



the moray council



HOUSING, INDUSTRIAL & OPPORTUNITY SITES SCHEDULE

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PREFACE

This schedule of housing, industrial and opportunity sites is produced by The Moray Council.

WHILE EVERY EFFORT HAS BEEN MADE TO ENSURE THAT THE INFORMATION IN THE BOOKLET IS ACCURATE AND COMPLETE, THE ATTENTION OF THE USER IS DRAWN TO THE FOLLOWING POINTS:

- The Introduction contains advice on the interpretation and analysis of the statistics and this should be carefully studied, to avoid possible misrepresentation.
- The information on housing is presented comprehensively for sites of 5 or more houses; only aggregated annual totals of past completions are given for smaller sites and individual houses.
- Development Plans, Capital Programmes and commitment levels are continually being updated and should be checked with the appropriate source to obtain the current position.

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(Parish Information)

SETTLEMENT MAP



HOUSING

Introduction

Housing Land Audit 2008

1. Purpose of Audit

- 1.1 This audit provides details of Moray's Housing Land Supply as at January 2008. The report explains the different classifications of land within the overall supply and compares supply with the housing land requirements identified in the Moray Structure Plan 2007.
- 1.2 The audit also examines past and future predicted trends in housing land supply and identifies any action required to address issues arising.
- 1.3 The audit has been produced using the guidance set out in PAN38, SPP3 and the Homes for Scotland Advice Note on Housing Land Audits.
- 1.4 SPP3 has recently been reviewed and broadly requires local authorities to ensure;-
 - that Local Plans allocate land on a range of sites to meet the housing land requirement up to year 10, providing appropriate effective sites in the initial phase to accommodate the requirement for at least 5 years from the date of adoption, and further sites capable of development by the end of year 10.
 - Where appropriate, Local Plans should indicate the long-term reservation of land for housing in line with the settlement strategy.
 - The effectiveness and programming of sites should be monitored through the housing land audit with the aim of maintaining sufficient effective land for at least the following 5 years at all times.
 - Development plans should be capable of responding to changes as necessary. They should identify triggers for the release of future phases of effective sites, where the annual audit indicates that availability of housing land and/ or completions is not keeping pace with identified requirements and a five year land supply cannot be maintained.
- 1.5 This audit and future audits will set out the triggers and consider the need for the release of LONG term sites identified in the Local Plan.

2 Preparation of Audit

- 2.1 The draft audit has been prepared by the Council using details of all development sites included within the Moray Local Plan 2000 and the Emerging Moray Local Plan 2008. In addition to these, further details have been added through the planning application system to identify windfall sites.
- 2.2 Completions have been monitored through contact with local housebuilders and site

visits by planning officers. Constraints have been identified through the Local Plan and in discussion with developers and statutory consultees.

- 2.3 Details of each site with a capacity of 5 or more houses are recorded, along with recent rates of housing completions and an assessment of likely potential future development rates. This assessment takes into account factors such as planning status, infrastructure constraints, building capacity, market demand, housing and financial plans.
- 2.4 The draft audit has been discussed with Homes for Scotland, Communities Scotland, Scottish Water, local housebuilders and other interested organisations.

3 Land Supply Definitions

- 3.1 There are three categories of land identified within the audit.

3.2 Established Housing Land Supply

- 3.2.1 This is the total housing land supply, calculated by adding the effective and constrained land together. This includes sites under construction, sites with planning consent and other sites agreed as having potential for development.

3.3 Effective Housing Land Supply

- 3.3.1 This is the housing land supply that is expected to be free from development constraints and available for construction of housing. Most sites with planning consent for residential development and/ or identified within the Emerging Moray Local Plan 2008 fall into this category where the site is free of the following types of constraint;-

- ownership
- physical
- contamination
- deficit funding
- marketability
- infrastructure
- land

3.4 Constrained Housing Land Supply

- 3.4.1 This consists of sites, which at the time of the audit were not assessed as being effective. The principal reason for the site being constrained is identified in the schedules. The identified constraint is considered to be significant and may not be resolved within the "effective" land supply period. This also includes "LONG" designations, which are constrained under the terms of Policy H2 (see section 12).

4. Established Land Supply

4.1 The established land supply for the Moray Structure and Local Plan area is shown in Table 1 below.

Table 1: Established Land Supply

	2004	2005	2006	2007	2008
Moray	2555	2290	2077	7533	7173

4.2 The established land supply in 2008 has a capacity of 7173. This reflects the majority of new sites in the Emerging Moray Local Plan 2008 becoming available for development. This includes 2625 units identified as LONG in the Emerging Plan.

5. Constrained Land Supply

5.1 The constrained housing land supply is shown in Table 2.

Table 2: Constrained Land Supply 2008

	2004	2005	2006	2007	2008
Moray	385	373	372	6320	4394

5.2 A total of 4394 units are constrained in 2008. This is significantly less than 2007 as the 2007 figure identified all new sites in the Emerging Moray Local Plan 2008 as constrained. Table 3 below summarises the constrained sites and the nature of the constraint. The table shows that the majority of these sites are constrained through designation as "LONG" term development sites. These sites can only be considered effective when the triggers of Policy H2 are met and the site is free of the constraints listed in paragraph 3.3.1. A number of sites are also constrained through Flooding, impact on Flood Alleviation schemes and Drainage issues.

5.3 Sites with a capacity of 1162 are constrained by programming and may become effective depending upon completion rates, demand etc.

5.4 Analysis of constraints

Table 3: Analysis of Constraints

Constraint	No. of sites	No. of units	% of constrained units
Road/ Access	4	85	1.93
LONG	13	2625	59.74
Phasing	3	110	2.50
Marketability	6	70	1.59
Flooding/ Drainage	8	309	7.03
Programming	29	1162	26.44
Ownership	1	14	0.32
Lapsed Consents	3	19	0.43
Totals	67	4394	100

6. Effective Land Supply

6.1 The five year effective land supply for the Moray Development Plan area is shown in table 4.

Table 4: Effective Housing Land Supply

	2004	2005	2006	2007	2008
Moray	2170	1917	1705	947	2779

6.2 The effective housing land supply has a capacity of 2779 units. In 2007 the effective land supply figure reflected the development of most of the sites identified in the Moray Local Plan 2000. However, this figure has increased considerably with many of the sites identified in the Emerging Moray Local Plan as effective. In addition to the effective land supply there are an additional 1162 units which are constrained only by programming and were previously classed as "potentially effective".

7. Rest of Moray

7.1 In the Rest of Moray there are a number of consents granted for sites with a capacity of 5 units and over, which make a significant contribution to the housing land supply. New consents and completions are monitored and added to the schedules as part of the annual monitoring. The contribution from small sites and role of rural community sites will be discussed with Homes for Scotland prior to the 2009 audit.

8. Windfall Sites

The contribution of windfall sites to the number of units completed and projected to be complete will be monitored. Windfall completions in 2007 represented 22.2% of all completions.

Table 5 below identifies the current and projected windfall completions.

Windfall Completions	Projected Windfall	Projected Windfall	Projected Windfall	Projected Windfall	Projected Windfall
2007	2008	2009	2010	2011	2012
57	160	71	50	15	13

9. Completions

Table 6: Completions

	2003	2004	2005	2006	2007
Moray	403	417	441	349	256

Table 7: Projected Completions based on land availability

	2008	2009	2010	2011	2012
Moray	339	524	756	624	536

9.1 Analysis of trends

Completions have decreased as sites in the Moray Local Plan 2000 have been completed and new sites have been delayed in becoming effective. Completions are likely to remain relatively low in the first years of operating the emerging Moray Local Plan 2008, increasing significantly in 2010 and 2011. Future audits will include an analysis of projected completions against actual completions.

9.2 Table 7 projects possible completions based on land availability and does not take account of the current economic climate affecting the housebuilding industry.

10. Housing Requirement and Effective Housing Land Supply

10.1 The Moray Structure Plan 2007 sets out the strategic housing land requirement for the period 2005-2017, as shown in table 8 below.

Table 8: Strategic Housing Land Requirement

Projected Household Change 2005-2017	3043
Add 50% flexibility	1522
Total housing requirement	4565

10.2 The residual housing land requirement, in terms of meeting the Structure Plan, is therefore 4565-completions in 2005 (441), 2006 (349) and 2007 (263)=3512.

10.3 Dividing the Structure Plan requirement by 12 gives an annual requirement of 380, which equates to a five year requirement of 1900.

Using the annual requirement calculation;

Table 9: Land Supply/ No. of year supply

	Housing Land Supply	No. of years supply
Established	7173	18.8
Effective	2779	7.3
Constrained	4394	11.5

This analysis can be broken down further for a more detailed comparison against Schedule 2 of the Moray Structure Plan 2007.

Settlement	Housing Land Requirement 2005-2017	Completions 2005-2007	5 year requirement	5 year effective supply
Elgin	1663	518	693	1016
Forres	753	116	313	508
Buckie	499	26	208	231
Lossiemouth	321	42	134	193
Keith	314	12	130	118
Remainder of Moray	1019	340	424	713
Total	4569	1054	1902	2779

11 Summary Analysis

10.1 The audit totals of effective, constrained and established housing land supply are set out in Table 10 below.

Table 10: Moray Housing Land Supply

	2003	2004	2005	2006	2007	2008
Effective	2497	2170	1917	1705	947	2779
Constrained	446	385	373	372	6320	4394
Established	2943	2555	2290	2077	7267	7173

12 Long term housing designations

12.1 Policy H2: Indicative Long Term Housing Allocations

POLICY H2: INDICATIVE LONG TERM HOUSING ALLOCATIONS

Indicative long-term housing allocations are identified in the settlement plans for Elgin, Forres, Buckie, Keith, Fochabers, Cullen, Rothes, Lhanbryde, Aberlour and Urquhart. They are embargoed from development during the period of the Local Plan unless the Local Planning Authority is convinced that their early release is justified.

The Council will evaluate the need for the early release of long term housing land through the annual Housing Land Audit and Monitoring Report. The triggers for the early release will include a shortage of effective housing land, significant changes in development rates, infrastructure provision and structural landscaping provision.

12.2 The triggers and mechanism for releasing LONG term sites are explained below;-

Trigger 1

Where a shortfall in the 5 year effective land supply in the primary or secondary centres is identified in the annual Housing Land Audit. If this scenario arises the Council will consider whether;-

- a. the shortfall is considered to be significant
- b. whether the shortfall is likely to be met through windfall provision based on previous trends
- c. whether constrained sites are likely to become available for development to meet the shortfall and whether sites are constrained only through programming
- d. whether the shortfall compromises the ability to meet the strategic housing land requirements set out in the Structure Plan and Policy H1 of the Emerging Moray Local Plan 2008.

If the shortfall is significant and unlikely to be overcome in the short term then an appropriate release of LONG term land will be recommended to meet the shortfall.

The amount of land to be released will be dependent upon an assessment of what other sites will become effective to ensure a continuous five year effective housing land supply.

A shortfall (under the above terms) of effective housing land in one of the five main towns should be met through a LONG term release in the same town, to ensure conformity with the Structure Plan and Policy H1 of the Local Plan.

Where a decision is made to release LONG term land and there is more than one LONG term site in that settlement, an assessment will be made as to which site is considered the most suitable based on considerations such as infrastructure, landscaping, settlement pattern, effectiveness etc

Trigger 2

Outwith the primary and secondary centres, LONG term sites will only be considered for early release where the residential land designations are clearly demonstrated to be constrained for the entire plan period and the plan will therefore fail to achieve the housing land requirements set out under Policy H1.

Trigger 3

Where the release of LONG term sites is required to deliver stated key objectives of the Council and its Community Planning partners.

Clear evidence will be required to support any release.

A summary assessment of the triggers against each LONG term site is set out in Table 11 below.

Table: 11 Assessment of LONG term sites

Settlement	Site	Comment/ Triggers	Recommendation
Aberlour	Braes of Allachie	Effective land supply available	No need to release
Buckie	Barhill Road West	Part of site has already been agreed for release to replace "lost" units at Portessie station site as recommended by Local Plan Inquiry Reporter.	No need for further release.
Cullen	High Street (Phase2)	Effective land supply available.	No need to release.
Elgin	Seafield Road	Effective land supply available	No need to release.
Fochabers	Findrassie	Effective land supply available	No need to release.
Forres	N Brooklands Phase 2	Effective land supply available.	No need to release.
	Dallas Dhu	Effective land supply available	No need to release.
	Lochyhill	Part of site has already been agreed for release to replace "lost" units at Drumduan and Pilmuir Road West.	No need for further release.
Keith	Banff Road (south) Edindiach Road (Phase 2)	Effective land supply available. Part of site has already been agreed for release to replace "lost" units at Corsairty.	No need to release. No need for further release.
Lhanbryde	West of St Andrews Rd (phase 2)	Effective land supply available.	No need to release
Roths	Greens of Roths	Effective land supply available.	No need to release.
Urquhart	Meft Road	Site is identified for longer term development in accordance with the recommendations of the Local Plan Inquiry Reporter. This allows Urquhart a period of consolidation following significant growth in recent years.	No need to release.

TOWN	2005	2006	2007	2008	2009	2010	2011	2012	2013+
ABERLOUR	5	3	3		6	16	10		90
ALVES				9					
ARCHIESTOWN	2	1	0	3	2		1	1	8
BUCKIE	11	9	6	45	26	59	58	43	445
BURGHEAD	12	22	18	17	26	34	30	11	8
CRAIGELLACHIE				2	3	3	3	3	10
CULLEN	3	6	3	2	5	5	5	5	60
DALLAS				2		3	2		6
DUFFTOWN	5	9	8	7	17	20	19	11	3
DYKE					6	6			
ELGIN	126	233	151	84	132	250	260	290	1972
FINDHORN	7	4	1		8	13	8	8	8
FINDOCHTY	1				3	3	3	3	43
FOCHABERS	1				25	25			50
FORRES	96	20		85	98	155	90	80	676
HOPEMAN	1								
KEITH	2	10		7	43	35	20	13	487
KINLOSS				3	10	8	5	5	11
LHANBRYDE	69	1	2						
LOSSIEMOUTH	23	19	11	13	27	23	22	37	20
MOSSTODLOCH				5	5	62	54	15	192
NEWMILL					1	5	20		
PORTGORDON		1	3	3	5	2	2	2	8
PORTKNOCKIE					2	2			72
RAFFORD									42
REMAINDER OF MORAY	65	7	46	51	45	21	5		10
ROTHES	4	4			5				59
ROTHIEMAY					4	4	4	4	80
TOMINTOUL	4		1	3	20	2		3	4
URQUHART	3								10
	440	349	256	339	524	756	624	536	4394

INDUSTRIAL SUMMARY

TOWN	2003	2004	2005	2006	2007	2008+
BUCKIE			0.29	0.32	0.6	1.73
ELGIN	0.7					2
FORRES	0.37	0.36		0.76		1
KEITH		0.08			0.2	0.5
LOSSIEMOUTH						
ROTHES						
	1.07	0.44	0.29	1.08	0.8	77.56

The following definitions and classification in the schedules apply:

HOUSING SITES**SITE DETAILS**

Site Ref	Area/Settlement or Parish/Residential/Sequential Reference Number.
Location	Address of Site.
Owner	Current owner of the site.
Developer	Agency responsible for the development and management of the site and not necessarily to the actual construction company.
Tenure	Five tenure types are specified:- HA - Housing Association for rent LA - Local Authority PRIV - Private MOD - Ministry of Defence Other - Other tenure, i.e. housing association shared ownership or low cost home ownership and joint venture between a local authority and a private developer.
Area	Site areas are quoted in hectares and represent the gross area of the site.
Units	The capacity of sites is expressed as a number of house units. For sites where no detailed housing layout has yet been prepared and no density has been specified, then an estimate has been made.
Serviced	Indicates the number of housing units which are serviced.
Not built	Total number of house units on the site which have not yet been built at the date of the update.
Effective	Currently effective (EFF) or constrained (CON)
LPR	Local Plan Site Reference

Land Use	Categorises the main existing or former use of a site before it is rezoned or developed. The land use categories used are:- AGR 1-7 Agricultural Land by Class (1, 2 & 3. 1 = prime) AG BLDG Agricultural Building WOOD Woodlands (may also be grazed) HORT Allotments and nurseries PRIV/PUB OS Privately or publicly owned open space (e.g. Grounds of a large house or hospital) RESID Residential COMM Commercial EDUC Educational RAIL Railway MOD Ministry of Defence PUB BLD Public Building UNUSED Derelict, Vacant, Backland etc. COMMTY Community IND Industry
Greenfield/ Brownfield	Describes whether the site is within an urban area or previously developed (brownfield) or outwith the urban area and not previously developed (greenfield).

APPLICATION DETAILS

Applic Ref	Reference number of planning applications relating to the development of the site. Note where applications are made for individual plots within a site, these have been grouped together under the Application Reference 'Individs' with no decision date given.
Units	Number of units relating to each planning application.
Type	Describes the type of permission application:- OUT Application for Outline Planning Permission DET Application for Full Permission or Permission of Reserved Matters
Decision	Details of decision on the application. Apart from self explanatory terms – Approved, Refused, Withdrawn, Expired, Pending, it has been necessary to indicate the latest classified either as 'Superseded' or 'Duplicate'.
Dec. Date	Date of final decision on the application.

COMPLETION DETAILS

Built	Take up rates (in house units) for the previous 5 years are listed on an annual basis and assessments of subsequent completions are also listed annually for the next 5 years.
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INDUSTRIAL SITES

Only those industrial estates that were or are likely to be potentially available for sale or lease to industries are included. Areas reserved for the expansion of one specific existing industry are not included.

Development rates (land take up in hectares) have been prepared after an assessment of market trends, an appraisal of industrial land enquiries, outstanding planning permissions, advance factory programmes and site leasing information. The definition of development used in these schedules considers that once a building has been erected on a plot then the whole plot has been developed, although further building may take place within the plot.

The following definitions and classification apply:-

SITE DETAILS

Site Ref	Council/Settlement or Parish/Industry/Sequential Reference Number
Location	As for housing schedules
Owner	As for housing schedules
Developer	As for housing schedules
Tenure	Four tenure types are specified: LA Local Authority PRIV Private MBSE Moray Badenoch & Strathspey Enterprise HIE Highlands and Islands Enterprise
Greenfield/ Brownfield	As for housing schedules
Ind	Describes whether the site is allocated for industrial purposes in the current development plan
Gross	Total area (in hectares) within the boundary
Undev area	Total area of undeveloped land
Serv	The area of the industrial estate for which is serviced and readily available
LPR	As for housing schedule
Zoning Type	The procedure involved in the initial designation of the site for industrial purposes.
Land Use	As for housing schedule

APPLICATION DETAILS

Applic Ref	Reference Number of planning applications relating to the development of the site.
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COMPLETION DETAILS

Built	Take up rates (in hectares) for the previous 5 years are listed on an annual basis to date. Take up rates refer to the summation of the net area of individual plots upon which a first building has been constructed in the year. Unless the plot can be clearly subdivided into phases then the completion of the first development is assumed to constitute the take up of the whole plot.
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OPPORTUNITY SITES

The opportunity sites schedule lists sites designated in the Moray Local Plan 2000 and the emerging Moray Local Plan 2008 and indicates their preferred use. When planning applications are received for these sites they will be transferred into the Housing or Industrial Schedules as appropriate.