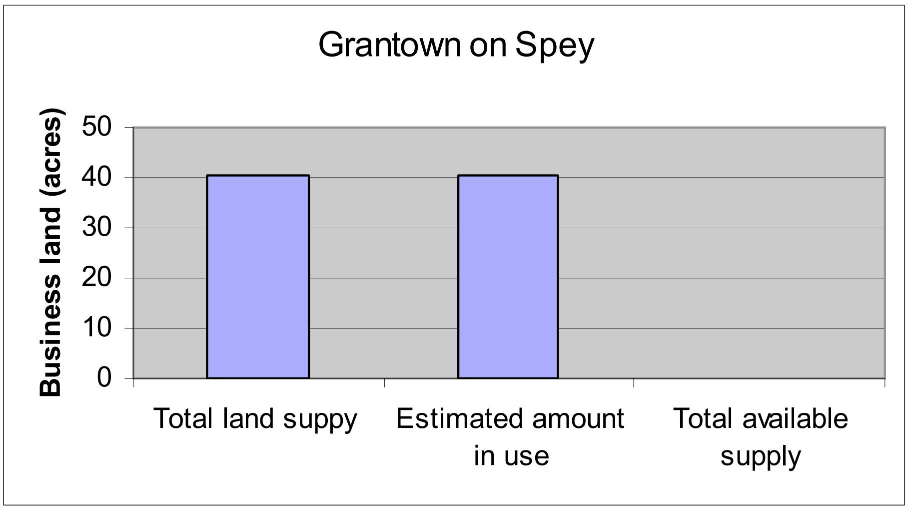
CNPA/HIE

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.

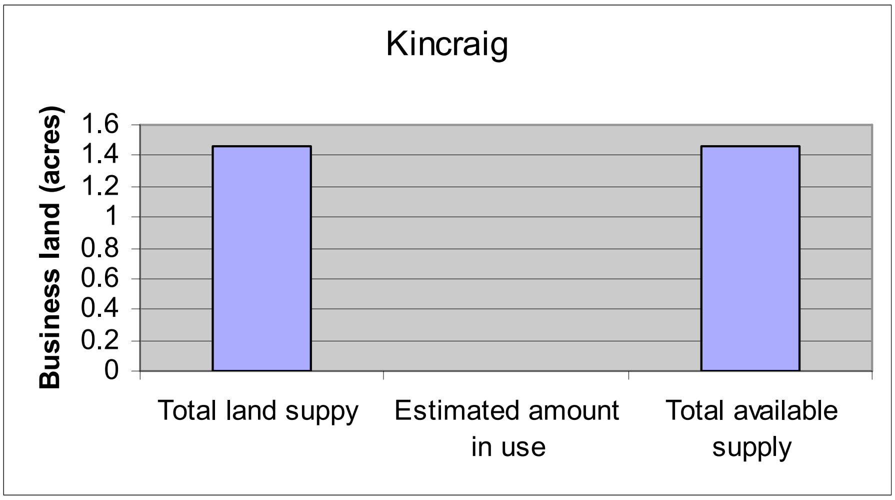
5.2.18 **Grantown-on-Spey**



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).

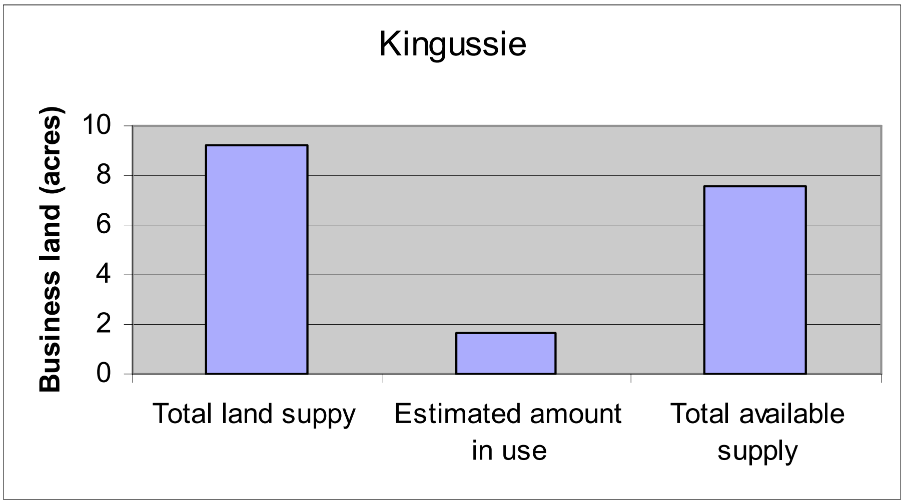
A private developer, Willburn Homes is marketing a site within Strathspey Industrial Estate for the development of 4 eco office pods extending between 1,000 and 2,000 sq ft each. No pods have been constructed but they are available for sale or lease.

5.2.20 **Kincraig**



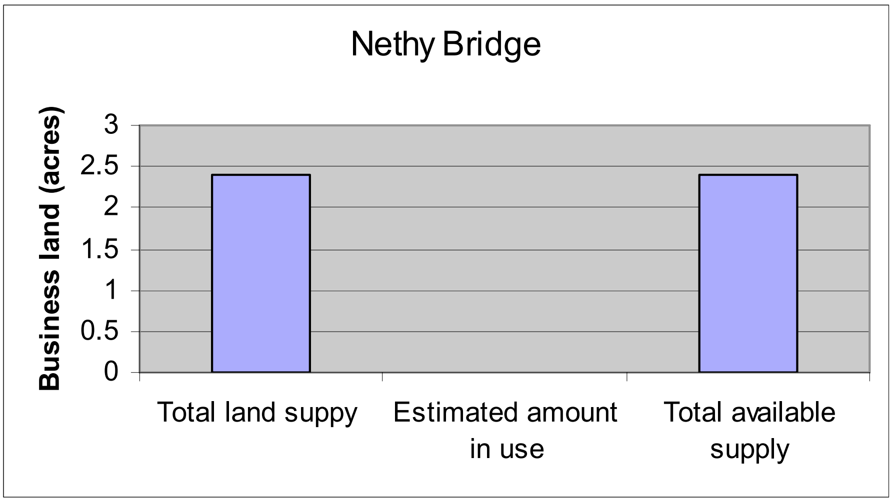
5.2.21 We estimate there is currently 1.46 acres of commercial and industrial land available in Kincraig. This is all located at Baldow Smiddy. Alvie Estate have advised us that they may potentially have a use for the vacant warehouse building plus the land. Therefore the site may become occupied in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

5.2.22 **Kingussie**



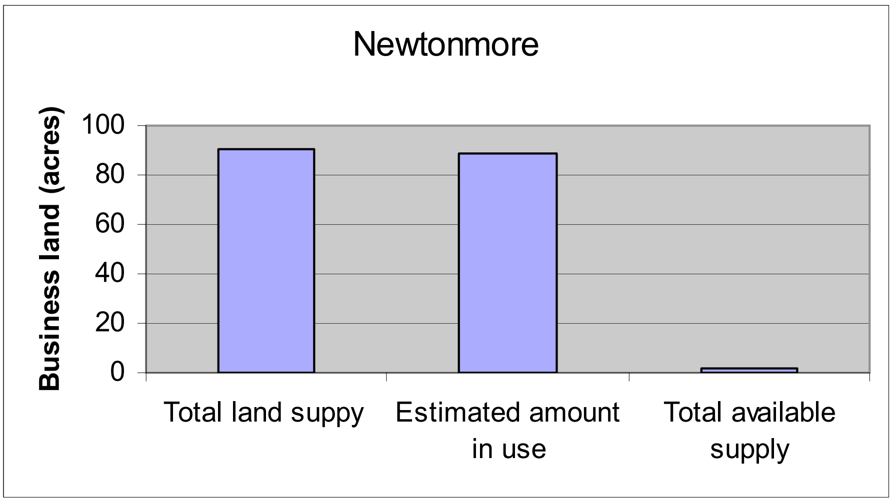
5.2.23 We estimate that there is 7.55 acres of commercial or industrial land available within Kingussie. This comprises land at Spey Street next to the former Highland Folk Museum. Part of this site is a public car park with mature trees at the side. It would seem to be capable of development. The majority 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.

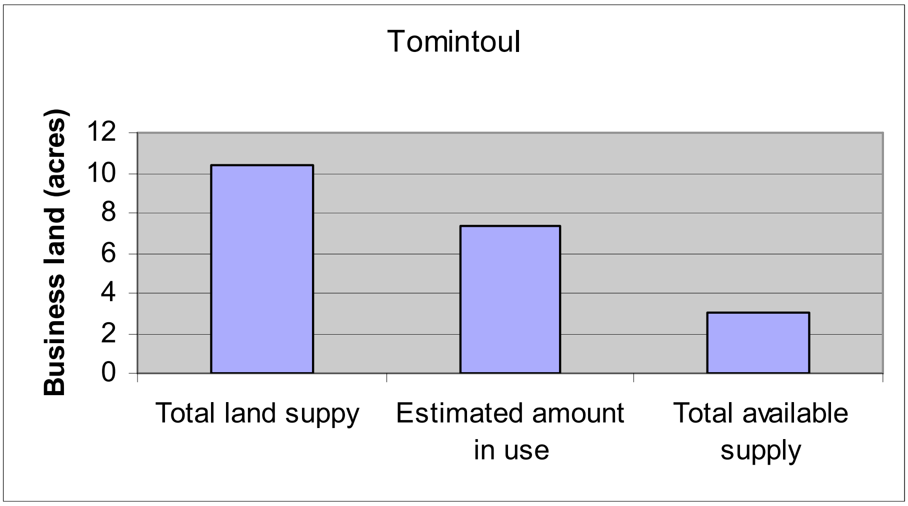
5.2.26 **Newtonmore**



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.

CNPA/HIE

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
TOTALS:	**337.00**	**308.965**	**28.035**

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 lettability.

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
TOTALS:	**337.00**	**308.965**	**28.035**	**8.2 ****

* * 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 ft² 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 ft² to 40,000 ft² 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 ft² 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, Kincraig, Dalwhinne 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 ft² to 4,000 ft² per annum based on a ratio of 40% site cover. Nethybridge and Kincraig have capacity. Dalwhinnie has some. We attach plans in Appendix 5.0 highlighting potential sites in Cromdale and Dalwhinne. 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

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 Kincraig 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 Kincraig Kingussie PH21 1NE	Smokehouse Alvie Estate Kincraig 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, ¾ 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	The estate experiences a good demand for business space, this has decreased slightly in the last few years with the recession. They are currently working on the Local Development Plan process to promote land for development. 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.

Telephone Interview List: Key Private and Public Sector Employers

				In terms of development they would only develop a hand full of units at one time and drip these into the market. 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. A concern is the availability of broadband.
James Jones & Son Ltd	James Jones & Son Ltd Timber Merchants Broomage Avenue Larbert Stirling FK5 4NQ	Sawmill Burnroot Dinnet Aboyne AB34 5PN		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. 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. The site at Burnfoot has a 10 year life expectancy. If the right location for relocation came up they would be interested to know about it. The cost of relocation would be in the region of £24-30million. 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.

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	Kincraig Kingussie Inverness-shire PH21 1NU	Kincraig 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.

List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
Neil Prentice Senior Service Manager Angus Council Economic Development County Buildings Market Street Forfar DD8 3RE	01307 473257	prenticen@angus.gov.uk	Advised that Angus Council have no employment land in the CNPA and they are not looking to change this. 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. There may be opportunity for small employment, one off developments associated with dwellings.
Alison Seggie Economic Development Manger Perth & Kinross Council 3-5 High Street Perth PH1 5JS	01738 477953	alseggie@pkc.gov.uk	Believes there to be localised demand within the areas. She does not know of any development land/business space that Perth and Kinross have within the CNPA boundary. 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.
Robert Armstrong Senior Business Development Executive Economic Development Viewmount Arduthie Road Stonhaven AB39 2DQ	01569 768294	robert.armstrong@aberdeenshire.gov.uk	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. 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. Supply in this area is based on who you know and being aware of sites becoming available. 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.

List of Public Sector Contacts for Interviews

Contact	Telephone Number	E-mail Address	Interview Comments
			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. 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. 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. The Council do not have anything in Dinnet.
Leslie Allan Area Manager – Marr Afford Area Office School Road Afford AB33 8TY	01975 564800	leslie.allan@aberdeenshire.gov.uk	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.
William Gilfillan Corporate Manager Inverness, Nairn, Badenoch & Strathspey The Highland Council Town House Inverness IV1 1JJ	01463 724212	william.gilfillan@highland.gov.uk	No response received.
Sue Palmer Ward Manager - 21 The Highland Council Ruthven Road Kingussie PH21 1EJ	01540 664537	sue.palmer@highland.gov.uk	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.

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Contact	Telephone Number	E-mail Address	Interview Comments
Pierre Masson Business Projects Officer Moray Council Council Offices High Street Elgin IV30 1BX	01343 563485	pierre.masson@moray.gov.uk	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 Glenuruqhart Road Inverness IV3 5NX	01463 702251	matthew.johnstone@highland.gov.uk	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 ft² 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	malcolm.macleod@highland.gov.uk	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 reviewd 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
Debbie MacKay (for the Crown Estate) Associate (Planner) Smiths Gore 12 Bernard Street Edinburgh EH6 6PY	0131 555 1200 M: 07920 810966	debbie.mackay@smithsgore.co.uk	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. 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. They believe there may be some demand for B&B accommodation in the town. The former Richmond & 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.

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Contact	Telephone Number	E-mail Address	Interview Comments
Sandra Middleton / Alan Rankin Cairngorms Business Partnership Inverdruie House Inverdruie Aviemore PH22 1QH	01479 810200 01479 780539	sandra.j.middleton@gmail.com alan.rankin@visitcairngorms.com	Several attempts made but unable to get response from Alan Rankin.
Kevin Bazley Scottish Enterprise Enterprise House 3 Greenmarket Dundee DD1 4QB	01382 305554	kevin.bazley@scotent.co.uk	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	Lorraine.Wildblood@scotent.co.uk	Lorraine asked us to speak to Scottish Enterprise Dundee office as well as Leslie Allan for more detailed feedback.

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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	david.richardson@scdi.org.uk	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	guy.walker@hient.co.uk	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.

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Business Gateway - Contacts

Business Gateway Contact	Telephone Number	E-mail Address	Interview Comments
Maria Peter Business Gateway – Contracts Officer Economic Development The Highland Council Glenurquhart Road Inverness IV3 5NX	01463 702289	maria.peter@highland.gov.uk	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.
Business Gateway – Moray Craig Robertson – Gateway Manager 17 High Street Elgin Moray IV30 1EQ	01343 563634	craig.robertson@highland-opportunity.com	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. Craig recommended that the most appropriate person to contact is Lloyd Cornfield.
Business Gateway – Badenoch & Strathspey Lloyd Cornfield – Gateway Manager Town House The Square Grantown-on-Spey PH26 3HF	07787 283215	lloyd.cornfield@highland-opportunity.com	Telephoned Lloyd Cornfield but he asked for any enquiries to be made by e-mail. We emailed him and his reply stated:- "It is not possible for me to make an informed judgement on this matter. Perhaps Highlands & Islands Enterprise or Highland Council would be better informed re your requirements"
Business Gateway – Deeside (Aberdeen) Andrew Burnett – Gateway Manager Enterprise Business Centre Admiral Court Poynernook Road Aberdeen AB11 5QX	01224 289725	andrew.burnett@enetrust.com	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.

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	gmacwilliam@edrington.co.uk	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

SUMMARY & LOCATION

[illegible]

DESIGN PROCESS

[illegible]

DESIGN

[illegible]

PHASING IN GENERAL

[illegible]

PERIOD

[illegible]

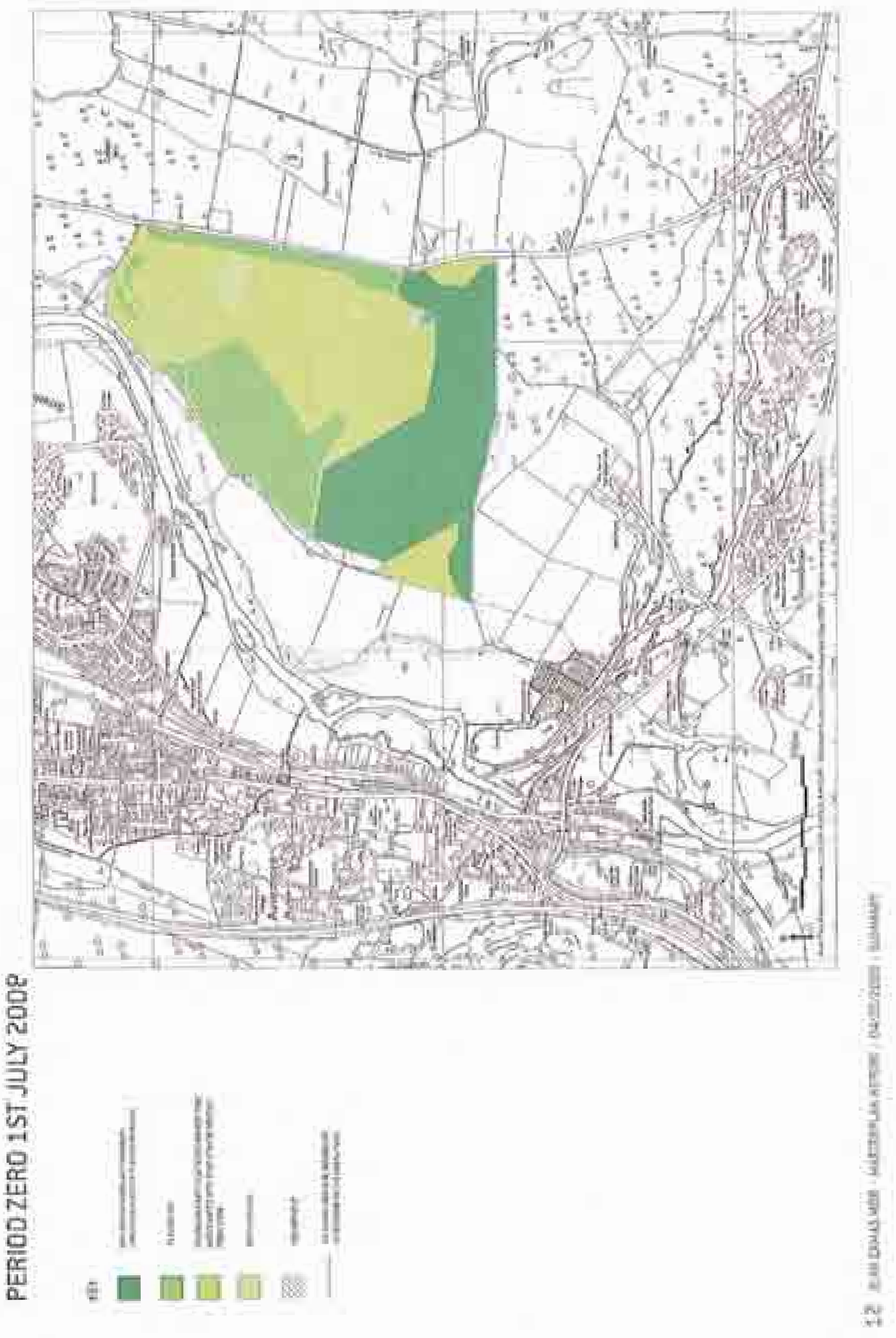
PERIOD ... TO 2011

[illegible]

PERIOD ... TO 2016

[illegible]

PERIOD ... TO 2019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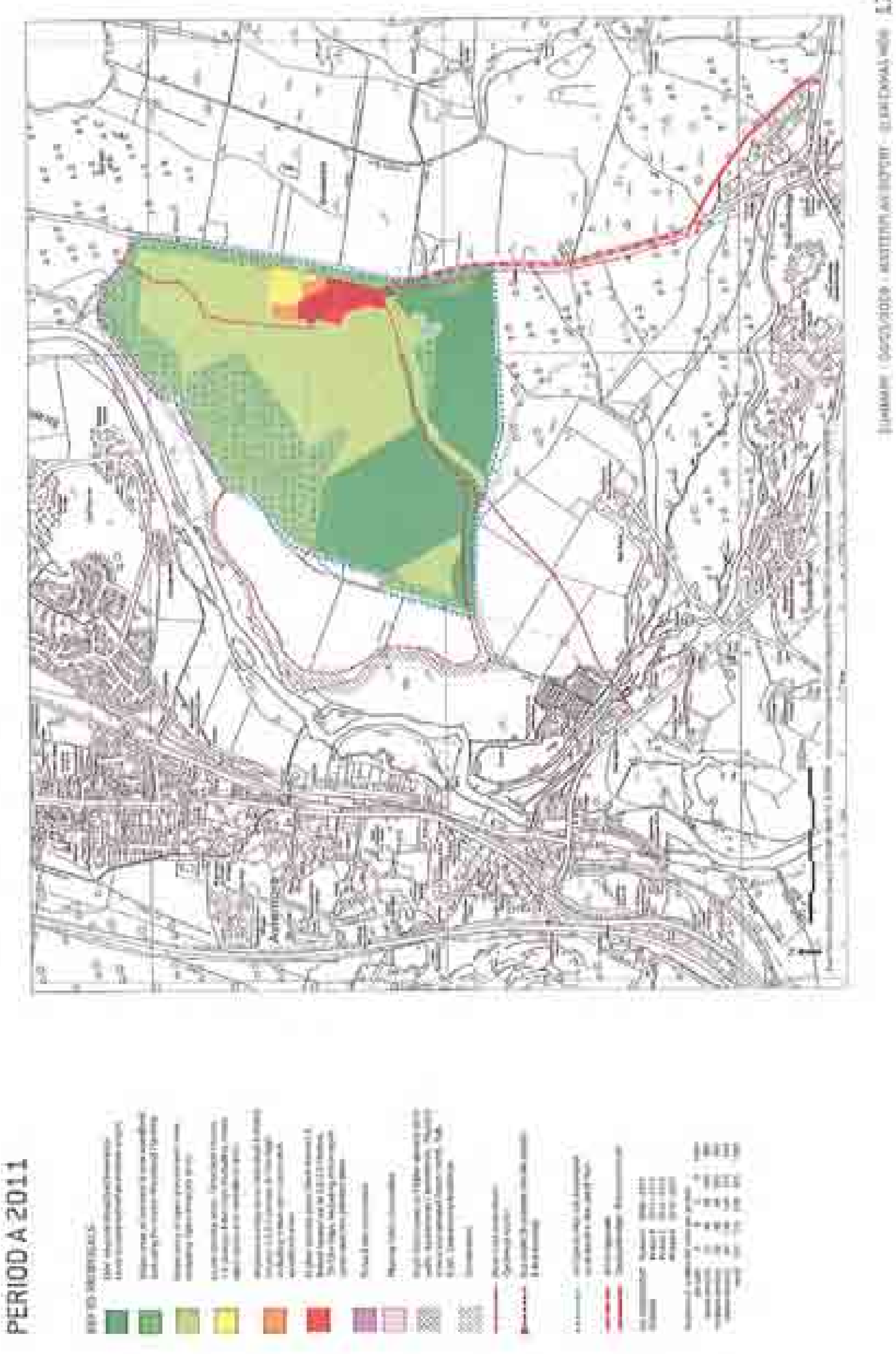
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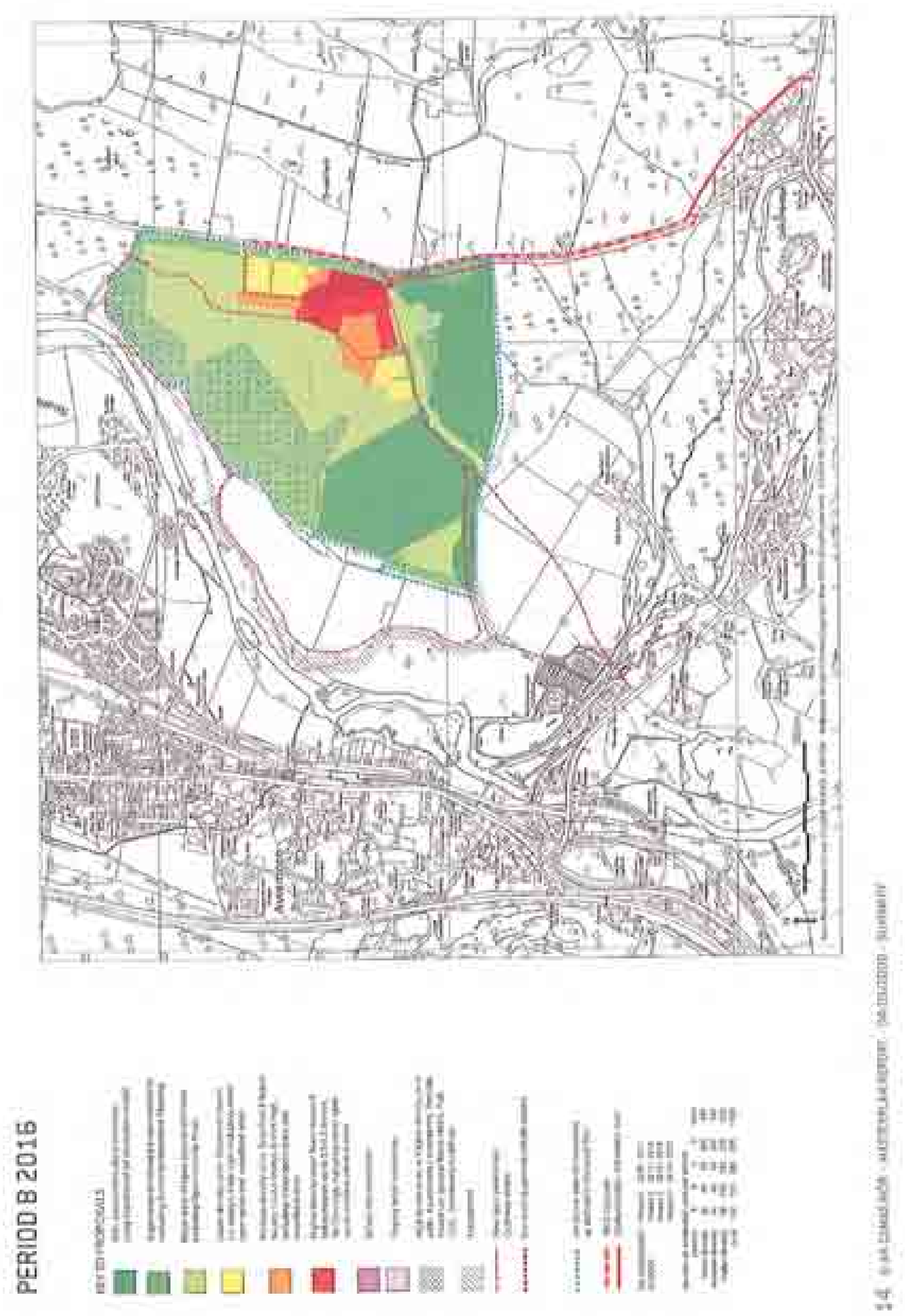
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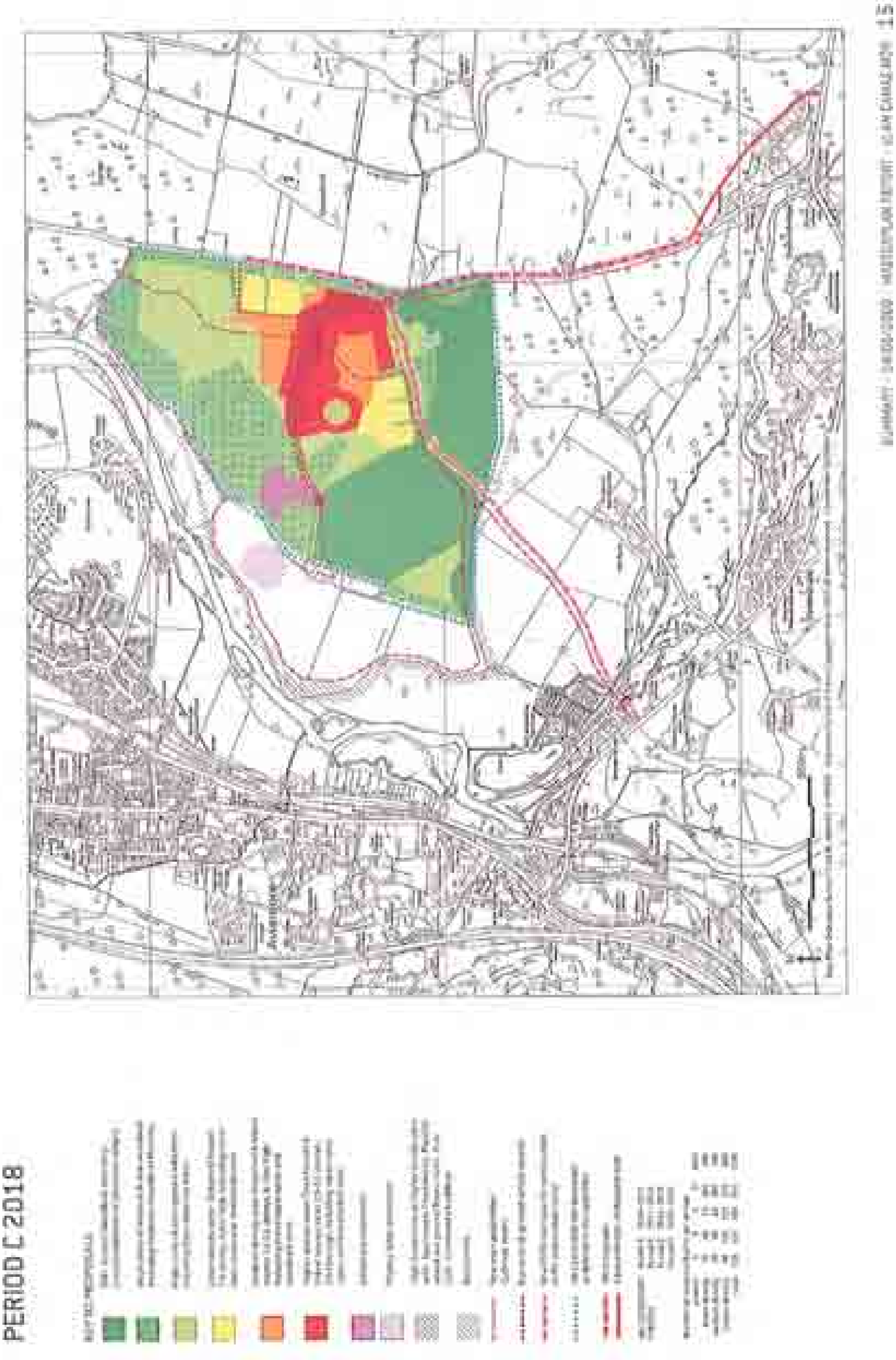
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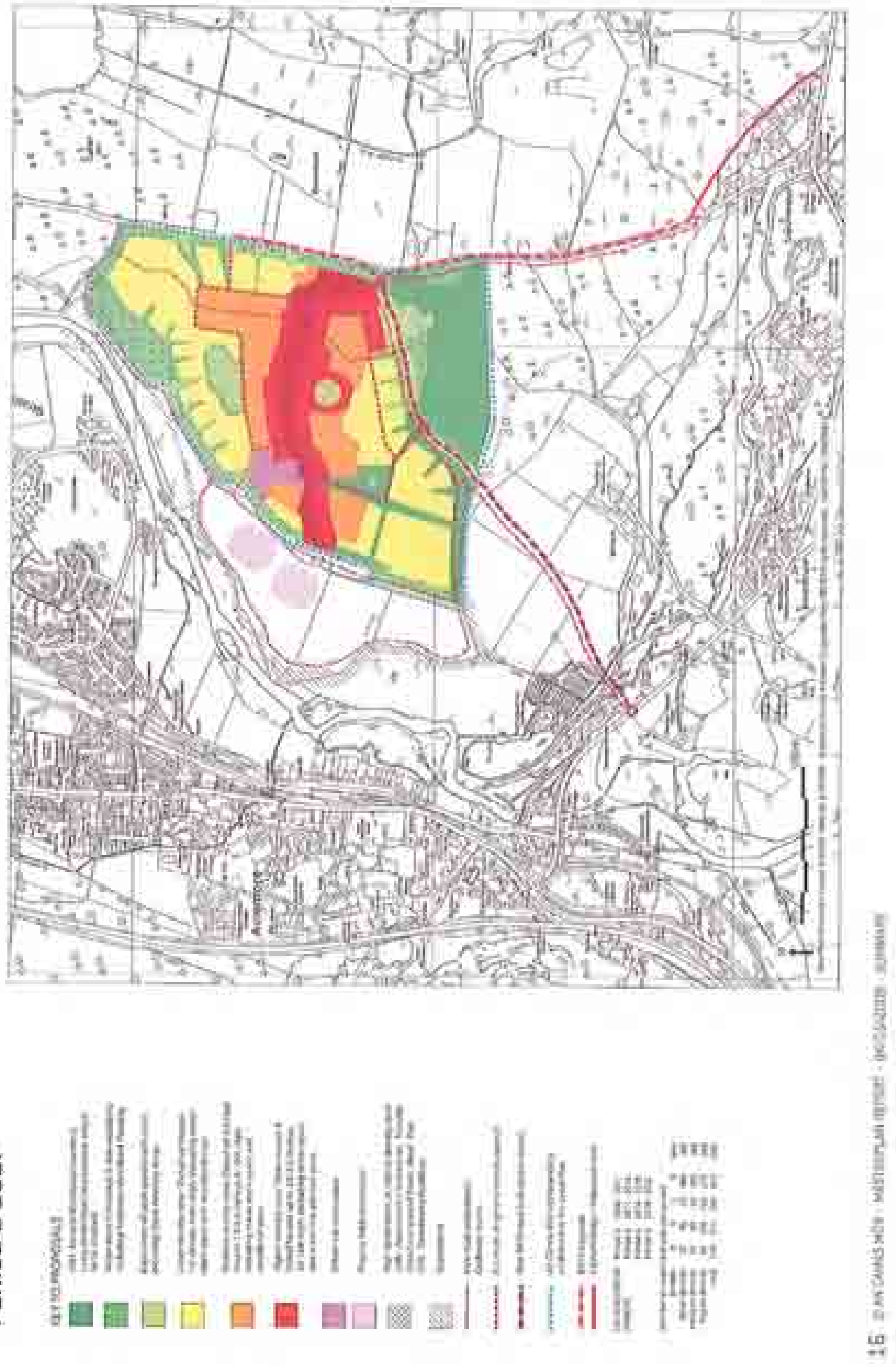
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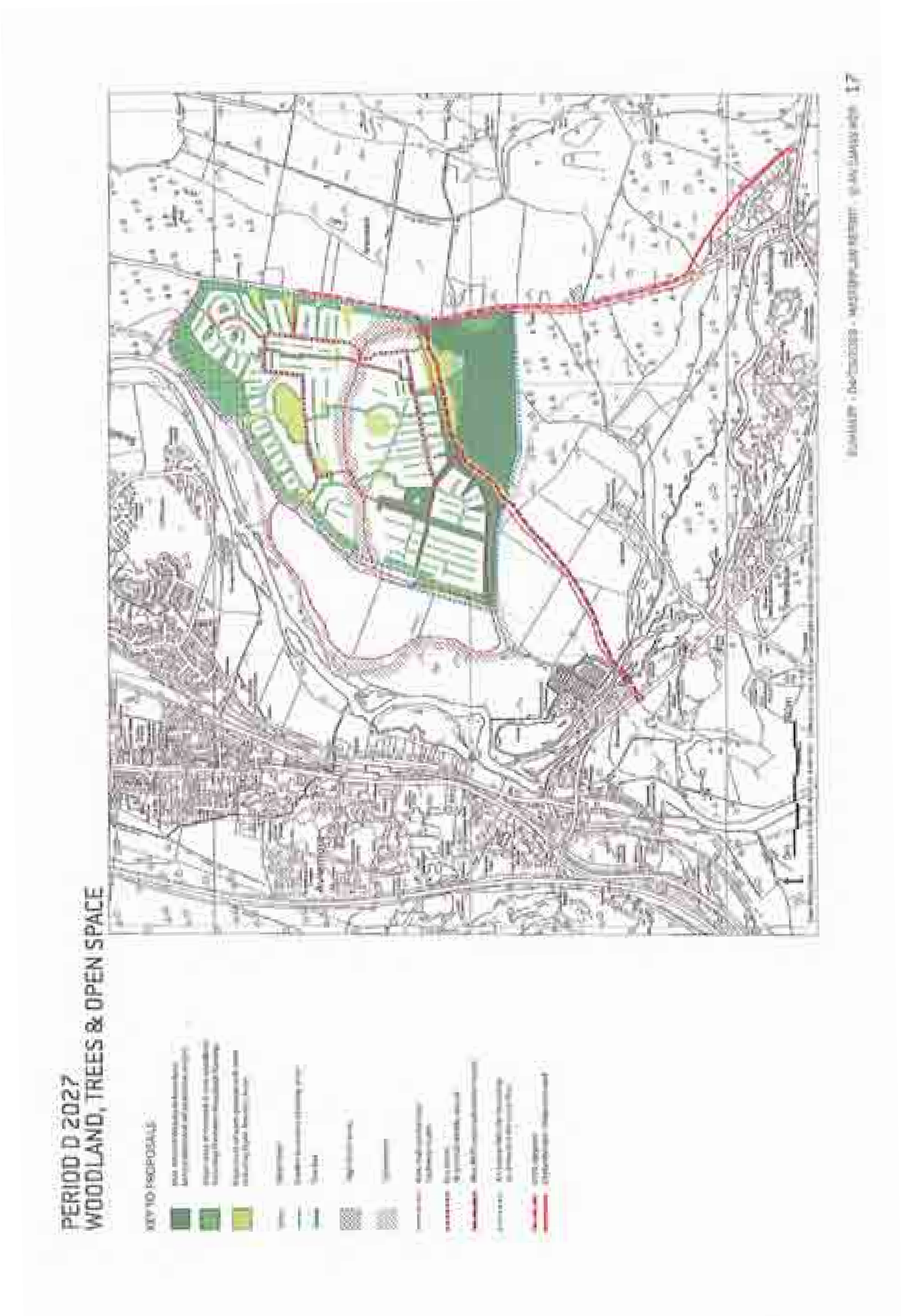

PERIOD D 2027
WOODLAND, TREES & OPEN SPACE
KEY TO PROPOSALS
17

APPENDIX 4.0

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

LOCAL PLAN COMMENTARY **Appendix 4.0**

AVIEMORE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
AV/ED1 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.	12.87	1.02	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 ft² to 3,000 ft². They have no intentions of building these speculatively at the current time.
AV/ED2 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.	4.64	3.11	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.
AV/ED3 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.	54.79	4.11	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 m² or thereby.
AV/ED4 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.	2.46	0	We are not aware of any opportunities to develop land or property within this estate. It would appear to be fully utilised.

LOCAL PLAN COMMENTARY Appendix 4.0

AVIEMORE – FURTHER COMMERCIAL PROPERTY AVAILABLE

Property	Estimated Size	Comments
Former Petrol Filling Station Southern End of Aviemore	0.2 acres	Has been acquired by Inverburn Homes. This would appear to be capable of commercial development.
Aviemore Shopping Centre	From 269 ft²	There are office suites currently available from 269 ft².
Aviemore Village Hall Grampian Road, Aviemore	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.
Development Site Dalfaber Industrial Estate Aviemore	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.
Speyside Business Centre Dalfaber Industrial Estate Aviemore	Office Suite	There is an office suite available to lease within this small business centre.
Former Clockwork Removals Storage Warehouse Dalfaber Industrial Estate Aviemore	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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

BALLATER

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
BL/ED1 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.
BL/ED2 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.
BL/ED3 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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

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 Tulliemet Limited for Atholl Estates. They have developed 8 x 500 ft² units and 6 x 1,500 ft² units. They are fully let at rents ranging from £4.20 to £4.75 per ft². 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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

BOAT OF GARTEN

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
BG/ED1 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.	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.
BG/ED2 The existing caravan and camping site is protected from adverse development.	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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

BRAEMAR

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
BM/ED1 The site of the ambulance station may provide opportunity for small scale economic development particularly where this supports the economic growth of the community.	0.15	0.725	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.
BM/ED2 The new square is a key facility within the centre of the village and has capacity to support additional retail and business units.	0.25	0	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.
BM/ED3 This is the existing Caravan Park.	11.55	0	This site is fully utilised.

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

LOCAL PLAN COMMENTARY **Appendix 4.0**

CARRBRIDGE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
C/ED1 The existing vacant business and industrial sites south west of the A9 are identified for business uses.	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.
C/ED2 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.	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 ft²	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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

CROMDALE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
CD/ED1 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.	0.65	0	This site is being used by Simpson Safety Fencing and is already in business use. There is no opportunity for further development.

DALWHINNE

Local Plan Commentary	Estimated Total Site Size (Acres	Estimated Available Land (Acres)	Comments
DW/ED1 The site provides an important contribution to the local economic position and should be retained.	0.78	0	This is the existing Petrol Filling Station which has been refurbished in recent years. There is ample land around this for further commercial development.
DW/ED2 The Lochailort Hotel provides an important tourist and community opportunity and appropriate proposals to enhance this will be supported.	1.7	0.39	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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

GRANTOWN-ON-SPEY

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
GS/ED1 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.
GS/ED2 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 ft² to 2,000 ft². 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 ft²	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 ft² units.
5 The Square, Grantown-on-Spey	1,173 ft²	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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

KINCRAIG

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
KC/ED1 The site of the Baldow Smiddy and land to the rear provide some opportunity for growth and economic development in the settlement.	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 ft² - 5,000 ft² 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
KG/ED1 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.	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.
KG/ED2 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.	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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

NETHYBRIDGE

Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
NB/ED1 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.	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
NM/ED1 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.	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.
NM/ED2 The existing industrial estate will be protected and developments which consolidate the economic provision of this site will be supported.	7.36	0	We estimate this estate provides 14 x 1,000 ft^2 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.
NM/ED3 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.	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.

LOCAL PLAN COMMENTARY **Appendix 4.0**

TOMINTOUL

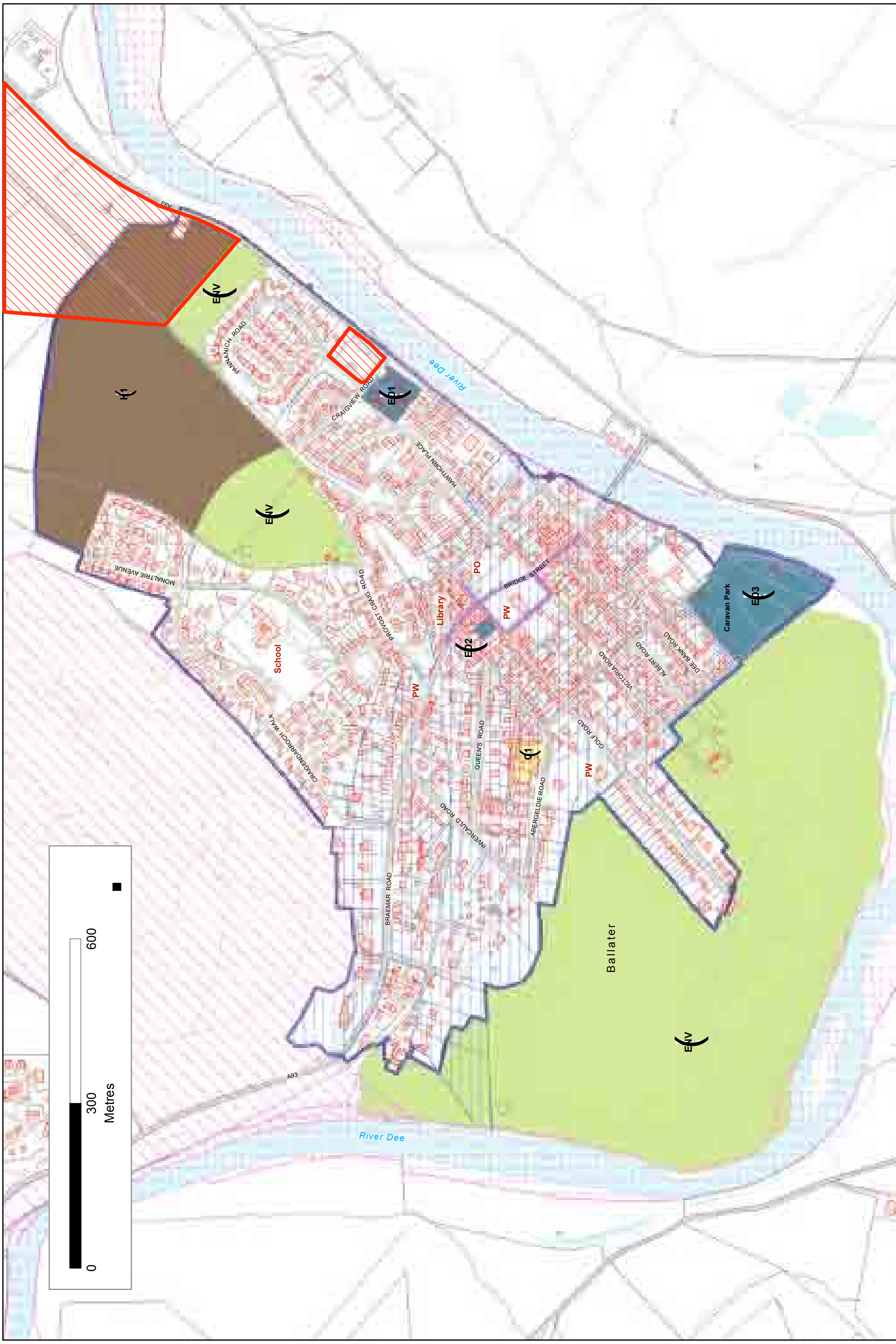
Local Plan Commentary	Estimated Total Site Size (Acres)	Estimated Available Land (Acres)	Comments
ED/1	2.69	0	This site has potential to be developed as a camping site or tourist facility with the existing tree planting retained to ensure adequate screening.
ED2 & ED3 This land is partially developed 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.	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.
ED4 This site is in economic use.	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 ft²	0	Currently vacant. This could potentially be converted back into commercial use.

APPENDIX 5.0

Plans Showing Potential Sites that could be Zoned


H1
ENV
ENV
ENV
ED1
ED2
ED3
River Dee
River Dee
PANNANICH ROAD
CRAIGVIEW ROAD
HAWTHORN PLACE
MONALTRIE AVENUE
PROVOST CRAIG ROAD
BRIDGE STREET
PO
PW
PW
PW
Library
School
Caravan Park
CRAIGENDARROCH WALK
QUEEN'S ROAD
GOLF ROAD
VICTORIA ROAD
ALBERT ROAD
DEE BANK ROAD
INVERCAULD ROAD
ABERGELDIE ROAD
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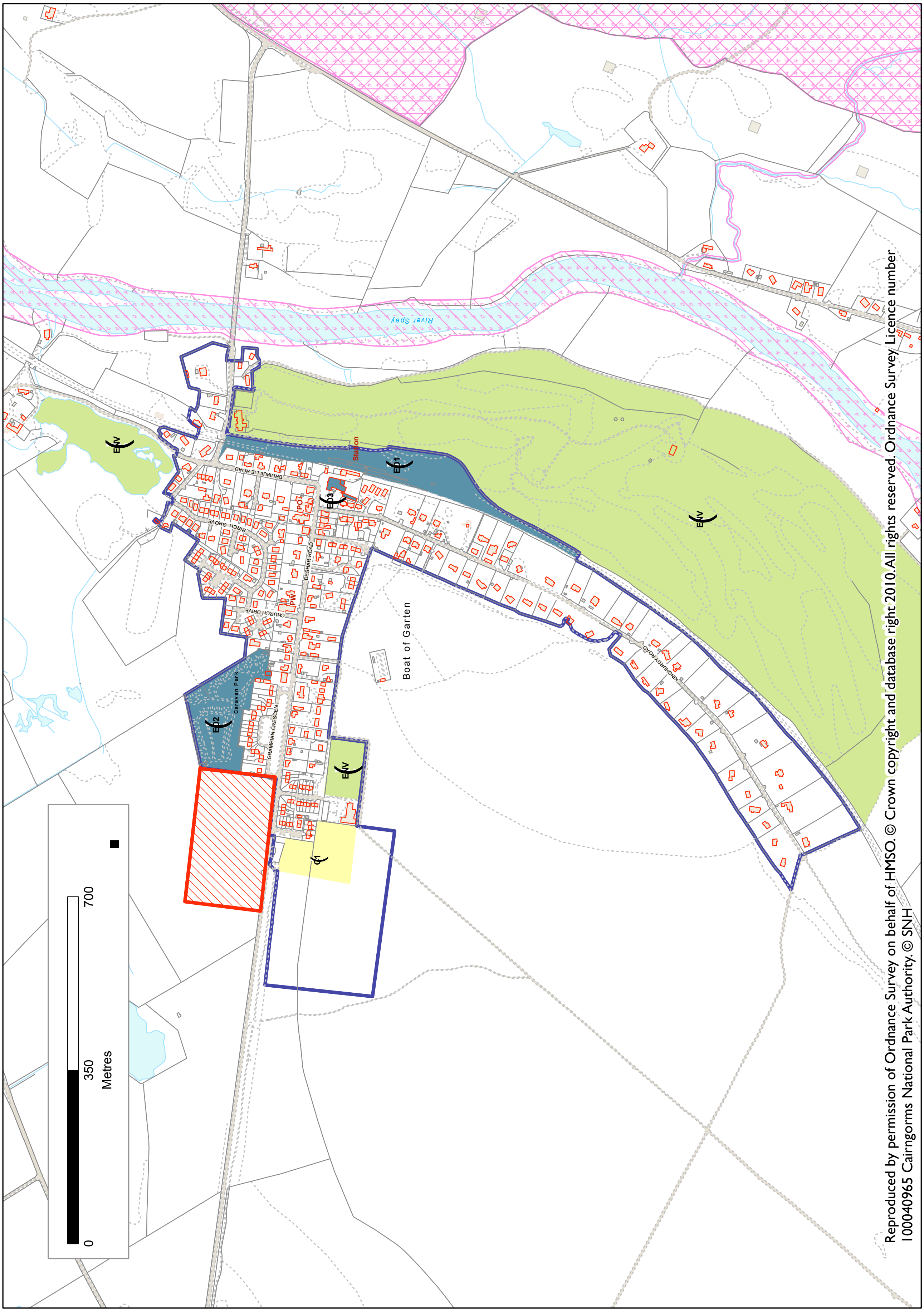
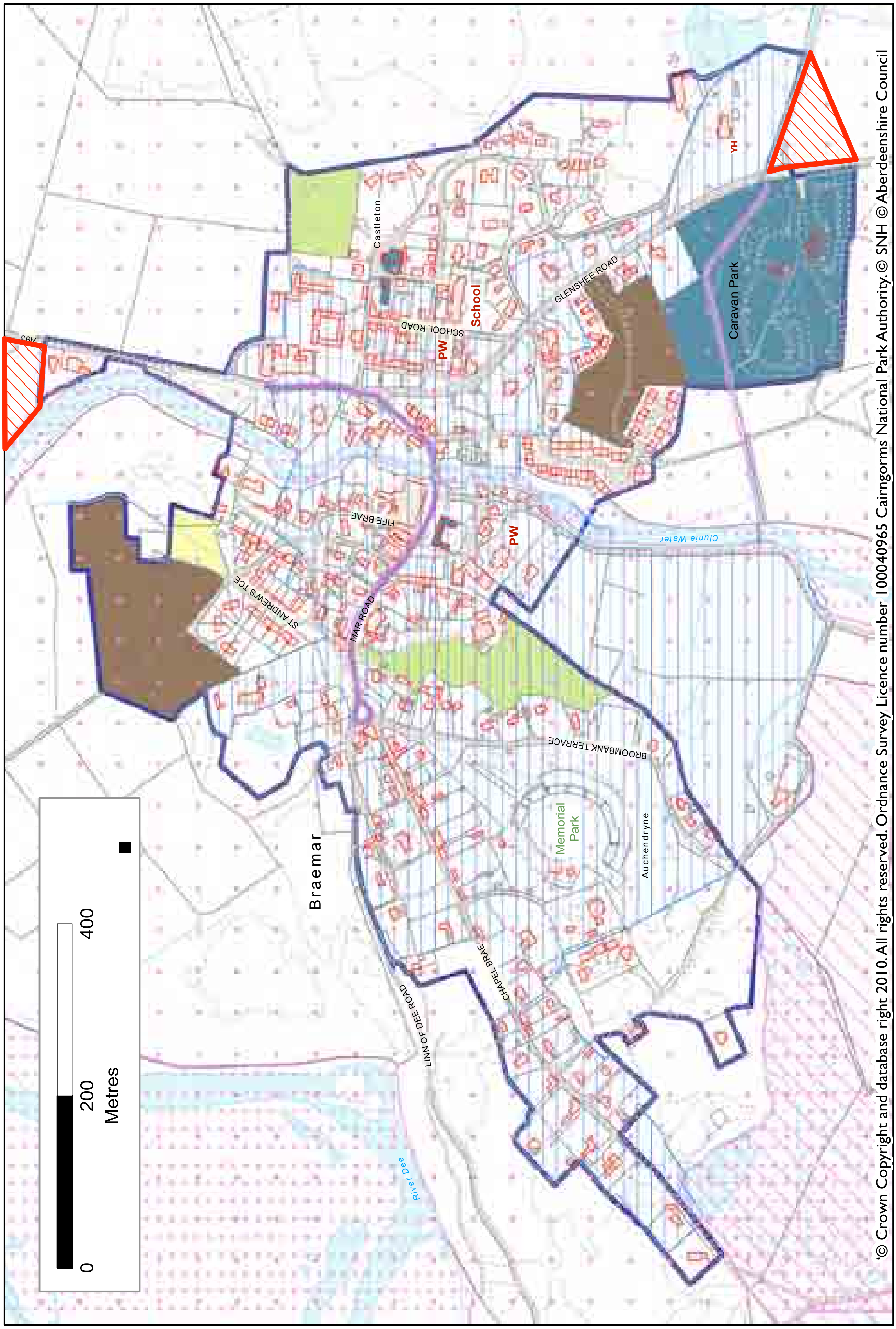
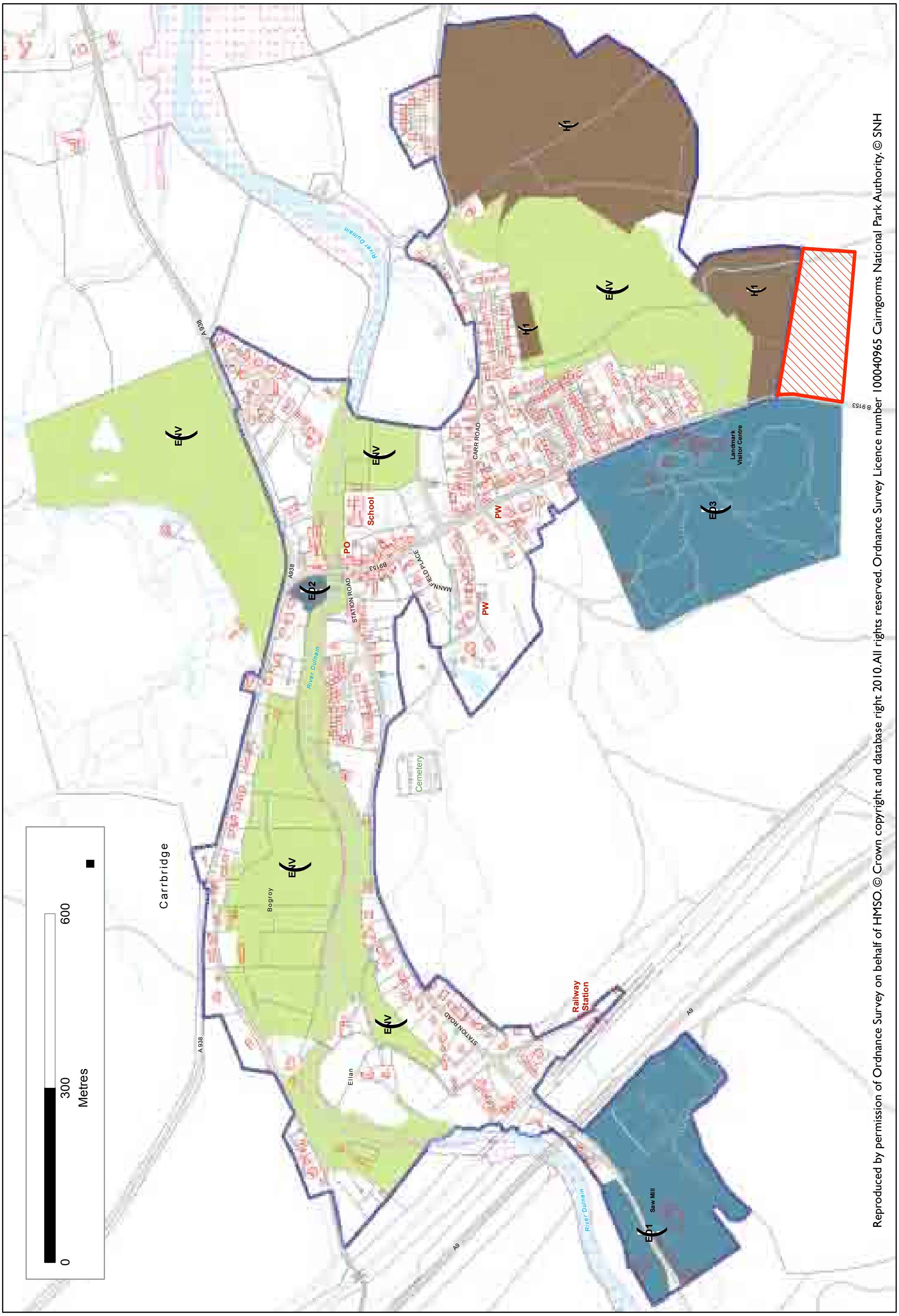
Ballater
0
300
600
Metres

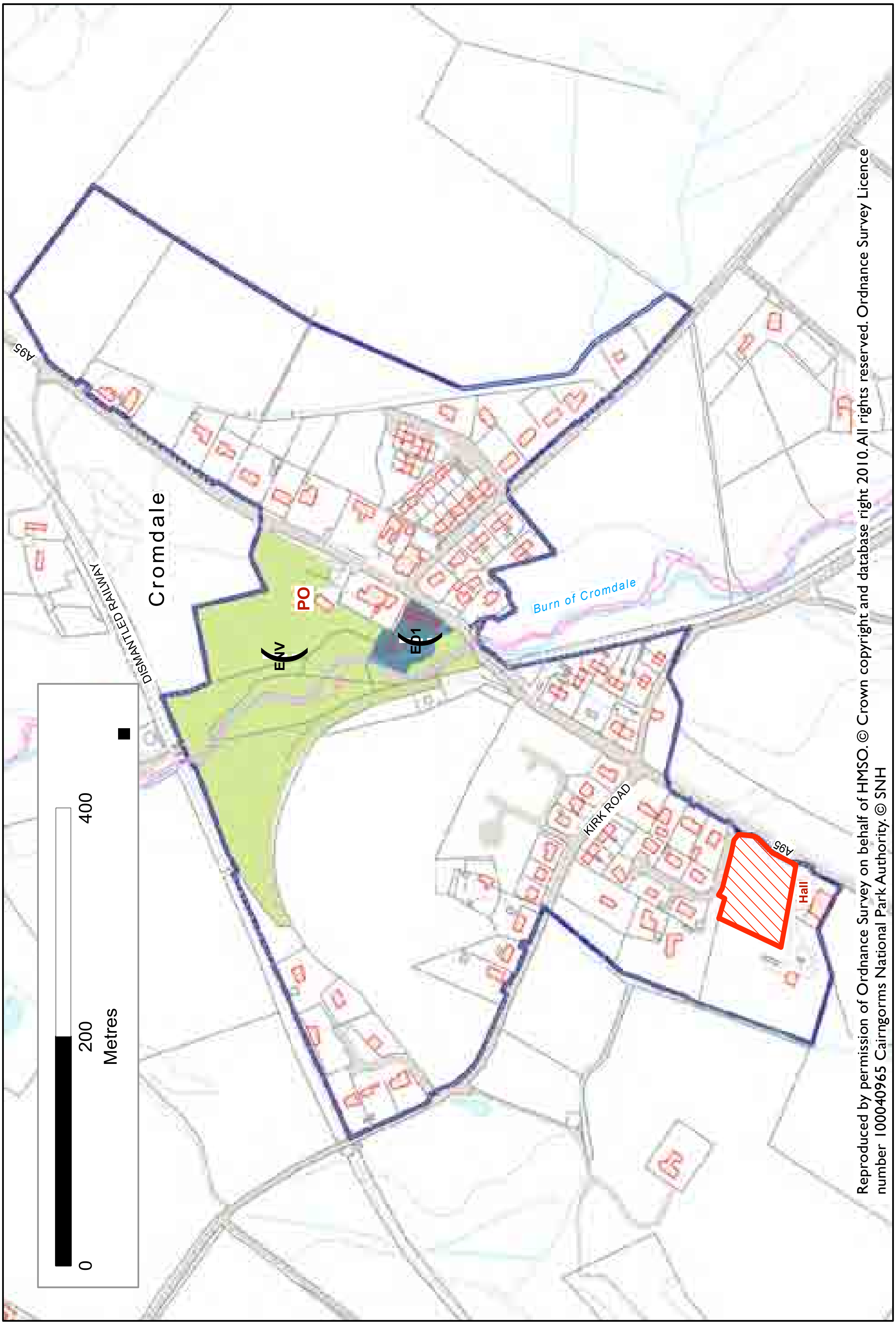

River Spey
ENV
ED1
ED2
ED3
H1
Station
Caravan Park
DRUMUILLIE ROAD
BIRCH GROVE
DESHAR ROAD
CHURCH DRIVE
GRAMPIAN CRESCENT
KINCHURDY ROAD
PO
PW
Boat of Garten
0
350
700
Metres



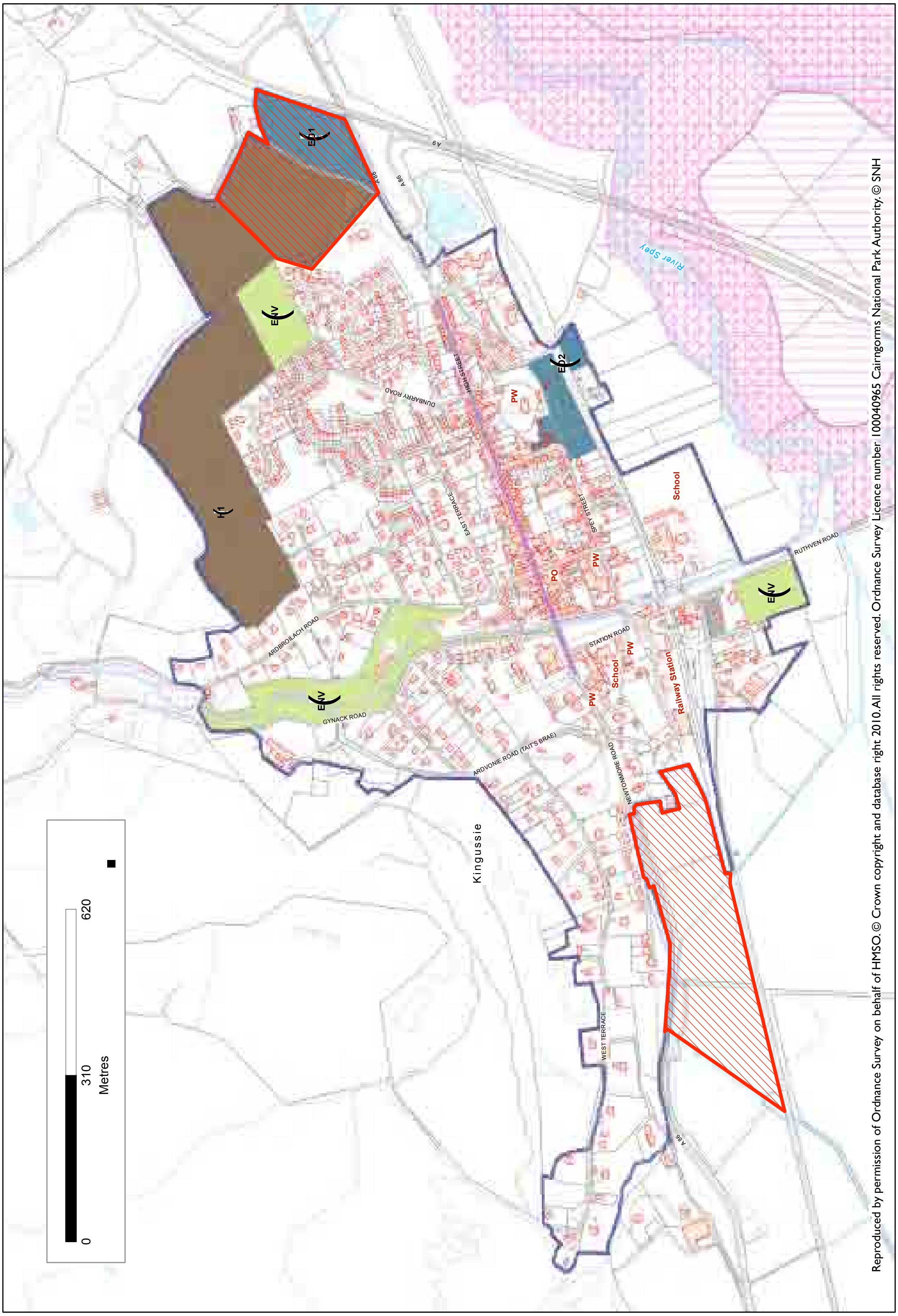
Braemar
Castleton
School
SCHOOL ROAD
PW
PW
GLENSHEE ROAD
Caravan Park
YH
FIFE BRAE
MAR ROAD
ST ANDREWS TCE
Clunie Water
BROOMBANK TERRACE
Memorial Park
Auchendryne
CHAPEL BRAE
LINN OF DEE ROAD
River Dee
A93
0
200
400
Metres

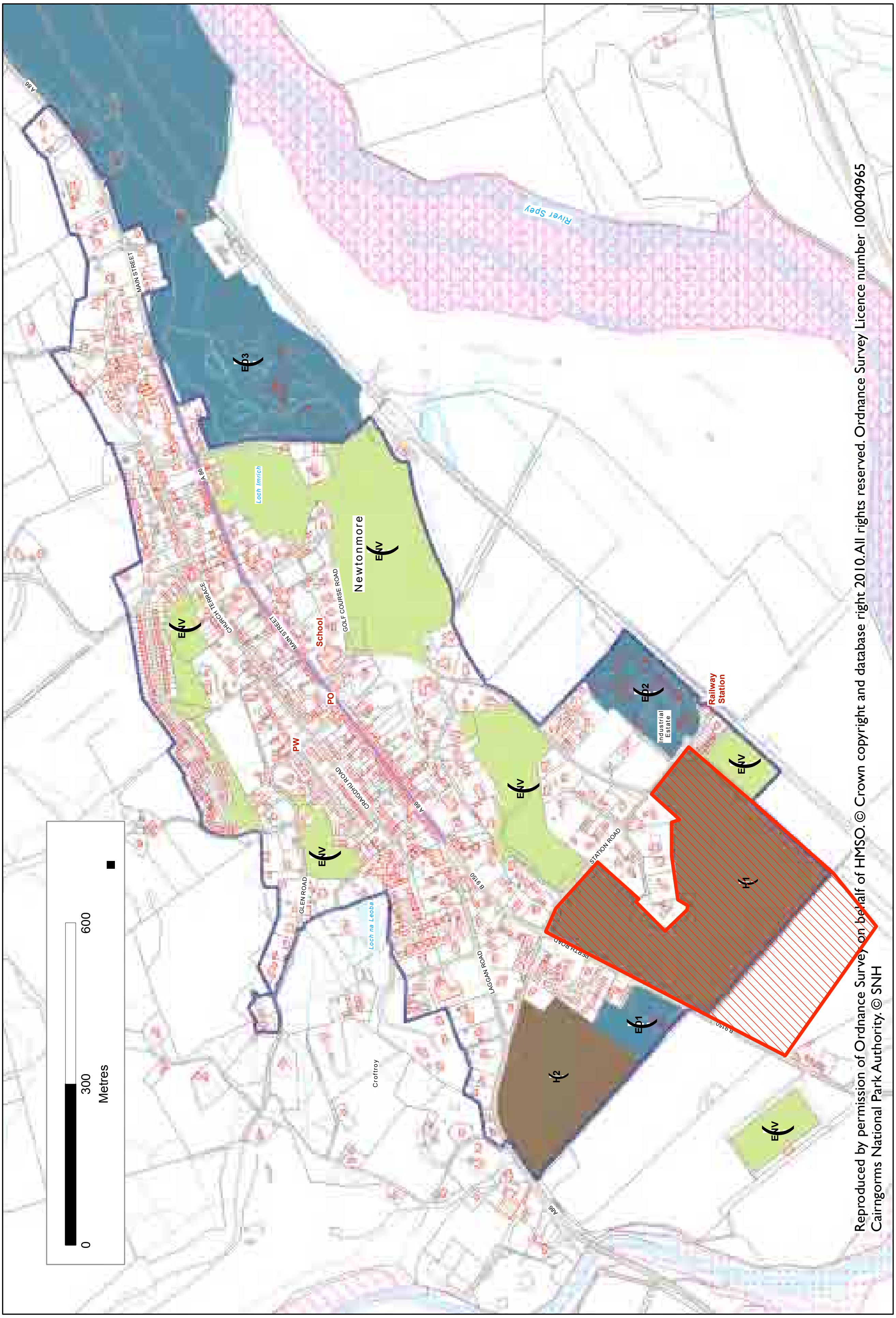


Carrbridge
0
300
600
Metres
H1
H1
H1
ENV
ENV
ENV
ENV
ENV
ED1
ED2
ED3
School
PO
PW
PW
Railway Station
Cemetery
Bogroy
Ellan
Landmark Visitor Centre
Saw Mill
River Dulnain
River Dulnain
River Dulnain
A938
A938
A938
B9153
B9153
A9
A9
STATION ROAD
STATION ROAD
CARR ROAD
MANNFIELD PLACE


Cromdale
DISMANTLED RAILWAY
A95
PO
ENV
ED1
Burn of Cromdale
KIRK ROAD
A95
Hall
0
200
400
Metres


0
300
600
Metres
Caochan an Ruigh
ED3
Distillery
Reservoir (covered)
H1
Dalwhinnie
A 889
Railway
Station
H2
BEN ALDER ROAD
School
River Truim
ENV
GENERAL WADE'S MILITARY ROAD
ED2
Aqueduct
PO
ED1
H3
Dam
Loch Ericht
A 889


ED1
ED2
ENV
ENV
ENV
ENV
H1
A9
A86
River Spey
HIGH STREET
DUNBARRY ROAD
EAST TERRACE
SPEY STREET
RUTHVEN ROAD
STATION ROAD
ARDBROILACH ROAD
GYNACK ROAD
ARDVONIE ROAD (TAIT'S BRAE)
NEWTONMORE ROAD
WEST TERRACE
PW
PW
PW
PW
PO
School
School
Railway Station
Kingussie
0
310
620
Metres


Newtonmore
River Spey
Loch Imrich
Loch na Leoba
MAIN STREET
CHURCH TERRACE
GOLF COURSE ROAD
GLEN ROAD
CRAIGDHU ROAD
STATION ROAD
PERTH ROAD
LAGGAN ROAD
A 86
B 9150
School
PO
PW
Railway Station
Industrial Estate
Croftroy
ED1
ED2
ED3
H1
H2
ENV
0
300
600
Metres

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Cairngorms National Park Authority
14 The Square
Grantown-on-Spey
Moray
PH26 3HG
(t) 01479 873535
(f) 01479 873527
enquiries@cairngorms.co.uk

Planning and Development Management
Albert Memorial Hall
Station Square
Ballater, Aberdeenshire
AB35 5QB
(t) 013397 53601
(f) 013397 55334
localplan@cairngorms.co.uk

www.cairngorms.co.uk

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