

OCTOBER 2024

Moray Employment Land Audit



moray
council





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1. Introduction

1.1 Purpose of Audit

The Moray Employment Land Audit provides an overview of the supply and availability of employment land across the Moray Local Development Plan area. The audit is an annual document and includes figures for take up and sites under construction.

The audit provides an evidence base for the monitoring and review of policies and proposals included within the Local Development Plan. In addition, it can help to identify areas where further analysis and investigation is required. The baseline against which information is analysed is 1st January 2024.

The information contained in the Employment Land Audit will also be of use to businesses, developers, and other organisations with an interest in employment land in Moray.

1.2 Methodology

The audit is prepared from information gathered by Council planning officers through monitoring of the development plan, planning approvals and individual inspections.

All employment sites in the existing local development plan have been recorded in a data base, unless the site has been built out in its entirety. In addition to sites allocated in the Moray Local Development Plan 2020 any windfall sites with planning consent for employment uses have been added to the database unless these are constrained to a single user (e.g. a distillery). It is noted that land with buildings that are vacant are not included in the audit nor are redeveloped sites.

Once sites have been identified officers undertake a review of planning applications and collect information such as ownership, proposed use etc. for each site. Officers also undertake site visits to monitor development activity. This information is then updated in the data base. The data is then analysed to produce the audit report.

2. Background

2.1 National Planning Framework 4 (NPF4)

NPF4 was adopted on 13 February 2023 and now forms part of local development plans and sets out the Scottish Government's policies in relation to supporting economic development in Scotland. This replaces NPF3 and Scottish Planning Policy and since its adoption it forms part of the current Local Development Plan.

NPF4 requires LDP's to allocate sufficient land for business and industry, taking into account business and industry land audits, to ensure that there is a suitable range of sites that meet current market demand, location, size, and quality in terms of accessibility and services. This allocation should take account of local economic strategies and broader objectives of delivering a low carbon and net zero economic recovery, and a fairer and more inclusive economy.

NPF4 requires LDP's to identify suitable sites for business, general industrial and storage and distribution uses and to enable alternative ways of working such as home working, live-work units and micro businesses. The ELA is undertaken annually to monitor the location, size, planning status, existing use, neighbouring land uses and any significant land use issues of sites within the existing business land supply which is fed into the review of the LDP.

2.2 Moray Local Development Plan

NPF4 and the Moray Local Development Plan 2020 now form the statutory Development Plan for Moray. LDP's already adopted will continue to be part of the development plan and existing LDP land allocations will be maintained. The Moray Local Development Plan 2020 was adopted on 27 July 2020 and designates land for employment uses within towns. Sites from the 2020 plan were first included in the 2020 audit.

The adoption of NPF4 introduces a change to the requirements for Local Development Plans given that there is now a suite of national policies forming part of the Local Development Plan for which planning applications will be determined against.

The Moray Local Development Plan 2020 already sets out the employment land policies for the Planning Authority (excluding the Cairngorms National Park area) related to economic development. These seek to safeguard employment land and support development of employment uses on designated sites. The policies also look at the types of uses that will be supported on designated sites. A more flexible approach to rural business proposals is provided for, with policy criteria used to ensure the most appropriate locations are supported in rural areas.

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

The Moray Economic Strategy was published in November 2022. The strategy takes account of changes in the economic landscape since 2012. It also reflects the work undertaken for the emerging Moray Growth Deal. The strategy is for the period 2022-2032 and maintains the overall objective to grow and diversify the economy and focuses on achieving four outcomes, one of which is supporting the economy through the provision of employment land for businesses of all sizes to locate.

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

One of four priorities within the Moray Community Planning Partnership Local Outcomes Improvement Plan is "Developing a diverse, inclusive and sustainable economy." Whilst employment land supply is not a performance indicator within the Local Outcomes Improvements Plan land supply is important for achieving outcomes.

2.5 Demand for Employment Land

Discussion with stakeholders as part of the Moray Business Property Needs Study (completed by Ryden LLP for Moray Council) found that demand in the area is generally focused on smaller units from small local businesses however there also needs to be larger sites available for inward investment and scale-up. From the business survey completed as part of the study, 73% of respondents had a requirement to expand/re-locate with the majority seeking industrial property. Cost was a key consideration in deciding on new premises as was digital connectivity, size and energy efficiency. A lack of suitable properties was raised as a constraint by those who have started to look for new/additional premises.

Whisky distilling has seen considerable expansion over recent years, including bonded warehousing and this demand is likely to be continue and increase. It was also found the organisations such as Orbex and the Ministry of Defence were capitalising on growth within the aerospace sector creating demand within the sector, often with large space requirements. There is significant opportunity associated with the renewable energy sector with expected growth in on and off shore wind and hydrogen developments in the area. There was also considered to be demand for larger bespoke premises including from the transportation sector. It was noted that currently it was unfeasible because of construction costs for businesses to build their own large bespoke premises and that developers are not building these units in the area currently. As a result, some companies were reported to be experiencing restricted growth within unsuitable premises. Discussion also considered that there could be more support for SMEs to enable them to gradually expand and step up their space requirements.

Some businesses were considered to be "battening down the hatches" following impacts from the Covid 19 pandemic, Brexit and the continuing impacts of the energy crisis and inflation. This was seen to be particularly the case for retail and hospitality. Other issues that were raised included where demand will be met in Elgin was raised in discussion given that the majority of sites at Elgin Business Park/Barmuckity are developed, sold or under offer.

Sufficient land and buildings require to be available in to facilitate wider economic development and to support the vision of the Moray Economic Strategy and support economic recovery.

3. Employment Land Supply

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

Detailed information on the established, constrained, effective and immediately available sites is provided in Appendix 2.

3.1 Established Employment Land Supply

The established employment land supply for Moray is shown in figure 1. There has been a decrease in the gross established supply by 0.63 ha since 2021. This decrease is due to development at 17 Barmuckity/Elgin Business Park and 12 Chanonry Industrial Estate, and Ashgrove (Elgin).

Figure 1 Established Employment Land Supply (2024) (Figures in hectares)

Gross Established	Net Established	Number of Sites
330.1	251.43	37



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

Figure 2 Established Employment Land Supply by town (2024) (Figures in hectares)

Town	Gross Established	Net Established	Number of Sites
Elgin Market Area	202.03	155.44	19
<i>Elgin</i>	124.18	94.15	11
<i>Lossiemouth</i>	12.8	10.24	1
<i>Mosstodloch</i>	63.44	49.95	6
<i>Troves</i>	1.61	1.1	1
Forres	55.48	34.77	4
Buckie Market Area	43.96	37.46	6
<i>Buckie</i>	43.15	36.81	5
<i>Cullen</i>	0.81	0.65	1
Keith	10.58	9.12	5
Speyside Market Area	17.05	14.64	3
<i>Aberlour</i>	1	1	1
<i>Roths</i>	17.05	13.64	2

ELGIN MARKET AREA -There has been an increase in the established gross and net supply within the Elgin Market area compared to 2023 with the addition of a new site to reflect the approved expansion of the James Jones sawmill in Mosstodloch. However, this site is marked as constrained as it is for a single user. Across the HMA there has been few completions. Two plots are currently under construction at I7 Barmuckity/Elgin Business Park

FORRES MARKET AREA - There has been no change to the established supply in the Forres Market Areas compared to 2023.

BUCKIE MARKET AREA - There has been no change to the established supply in the Buckie Market Areas compared to 2023.

KEITH MARKET AREA - There has been a decrease of 0.52ha of the gross and net supply due to the occupation of units at Westerton Road.

SPEYSIDE MARKET AREA - There has been an increase in the established supply (16.3 ha) to reflect the approval for a malt production facility at Greens of Roths. However, this site is marked as constrained as it is for a single user.

The established employment land supply has also been broken down by size of site to provide an indication of the range of size of sites available.

Figure 3: Established Employment Land Supply by site size (2024) (Figures in hectares)

Site area	Net Established	Number of Sites
0 - 1ha	4.23	6
1 - 5 ha	27.43	14
>5 ha	219.77	17

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

Figure 4: Net supply by type (2024). Figures in hectares

	Net Area	Number of Sites
General Industrial	186.06	30
High Amenity	54.59	12

Figure 5: Net supply by Market Area and type (2024). Figures in hectares

Market Area	General Industrial	Number of Sites	High Amenity	Number of Sites
Elgin	114.63	17	32.71	6
<i>Elgin</i>	<i>58.46</i>	<i>9</i>	<i>27.59</i>	<i>5</i>
<i>Lossiemouth</i>	<i>5.12</i>	<i>1</i>	<i>5.12</i>	<i>1</i>
<i>Mosstodloch</i>	<i>49.95</i>	<i>6</i>		
<i>Troves</i>	<i>1.1</i>	<i>1</i>		
Forres	21.3	3	10.27	1
Buckie	30.44	4	7.02	2
<i>Buckie</i>	<i>30.44</i>	<i>4</i>	<i>6.37</i>	<i>1</i>
<i>Cullen</i>			<i>0.65</i>	<i>1</i>
Keith	6.05	4	3.59	2
Speyside	13.64	2	1	1
<i>Aberlour</i>			<i>1</i>	<i>1</i>
<i>Rothies</i>	<i>13.64</i>	<i>2</i>		

3.2 Marketable/Effective Employment Land Supply

The marketable and effective employment land supply in 2024 is shown in figure 6. Overall the marketable/effective area has decreased by 1.19 hectares compared to 2023. The number of effective sites has decreased by one due to the occupation of units at Westerton Road, Keith and construction activity on two sites at I7 Barmuckity/Elgin Business Park.

Figure 6: Marketable/Effective Employment Land Supply (2024)

Marketable/Effective (Net figure in hectares)	Number of Sites
98.68	20

The marketable/effective employment land supply has been broken down by market area in figure 7. Annual requirements established through historic demand studies, build out rates recorded in previous audits, and from discussions with HIE and Moray Council Estates have been used to provide the estimated number of years supply available. It is noted that previously it was desirable to have a five year effective land supply at all times and therefore previous Local Development Plans sought to designate a minimum of 10 year land supply. However, to ensure a generous supply, increase choice and the prospect of a 10 year replacement period for future Local Development Plans, the Moray Local Development Plan 2020 sought to designate a minimum of 15 years supply.

Figure 7 Marketable/Effective Employment Land Supply by market area (2024)

Market Area	Marketable/ Effective (Net figure in hectares)	Number of Sites	Estimated Annual Requirements	Available Supply in years
Elgin	55.84	9	2.8	20 years
Forres	13.02	1	0.8	16 years
Buckie	21.69	3	0.8	28 years
Keith	4.78	3	0.4	13 years
Speyside	1.7	2	0.4	4 years

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

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

and Use Class 11 Assembly and Leisure) are identified to help support delivery of the site as a whole. A breakdown of the type of sites is shown in figures 8 and 9 below. It is noted that some sites will be counted in both the General Industrial and High Amenity figures as on larger sites part of the site may be identified for a greater mix of uses.

Figure 8: Effective area by type (2024) Figures in hectares.

	Effective Area	Number of Sites
General Industrial	63.28	16
High Amenity	36.59	8

Figure 9: Effective area by Market Area and type (2024). Figures in hectares.

Market Area	General Industrial	Number of Sites	High Amenity	Number of Sites
Elgin	39.39	9	16.55	3
<i>Elgin</i>	25.49	7	16.55	3
<i>Mosstodloch</i>	12.8	1		
<i>Troves</i>	1.1	1		
Forres	2.75	1	10.27	1
Buckie	15.32	2	7.02	2
<i>Buckie</i>	15.32	2	6.37	1
<i>Cullen</i>			0.65	1
Keith	3.55	3	1.75	1
Speyside	0.6	1	1	1
<i>Aberlour</i>			1	1
<i>Roths</i>	0.6	1		

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

3.3 Immediately Available

The immediately available employment land supply in 2024 is shown in figure 10. The immediately available supply decreased by 1.69 ha compared to 2023. The decrease is due to construction activity at I7 Barmuckity/Elgin Business Park and a completion in Keith. As noted above, due to continued take up at I7 Barmuckity/Elgin Business Park it is anticipated that the level of immediately available land in the Elgin Market Area will reduce significantly over the next few years. Bringing forward and servicing new sites will be critical to maintaining supplies.

Figure 10: Immediately available Employment Land Supply (2024)

Immediately Available (Net figure in hectares)	Number of Sites
31.94	5

3.4 LONG

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

Figure 11: LONG sites 2024

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

3.5 Constrained

The established land supply that is subject to constraints is shown in figure 12. This has increased by 26.64 hectares since the 2023 audit due to the addition of two additional sites which reflect recent planning approvals. These are the James Jones expansion in Mosstodloch and the malt production facility at Greens of Rothes. Both are constrained due to them being for a single user.

Figure 12: Constrained Employment Land Supply (2024)

Constrained Supply (Net figure in hectares)	Number of Sites
104.67	17

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

Figure 13: Constrained Employment Land Supply by constraint (2024) (Net figures in hectares) Note some land may fall under more than one constraint.

Constraint Type	Constrained Supply	Number of Sites
Infrastructure	45.75	8
Ownership	40.79	6
Physical	61.98	11

3.6 Take up and Construction

The number and area of proposals completed in the year to 1st January 2024 is shown in figure 14 below. This includes completion or occupation of sites at I7 Barmuckity, and units in Keith. This is a drop in construction from previous years (4.68 in 2021 and 4.74ha in 2022). While this may be the case a number of planning applications have been approved over the audit year and it is anticipated that take up of these will form part of the next audit.

Figure 14 Employment land completed/taken up in year to 1st January 2024

Take up area (Gross figure in hectares)	Number of Sites
0.52	1

The number and area of proposals under construction on the base date of 1st January 2024 is shown in figure 15 below. This is a decrease in construction activity compared to 2022 (4.7ha) and is similar to the level recorded in audits completed in 2015-2019 which ranged from 2.31ha to 5.25ha.

Figure 15: Employment land under construction at 1st January 2024

Under Construction (Gross figure in hectares)	Number of Sites
4.3	2

It is noted that this does not represent all building activity, and only that on designated sites or windfall sites that are not restricted to a single user. Other notable areas of activity primarily relate to expansion proposals of existing businesses, sites in the countryside and expansion of distilleries.

4. Conclusion

The Employment Land Audit has been carried out in this format for several years allowing comparison to be made to previous audits.

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

Around 32% (104.haha) of the Established Supply has some form of constraint that is likely to prevent the land being brought forward in the next five years and has not changed from the 2024 audit. This takes into account the addition of two new sites in Mosstodloch and Rothes which are marked as being constrained as they are for a single user.

There continues to be a limited choice of serviced sites/immediately available sites across all settlements with only 5 sites being classed in this category. A number of consents were approved on identified sites in 2023 along with a number of sites which are now deemed to be under construction. It is anticipated that several of these will be implemented and brought forward which will be reflected in next years ELA.

The availability of Immediately Available employment land is a Key Measure in the Moray Economic Strategy and will be a focus for the next Moray Local Development Plan.

In figure 16 is a summary by market area.

Figure 16 Market Area Summary

<p>Elgin (including Lossiemouth and Mosstodloch)</p>	<p>Development at Barmuckity/Elgin Business Park (I7) is progressing with several plots now completed and others currently under construction. There continues to be significant interest in the remaining plots, including some of the larger plots. The 14 starter units at the back of the site are now complete. The high levels of take up at Elgin Business Park/Barmuckity (I7) suggest the level of Immediately Available land will reduce significantly over the next few years and therefore bringing new sites forward and servicing these is critical to maintaining a supply of serviced sites.</p> <p>At Chanonry (I2) and Linkwood East (I6) there continues to small areas of immediately available land but this has reduced to only a couple of small plots on each site available. At Chanonry there is a private development of 18 starter units that have been built with several now occupied. At OPP4 Ashgrove three general industrial and storage and distribution buildings (including ancillary trade counters) have been built and occupied.</p> <p>Bringing forward other sites within Elgin will be critical to maintaining a choice of immediately available sites. To the north of Elgin Newfield (I8) is being actively marketed increasing choice of sites across Elgin. Land has been identified at Burnside of Birnie (I16/LONG3) to meet future demand.</p> <p>Choice of sites is severely restricted in Lossiemouth, only Sunbank OPP1 or windfall opportunities are available. The topography and ground conditions at Sunbank OPP1 are considered to constrain the site.</p> <p>In Mosstodloch additional land is identified at I3 West of Mosstodloch and there are discussions ongoing with the landowner regarding the site.</p> <p>There are issues with delivery of higher quality business land. Strong demand continues for industrial buildings.</p>
<p>Forres</p>	<p>Very small choice of marketable/effective sites given settlement size and population, but reasonable areas available at the BP1 Enterprise Park. I4 Easter Newforres is understood to have high infrastructure costs that will likely require public sector funding support to make this site effective.</p> <p>There is continued demand for small offices at Horizon Scotland at BP1 Enterprise Park. Consent has also been granted for two small business units in the north west of BP1. The road extension has opened up an area for development to the south east of BP1.</p>

Forres	<p>The remaining land at Waterford (I2) is now constrained due to restricted access.</p> <p>Strong demand, particularly for smaller units and need for serviced employment land to allow businesses to develop and relocate from smaller units.</p>
Buckie	<p>Small choice of marketable sites but reasonable areas available. Significant area immediately available at I3 Rathven Industrial Estate. Redevelopment opportunities at harbour. Small site available at Cullen.</p> <p>The Moray Local Development Plan identifies a reserve of industrial land at March Road (LONG2) that could be brought forward if need arose.</p>
Keith	<p>Very small choice of marketable sites focussed around the Westerton Road area. Issues with providing readily accessible employment sites. Demand for smaller units but greatest demand is currently for battery storage and development linked to Blackhillock where a masterplan for this area is currently being progressed. An energy management facility that was previously noted as being under construction on the I3 Westerton Road East designation is now complete. A cooerage including office staff facilities storage yard and associated works was approved on the I4 Bridge Street designation. This development has not yet commenced.</p> <p>Opportunities for higher amenity employment uses promoted within a mixed use site to the south of Banff Road (MU).</p>
Speyside	<p>Severely limited choice of designated sites. There is a need for sites for small local businesses in Speyside. The Moray Local Development Plan 2020 identifies a site at Speyview (R2) where 1ha of the housing site is identified for employment uses. The removal of a site during the Examination of the Moray Local Development Plan 2020 means there is a reliance on windfall proposals supported through policy.</p>

5. Glossary

Constrained Employment Land Supply

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

Employment Land

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

Established Employment Land Supply

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

Gross

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

Immediately Available Land Supply

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

Marketable/Effective Land Supply

This is land that as well as meeting business requirements, has a secure planning status, can be serviced within 5 years, is accessible by walking, cycling and public transport as defined by SPP. Land that is subject to user restrictions or that is held as 'option land' for existing companies' own expansion cannot be considered to be marketable. Such land is not constrained.

Net

The total area of land excluding roads, landscaping etc. As the physical attributes of a site and surrounding land uses will determine the area suitable for development and the level of landscaping required the net area will vary. For sites that are partially complete, the net area given is the area that is actually available to be developed. For sites that are undeveloped the net area is estimated. This estimate is based on an assumption that on average, 20% of available land will be taken up with roads, landscaping etc. If relevant site information is available, this is taken into account in the estimate.

Take-Up

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

Under Construction

This is the area of land under construction at the base date. These sites are not yet complete. The area under construction area is not included within the land supply or built totals.

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

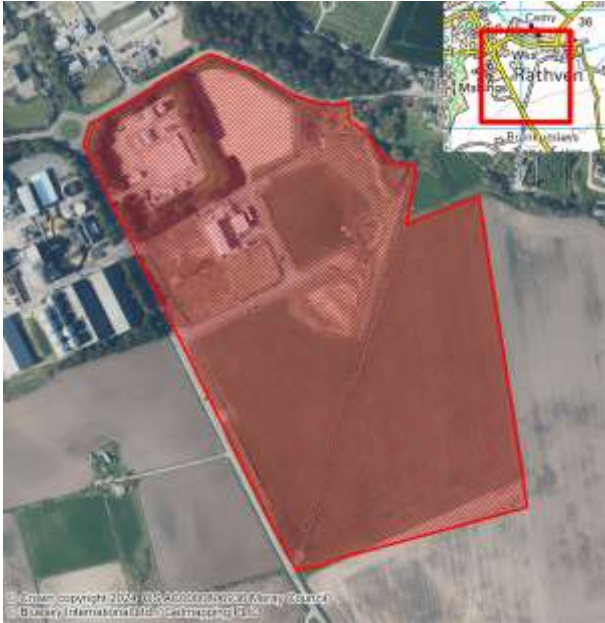
Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/BC/E/004	Town:	BUCKIE
Supply Type:	Effective	LPR:	20/13
Location:	March Road (SE)		
Grid Ref:	343984	865510	



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 8.5

Development (Ha):

Built:	5.96	Under Construction:	0
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Reference:	M/BC/E/006	Town:	BUCKIE
Supply Type:	Part Constrained	LPR:	20/15
Location:	The Harbour Area		
Grid Ref:	343086		865957



Established Supply (Ha):

Gross Established: 1.77 Net Established: 1.77

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 1

Development (Ha):

Built: 20.97 Under Construction: 0

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



Established Supply (Ha):

Gross Established: 7.02 Net Established: 5.62

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 5.62

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established:	0.81	Net Established:	0.65
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Effective Supply (Ha):

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/EL/E/001	Town:	ELGIN
Supply Type:	Part Constrained	LPR:	20/17
Location:	Elgin Business Park, Barmuckity		
Grid Ref:	324719		861725



Established Supply (Ha):

Gross Established:	33	Net Established:	21.45
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Effective Supply (Ha):

Effective:	15.59	General Industrial:	8.64
Immediately Available:	8.9	High Amenity:	5.95

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 5.86

Development (Ha):

Built:	2.9	Under Construction:	3
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established: 4.12 Net Established: 3.3

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 3.3

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/EL/E/004	Town:	ELGIN
Supply Type:	Constrained	LPR:	20/I12
Location:	Glen Moray Distillery		
Grid Ref:	319932		862424



Established Supply (Ha):

Gross Established: 1.3 Net Established: 1.3

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 1.3

Development (Ha):

Built: 6.5 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established:	3.17	Net Established:	1.89
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Effective Supply (Ha):

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 1.22

Development (Ha):

Built:	10.36	Under Construction:	0
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Reference:	M/EL/E/011	Town:	ELGIN
Supply Type:	Effective	LPR:	20/15
Location:	Pinefield Industrial Estate		
Grid Ref:	322991		862330



Established Supply (Ha):

Gross Established:	0.18	Net Established:	0.18
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Effective Supply (Ha):

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	12.23	Under Construction:	0
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established: 22.3 Net Established: 17.87

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 8.87

Development (Ha):

Built: 0 Under Construction: 0

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



Established Supply (Ha):

Gross Established: 38.2 Net Established: 30.56

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 20.74

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 9.8

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established: 7 Net Established: 5.6

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

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



Established Supply (Ha):

Gross Established: 1.2 Net Established: 1

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	17.92	Under Construction:	0
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Reference:	M/FR/E/006	Town:	FORRES
Supply Type:	Constrained	LPR:	20/I3
Location:	Benromach Distillery		
Grid Ref:	303187		859423



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

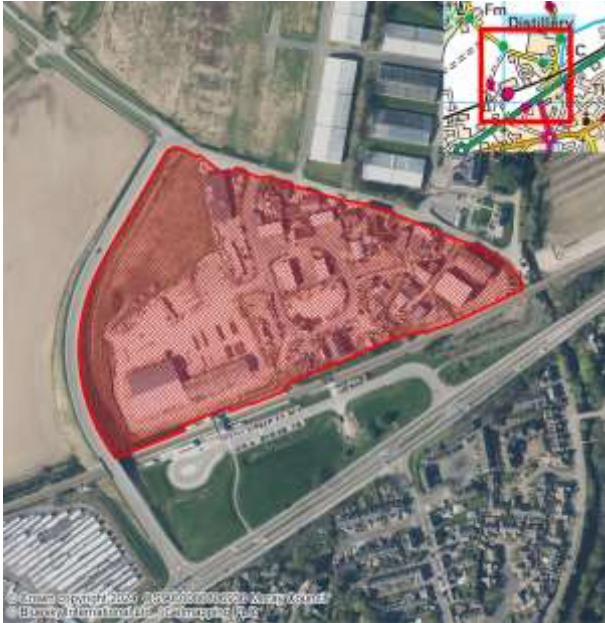
Constrained Total (Ha): 3.2

Development (Ha):

Built:	4	Under Construction:	1.3
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established: 1 Net Established: 0.8

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0.8

Development (Ha):

Built: 6.2 Under Construction: 0

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



Established Supply (Ha):

Gross Established: 27.6 Net Established: 17.75

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 17.75

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	1.72	Under Construction:	0
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Reference:	M/KH/E/005	Town:	KEITH
Supply Type:	Constrained	LPR:	20/17
Location:	Isla Bank Mills		
Grid Ref:	342764	851453	



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 1.84

Development (Ha):

Built:	4.03	Under Construction:	0
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/KH/E/012	Town:	KEITH
Supply Type:	Effective 5years+	LPR:	20/LNG2
Location:	Westerton Road (LONG)		
Grid Ref:	343822		850218



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	2.5
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	0
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Reference:	M/LS/E/007	Town:	LOSSIEMOUTH
Supply Type:	Constrained	LPR:	20/OPP1
Location:	Sunbank		
Grid Ref:	323075		869644



Established Supply (Ha):

Gross Established:	12.8	Net Established:	10.24
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Effective Supply (Ha):

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 10.24

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established:	2.22	Net Established:	1.78
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Effective Supply (Ha):

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 1.78

Development (Ha):

Built:	12.05	Under Construction:	0
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Reference:	M/MS/E/005	Town:	MOSSTODLOCH
Supply Type:	Constrained	LPR:	20/12
Location:	North of Baxter's		
Grid Ref:	333613		860016



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 2.57

Development (Ha):

Built:	0	Under Construction:	0
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The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established: 11 Net Established: 8

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 8

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/MS/E/007	Town:	MOSSTODLOCH
Supply Type:	Effective	LPR:	20/I3
Location:	West of Mosstodloch		
Grid Ref:	331976	860333	



Established Supply (Ha):

Gross Established: 16 Net Established: 12.8

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established: 14 Net Established: 11.2

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 11.2

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/MS/E/009	Town:	MOSSTODLOCH
Supply Type:	Constrained	LPR:	
Location:	James Jones Expansion		
Grid Ref:	333256		860661



Established Supply (Ha):

Gross Established: 17 Net Established: 13.6

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG:

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 13.6

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

Gross Established: 0.75 Net Established: 0.6

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

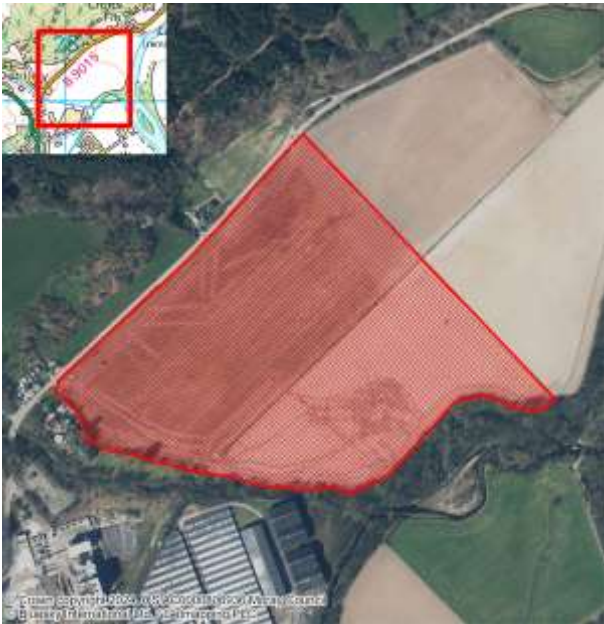
Owner Infrastructure Physical

Constrained Total (Ha): 0

Development (Ha):

Built: 0 Under Construction: 0

Reference:	M/RS/E/007	Town:	ROTHES
Supply Type:	Constrained	LPR:	
Location:	Greens of Rothes		
Grid Ref:	328029	850205	



Established Supply (Ha):

Gross Established: 16.3 Net Established: 13.04

Effective Supply (Ha):

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

LONG Supply (Ha):

LONG: 0

Constrained

Owner Infrastructure Physical

Constrained Total (Ha): 13.04

Development (Ha):

Built: 0 Under Construction: 0

The Moray Council Employment Land Audit 2024

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



Established Supply (Ha):

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

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

LONG Supply (Ha):

LONG:	0
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Constrained

Owner
 Infrastructure
 Physical

Constrained Total (Ha): 0

Development (Ha):

Built:	0	Under Construction:	
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October 2024