



**Local Development Plan 2
Monitoring Statement**

**October
2019**

Appendix 1 - Business Land Review



sustainable thriving achieving

East Dunbartonshire Council

www.eastdunbarton.gov.uk

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Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator.

This document must only be treated as a draft unless it has been signed by the Originators and approved by a Business or Associate Director.

DATE

April 2019

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Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

1 INTRODUCTION

- 1.1 GL Hearn was commissioned by East Dunbartonshire Council to undertake a comprehensive review of the business, industrial and employment land and premises within its administrative boundaries.
- 1.2 The purpose of this exercise is to gain a better understanding of current activity and identify opportunities for future economic growth and investment within East Dunbartonshire. It will also allow the Council to review whether business land and premises is currently meeting demand effectively.
- 1.3 This study will identify market needs and assess these against the land and premises currently available. It will establish the effectiveness and suitability of each existing business site for various sectors and establish what actions may be necessary to ensure that the employment land is attractive for both existing and potential business investors.
- 1.4 Finally, this report will inform the East Dunbartonshire Local Development Plan 2, together with the Council's Economic Development Strategy and the approach to marketing business sites.

Structure

- 1.5 To accomplish this, we have structured the report as following:
 - [Chapter 2](#): Policy and Evidence Review
 - [Chapter 3](#): Baseline Economic Analysis
 - [Chapter 4](#): Property Market Review
 - [Chapter 5](#): Business Survey
 - [Chapter 6](#): Appraisal of Existing Sites and Premises
 - [Chapter 7](#): Demand Assessment
 - [Chapter 8](#): Supply and Demand Balance
 - [Chapter 9](#): Conclusion and Recommendation

2 POLICY AND EVIDENCE REVIEW

2.1 This section reviews the current planning framework including Clydeplan and the East Dunbartonshire Local Development Plan and Economic Development Strategy together with the Ryden East Dunbartonshire Employment Land & Business Property Review 2012 that informed the adopted framework.

East Dunbartonshire Local Development Plan 2017-2022

2.2 East Dunbartonshire Council adopted the Local Development Plan (LDP) in February 2017. The Plan sets out the Council's long-term land use strategy and aims to guide future development and regeneration strategies.

2.3 Together with the Glasgow and Clyde Valley Strategic Development Plan, the LDP forms the Development Plan for East Dunbartonshire against which planning applications will be determined.

2.4 **Principal Policy 1 Sustainable Economic Growth** aims to ensure that all development proposals support sustainable economic growth. A particular emphasis should be given to point G, which encourages the "provision of permanent employment opportunities through development of business and employment sites", together with point H which states that "the development of key sectors such as finance and business services, tourism and green energy will be encouraged".

2.5 In addition, **Policy 13 Creating a Supportive Business and Employment Environment** aims to create a supportive business environment in order to generate jobs within the area, including supporting and encouraging the increase in homeworking. The policy aims to provide high-quality sustainable places for business and employment. Development proposals within the green technology, finance and business services, and tourism and leisure sectors will be particularly supported.

2.6 As part of this Policy, the Community Strategies sections set out a range of business and employment sites across East Dunbartonshire together with opportunities the sites provide and any requirements for future development applications.

2.7 Finally, recognising Tourism as one of the key important sectors across Scotland, **Policy 14. Tourism** supports the development and expansion of tourism opportunities throughout East Dunbartonshire, taking advantage of its rich heritage, proximity to a range of tourist attractions, attractive countryside setting and recreational potential.

East Dunbartonshire Economic Development Strategy 2017-2020

- 2.8 This strategy is the delivery plan for the East Dunbartonshire Economic Partnership (EDEP)¹, outlining how they plan to improve the local economy and work towards achieving Local Outcome 1.
- 2.9 EDEP have identified 4 priority areas on which to focus resources over the 2017-20 period, these include:
- Town and Village Centres – We aim to increase footfall by maintaining attractive and accessible town centres in which residents and visitors want to spend their time
 - Business Growth and Support – We want to create high quality jobs by attracting inward investment and giving local businesses the support they need to grow
 - Increasing Tourism – We want to make the most of East Dunbartonshire's many assets by further development and broader advertising
 - Sustainable Development – We aim to enhance local environmental quality and encourage the growth of socially and environmentally responsible businesses
- 2.10 With regards to business growth and support the strategy contains an action plan with the planned activity of the East Dunbartonshire Economic Partnership until 2020. Key actions include:
- Business portal: the development of a portal that will act as a single point of access for businesses currently in the area, or looking to invest in the area to connect them to the information and services that they need
 - Business Land Audit and Business Land Review: The commission of this study (Action 14) together with the Business Audit (Action 13) are among the 8 actions undertaken to increase the understanding of the businesses base as well as the land and office space and encourage the economic growth of the Council area.
- 2.11 The strategy also refers to key development sites, namely Kirkintilloch Business Gateway and Westerhill Business Park that their development will boost the employment and economic output of the area and therefore these are fully supported by the council. Kirkintilloch Business Gateway is a 10.72 acre site which has existing consents for business use on 2.92 acres, while 40 acres south of Westerhill Business Park have been allocated for uses 4, 5 and 6.

Clydeplan Strategic Development Plan 2017

- 2.12 Clydeplan, also known as Glasgow and Clyde Valley Strategic Development Plan, aims to assist the preparation of Local Development Plans (LDPs) as a framework for development management. This is a statutory planning document and all LDPs require to be consistent with the SDP and to take account of the provisions of the SDP.
- 2.13 The Plan sets out the housing supply targets (**Schedule 7**) which is 2,260 new homes between 2012-29 for East Dunbartonshire distributed as below:

¹ which includes membership from Department for Work and Pensions, Dunbartonshire Chamber of Commerce, East Dunbartonshire Council, East Dunbartonshire Voluntary Action, Federation of Small Businesses, Scottish Enterprise, Skills Development Scotland, and Visit Scotland.

- 630 new social sector homes for 2012-24;
- 1,610 new private homes for 2012-24; and
- 20 additional private homes for 2024-29

- 2.14 In terms of economy & employment, **Policy 5 Strategic Economic Investment Locations** (SEILs) set out in Schedule 3 and Diagram 4 are the city region's strategic response to delivering long-term sustainable economic growth. To support the Vision and Spatial Development Strategy, Local Authorities should safeguard and promote investment in the SEILs to support their dominant role and function and to address the opportunities/challenges. This may include providing opportunities for the expansion or consolidation of these locations, where appropriate.
- 2.15 In addition local authorities should identify the locations and circumstances when other uses commensurate to the scale of the SEILs non-dominant role and function will be supported. The Implementing the Plan and Development Management section of the Plan should be taken into account when considering non-dominant role/function uses within the SEILs.
- 2.16 **Schedule 3 Strategic Economic Investment Locations** does not include any location within East Dunbartonshire. The West of Scotland Science Park, which lies at the Southwest boundary with Glasgow City and Robroyston are the nearest SEILs to East Dunbartonshire.

Glasgow City Region - Regional Economic Strategy

- 2.17 The Glasgow City Region (GCR) brings together eight local authorities including East Dunbartonshire Council. The Regional Economic Strategy builds on the City Deal projects and targets and purposefully takes a long-term outlook to 2035.
- 2.18 The RES' vision is to create "A strong, inclusive, competitive and outward-looking economy, sustaining growth and prosperity with every person and business reaching their full potential". The aim of the strategy is sustained inclusive economic growth and sets a number of objectives to achieve this. The objectives include:
- Attract and retain talent and enterprises
 - Improve economic outcomes by improving skills and health
 - Create a skills and employment system that meets the current and future needs of businesses
 - Grow the presence of Scotland's six growth sectors in the city region
 - Significantly improve productivity through increased investment, innovation and exporting
 - Increase the number of sustainable high growth start-ups
 - Grow the local supply chain
 - Promote the city region globally with a focus on international investment
 - Increase new housing and commercial development and reduce brownfield land

- 2.19 The growth sectors identified by the Scottish government are Energy; Life Sciences, Financial and Business, Food and Drink, Sustainable Tourism and Creative Industries.
- 2.20 The plan looks to grow and strengthen the business base, increasing local competitiveness by improving productivity through fostering innovation. The Glasgow City Region will work to ensure that opportunities and benefits from growing the economy positively impact on the quality of lives of local people, tackling inequalities and disadvantage by providing them with the tools to find work, stay in work and improve their well-being - delivering economic success through inclusive growth.
- 2.21 The Regional Economic Strategy does not provide any East Dunbartonshire Specific policies or commentaries.

East Dunbartonshire Employment Land & Business Property Review July 2012

- 2.22 The Study informed the preparation of East Dunbartonshire Local Development Plan. The assessment concluded that with regards to the existing employment supply, some sites were identified as having potential for business use but, due to their location, are also attracting interest from alternative uses, in particular housing, such as Lower Kilmardinny (in Bearsden) and Kirkintilloch Gateway (Woodilee).
- 2.23 In addition, other sites needed to be reconsidered as employment land as they have either been built on or are thought not to be suited for business space such as St Andrews's Campus (Bearsden) or School Lane, Lennoxton.
- 2.24 A key recommendation was the measurement of undeveloped industrial and business sites within the allocated employment land supply.
- 2.25 The study also suggested that small offices could be developed as part of master planned regeneration in schemes such as Lower Kilmardinny in Bearsden and small workspaces can be developed adjacent to larger bespoke industrial developments such as Westerhill in Bishopbriggs.
- 2.26 In addition to these sites, Southbank in Kirkintilloch should continue to be classed as a strategic business location to give it the support it requires to attract occupiers to fill the business space still available there. Furthermore, there was considered to be an opportunity to promote light industrial space in Kirkintilloch; a location with merit is the undeveloped land adjacent to the successful Kirkintilloch Industrial Estate.
- 2.27 It was recommended that locations which were either performing poorly (in 2012) and/or may struggle to fulfil an effective employment land role in the future were better suited for an alternative use.

- 2.28 However the 2012 Review also highlighted that care should be taken not to constrain any remaining business uses or blight the development of new space in/ adjacent to that location. It was therefore suggested that sites should not be proactively de-designated, but changes of use should be considered for ineffective business land where there is clear demand for an alternative use.
- 2.29 It was also considered that a mix of uses may be more feasible in east and west of Milton Road in Kirkintilloch which comprised a large employment allocation. Finally, for some sites, like East High Street in Kirkintilloch, it was suggested that they would continue to evolve from traditional industrial uses to be more commercial/ quasi-retail in nature.

3 BASELINE ECONOMIC ANALYSIS

3.1 This section presents the economic baseline of East Dunbartonshire for the purpose of assessing business land requirements. Data is drawn from 2011 Census, Annual Population Survey (2018), the Business Register and Employment Survey (2017) as well as datasets published by the Scottish Government such as the Growth Sector Statistics Database (2018). We have also drawn conclusions from the Business Land Audit conducted in early 2018. In order to contextualise the data, the analysis below sets out wider comparators such as Scotland and the UK.

National Overview

3.2 UK economic growth picked up slightly in the second quarter of 2018 following a weak first quarter. The estimated 0.4% expansion in Q2 was up from 0.2% in Q1, which was blighted by weak construction and manufacturing output as well as subdued consumer spending amid inclement weather.

3.3 The “State of the Economy Report” produced by the Scottish Government in June set out the position of Scotland’s Economy. The report noted that the economy continued to grow into the first quarter of 2018 though at below trend rate.

3.4 Economic growth in Q2 was fuelled by stronger retail sales figures and a pick-up in the construction sector, both aided by the warmer weather. It was also supported by the continued strength of the labour market, with the unemployment rate holding steady at its 42-year low.

3.5 However, industrial production fell sharply, which contributed to a worsening trade deficit, and looking through quarterly fluctuations, the underlying trend is one of slower economic growth. Nevertheless, the Bank of England raised interest rates to 0.75% in August 2018, their highest level since March 2009.

3.6 The Scottish labour market also continues to perform strongly and was recorded as being close to record levels in terms of both employment and the rate of unemployment. The report also examined forecast growth which showed expected improvements for 2018 of between 0.7% and 1.3% with further increases expected further in 2019 to between 0.8% and 1.6%.

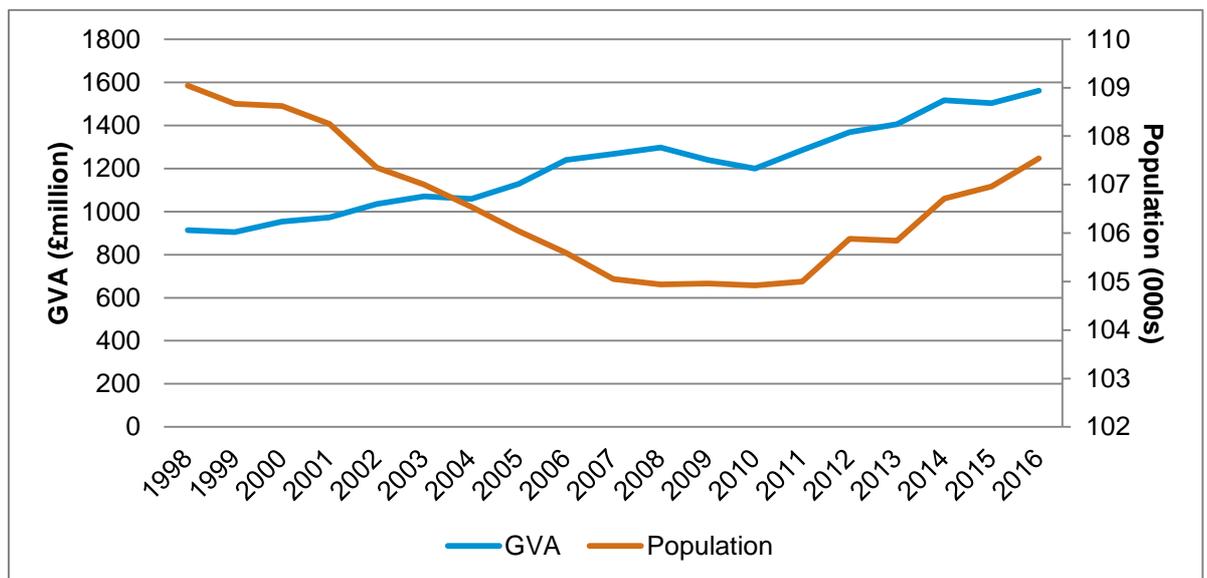
3.7 Oxford Economics (OE) revised down its UK GDP expectations in July 2018 (data is available through CoStar). OE expects the economy to grow by 1.3% this year and 1.4% in 2019, thus below the 1.5% and 1.7% previously expected and down from 1.8% in 2017. The forecasts have been modelled assuming that a UK and EU deal is established quickly, which may no longer be the case - this could mean lower growth still.

Local Trends

Gross Value Added

3.8 East Dunbartonshire’s economy produces goods and services valued at £1.56 billion per annum² (GVA) and supports 27,000 jobs³. The figure below illustrates the growth in GVA and in population since 1998.

Figure 1: Population and GVA Trend (1998-2016) – East Dunbartonshire



Source: ONS

3.9 GVA has increased by 71% since 1998 on an annual rate of 3%. However over the last 10 years the pace of growth has decreased to 2% per annum. It should be noted though that the post recessionary rate (post 2012) has recovered to 3%.

3.10 Population has fallen by 1% since 1998 - in particular, the period between 1998 and 2007 saw a decrease of 4%. During recession the population remained unchanged at 105,000 people, however there has been a post-recessionary increase of 2.5% raising the population to 108,000 people.

3.11 Compared to Scotland, East Dunbartonshire has seen a moderate growth in population since 1998 with an increase of 71% against the national equivalent of 90%. However the gap has closed over the last 5 years with an increase of 14% in the Council area against 15% nationally.

² ONS estimates of Balanced Gross Value Added, in current basic prices, allocated to local authorities in the UK in 2016

³ BRES 2016

3.12 In examining the age structure across East Dunbartonshire it is clear that the Council area has a far greater percentage of older persons (+65) than Scotland and this situation has grown notably since 1998.

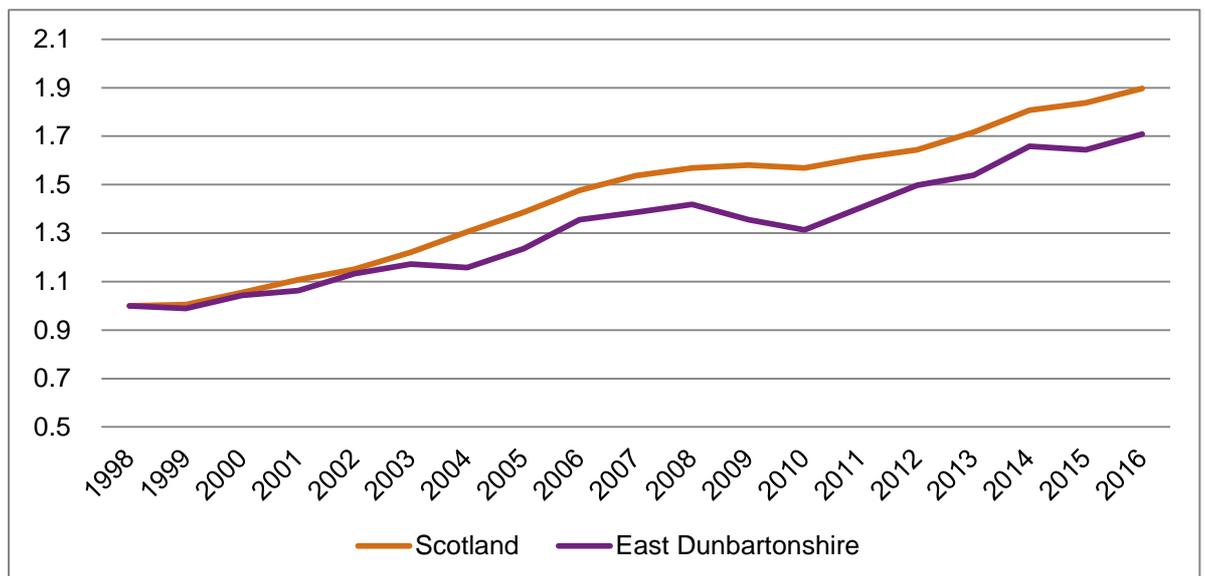
Table 1: Population Change b Age

Age	East Dunbartonshire				Scotland			
	1998		2016		1998		2016	
	Number	%	Number	%	Number	%	Number	%
0 to 15	22,677	20.8%	18,810	17.5%	1,002,589	19.7%	915,917	16.9%
16 to 24	11,440	10.5%	11,124	10.3%	565,647	11.1%	607,188	11.2%
25 to 49	38,854	35.6%	30,249	28.1%	1,849,226	36.4%	1,783,679	33.0%
50 to 64	20,252	18.6%	23,952	22.3%	867,029	17.1%	1,099,064	20.3%
Aged 65+	15,817	14.5%	23,405	21.8%	792,579	15.6%	998,852	18.5%
All Ages	109,040	100.0%	107,540	100.0%	5,077,070	100.0%	5,404,700	100.0%

Source: ONS

3.13 The comparatively low percentage of working age people in East Dunbartonshire's population could be a threat to the local economy in the long term - although economic growth can still be achieved through changing commuting patterns or more sustainable local housing growth suitable for younger families.

Figure 2: Indexed GVA Growth 1998-2016



Source: ONS

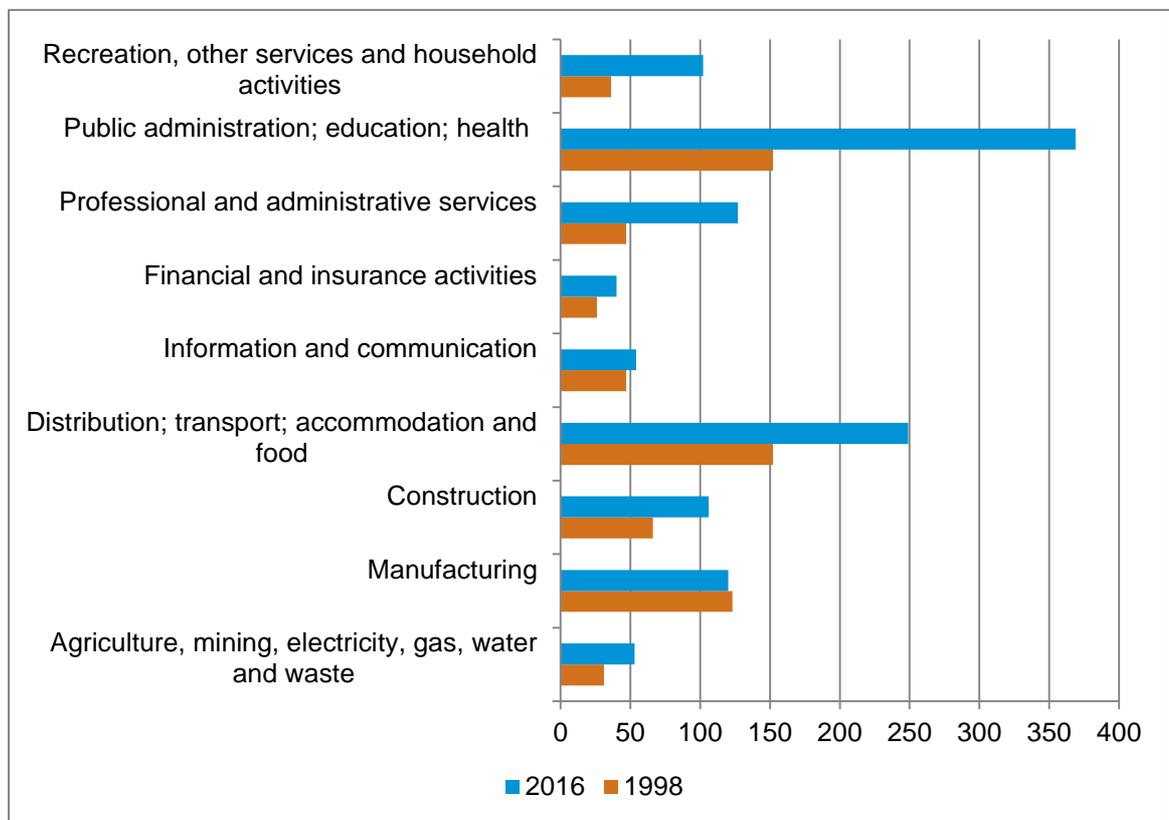
GVA Growth per sector

3.14 The figure overleaf shows the breakdown of East Dunbartonshire's GVA by sector in 2016 and compares it with the historic equivalent. The strongest contributors to GVA in the area are public

sector, including education and health, together with distribution, transport and food and accommodation⁴.

3.15 In proportional terms, recreation and other services (183%); professional and admin (170%) have seen a higher increase compared to public sector (143%) since 1998. These have also outstripped the increase shown in distribution, transport and food and accommodation (64%). All sectors have seen a growth in GVA over this period.

Figure 3: GVA by Sector 1998 and 2016 – East Dunbartonshire



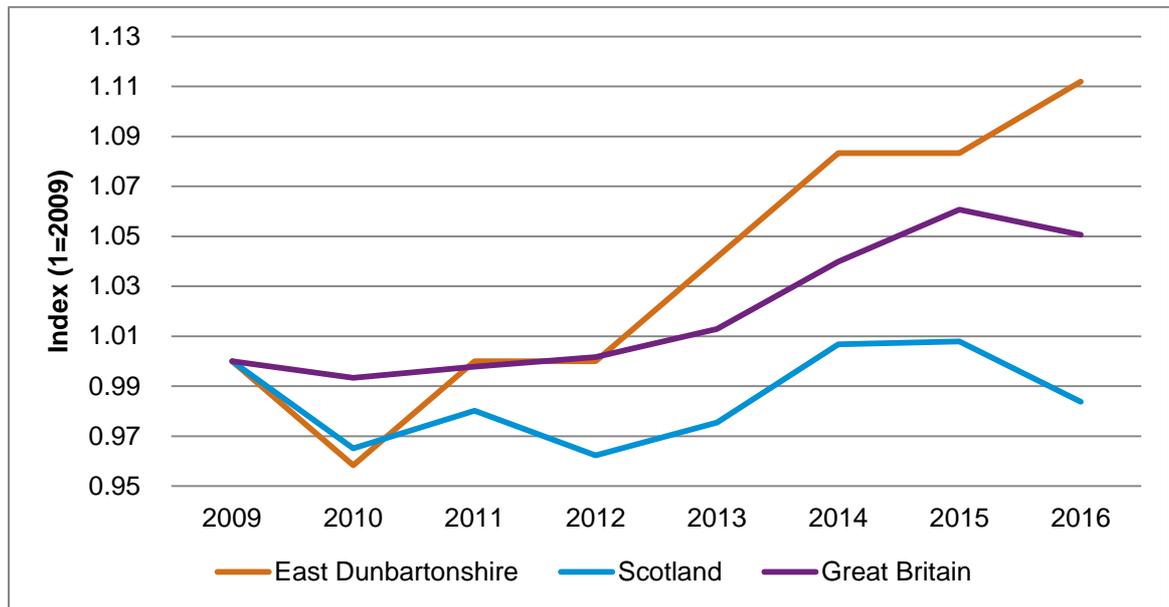
Source: ONS

Employment

3.16 There are a total of 27,000 jobs in East Dunbartonshire according to BRES 2016. Since 2009, there has been a growth of 11% in jobs, relating to an annual growth of 1.5%. To put this in context, Great Britain has seen an increase of 5% (or 0.7% annual rate), which is half of that seen in East Dunbartonshire. Scotland has experienced a decrease in job numbers since 2009 of -2% (or -0.2% per annum). The figure below shows the trends indexed to 2009.

⁴ Sectoral division is based on data availability by ONS.

Figure 4: Indexed Employment growth 2009-16



Source: BRES 2016

3.17 The decline across Scotland has been driven by falls in three key sectors (Manufacturing, Construction and Financial and insurance activities). Employment in the manufacturing sector is in long term decline due to automation. Both construction and finance sectors are likely to have been impacted by the recession.

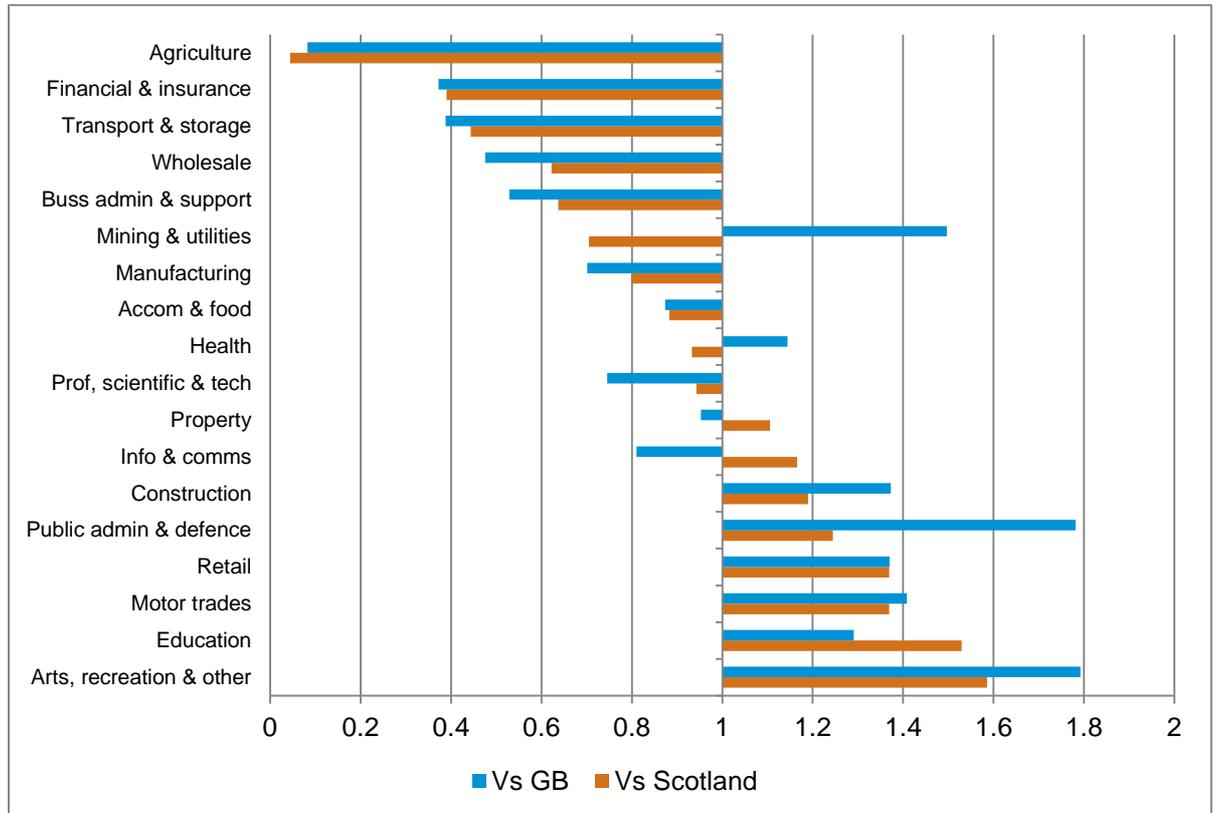
Employment structure

3.18 East Dunbartonshire's largest sector in terms of total employment numbers is Health (4,000 jobs), followed by Retail (3,500) and Education (3,000). Arts, entertainment, recreation and other services contribute to the structure by 2,250 jobs while Public Administration and defence contribute by 2,000. These top five sectors represent 55% of the employment in East Dunbartonshire.

3.19 We sought to run a location quotient analysis to reveal potential over or under representation within the employment structure. The local economy seems to have a significant public sector base and private services such as Retail.

3.20 As the figure below illustrates, the top sectors in terms of local representation, excluding Health, show strong advantages against both Scotland and Great Britain. In addition, Motor Trades and Construction present strong representation against the wider comparators.

Figure 5: Location quotient analysis 2016 East Dunbartonshire



Source: BRES 2016

Sectoral Change

- 3.21 Public administration and defence sector has seen the highest growth since 2009 relating to 60% (or in absolute terms to 750 additional jobs). Although agriculture seems to have grown dramatically with a change of 75%, in absolute terms this relates to only 15 jobs. The highest growth in absolute terms has been seen in Health where 1,000 additional jobs have been created since 2009. However, this is a large sector and therefore this level represents a growth rate of 33%.
- 3.22 The Arts, entertainment, recreation and other sectors have also increased significantly. A total of 750 new jobs, representing a growth of 50%, were created since 2009. Finally, the professional, scientific and technical sector has seen an increase of 40%, relating to 500 new jobs since 2009.
- 3.23 On the other hand, manufacturing, business administration and support, motor trades and wholesale have all shrunk by 100-250 jobs since 2009. Finally there are four sectors, construction, education, retail and transport, which have not seen any change in their employment numbers since 2009.

Table 2: Sectoral Change, 2009-2016

	East Dunbartonshire		Scotland		Great Britain	
	Growth rate	Annual rate	Growth rate	Annual rate	Growth rate	Annual rate
Agriculture	75%	8.3%	-56%	-11%	-56%	-11%
Mining & utilities	11%	1.5%	10%	1%	15%	2%
Manufacturing	-14%	-2.2%	-8%	-1%	-2%	0%
Construction	0%	0.0%	-9%	-1%	-8%	-1%
Motor trades	-22%	-3.5%	7%	1%	8%	1%
Wholesale	-17%	-2.6%	-3%	0%	3%	0%
Retail	0%	0.0%	-7%	-1%	-5%	-1%
Transport & storage	0%	0.0%	-1%	0%	11%	2%
Accommodation & food	0%	0.0%	-1%	0%	16%	2%
Info & communications	13%	1.7%	11%	1%	19%	2%
Financial & insurance	-13%	-1.9%	-9%	-1%	-2%	0%
Property	29%	3.7%	9%	1%	1%	0%
Prof, scientific & tech	40%	4.9%	4%	1%	23%	3%
Buss admin & support	-17%	-2.6%	1%	0%	24%	3%
Public admin & defence	60%	6.9%	1%	0%	-15%	-2%
Education	0%	0.0%	-4%	-1%	4%	1%
Health	33%	4.2%	5%	1%	11%	1%
Arts, recreation & other	50%	6.0%	21%	3%	5%	1%
Overall	11%	1.5%	-2%	0%	5%	1%

Source: BRES 2016

- 3.24 The table allows comparisons against Scotland and Great Britain. There are very few similar trends across any of the comparators, Information and Communications being an exception. Scotland has seen a significant increase in Arts & other sector (21%), together with Information and communications (11%), mining and utilities (10%) and Property (9%). Across Great Britain, Business administration and Professional, scientific and technical sectors have seen an important increase of 25%, followed by 19% in Information and Communication.

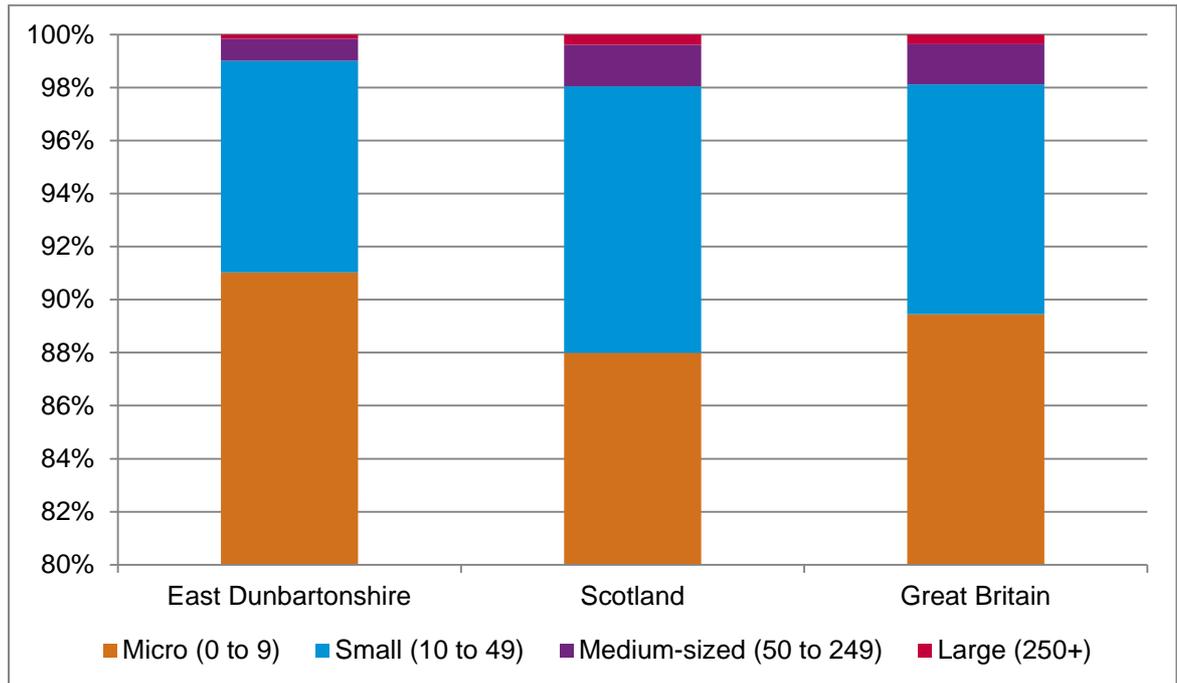
Business base and trends

- 3.25 A total of 3,010 businesses are currently active in East Dunbartonshire. This represents 2% of all businesses in Scotland.
- 3.26 The vast majority (91%) of all the enterprises in East Dunbartonshire are micro businesses of up to 9 employees' capacity. There are only 5 business with 250+ employees and 25 of 50-250 employees. As with the national picture, employment in East Dunbartonshire is not overly reliant on

a small number of major employers, providing the area with a level of resilience to a major downturn affecting a single business.

3.27 The figure below provides a comparison to wider geographies. All of the comparators have a similar distribution, with small businesses counting for over 88% of their total figures.

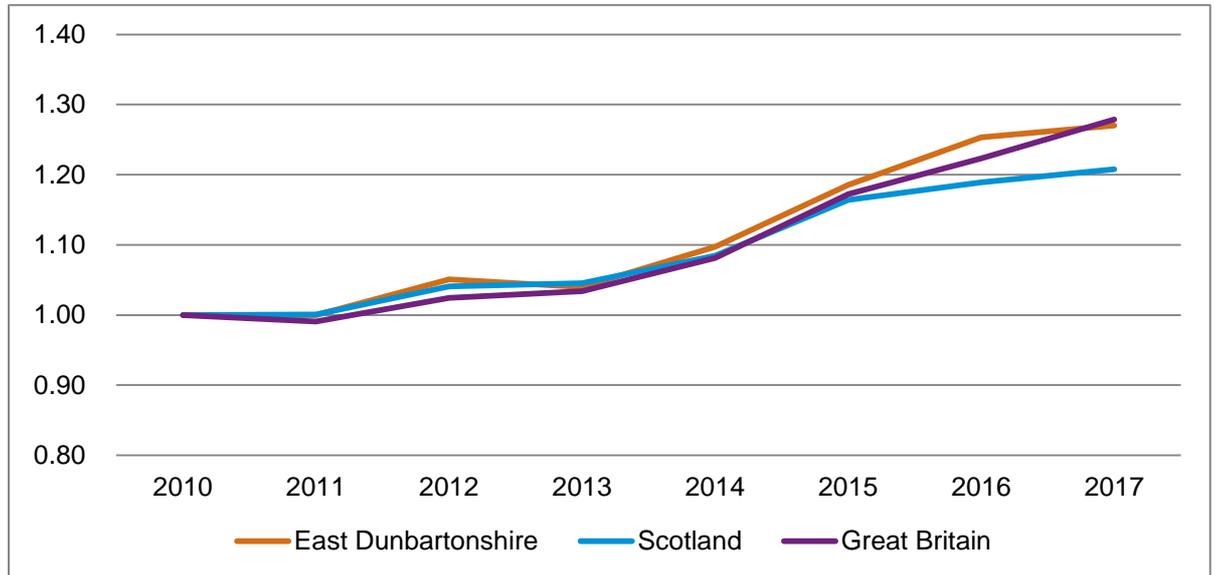
Figure 6: Enterprises by employment size, 2017



Source: Business Counts 2017

3.28 Since 2010, there has been an increase of 27% in enterprises volume in East Dunbartonshire. The equivalent for Scotland is 21% and Great Britain 28%. The figure below shows the trends over that last seven years (the period for which data was available).

Figure 7: Business Growth 2010-2017



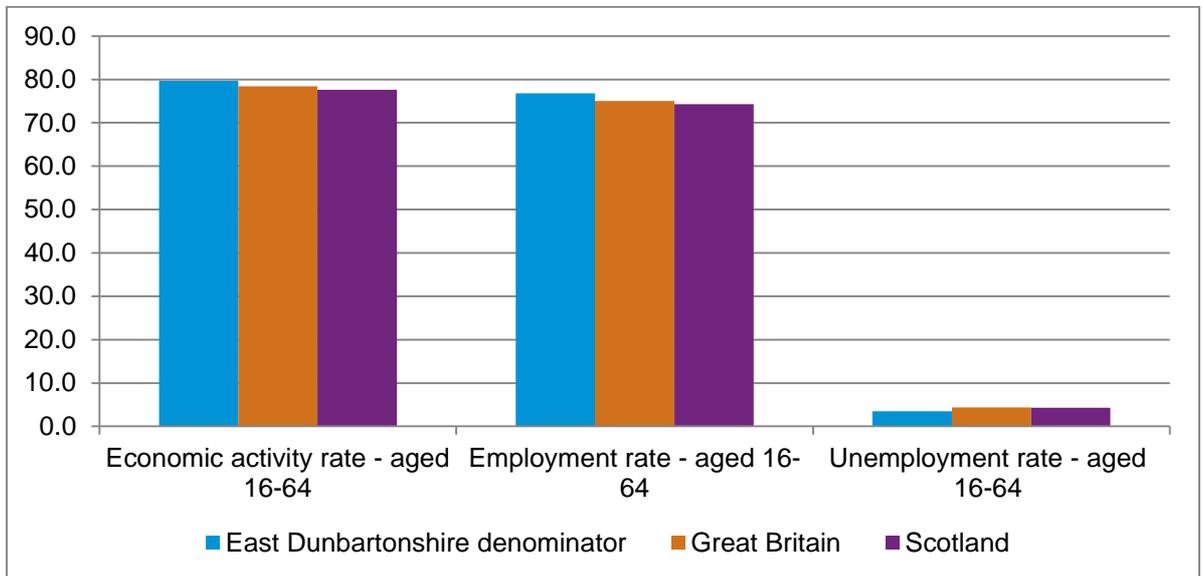
Source: Business Counts 2017

Labour market

Economic participation

- 3.29 Figure 8 shows economic activity, employment and unemployment as a percentage of the working age population (defined by ONS to be the population aged 16-64 years).
- 3.30 The figure shows that the employment rate in East Dunbartonshire is 76.8%. This is in line with, albeit slightly above, the wider comparators of Scotland (74.3%) and Great Britain (75%).
- 3.31 The Economic Activity Rate describes the percentage of working-age adults (16-64) who are working or looking for work. The Economic Activity Rate in East Dunbartonshire is 79.7% which is again above the other comparators.
- 3.32 Finally, unemployment within East Dunbartonshire (3.5%) is below that seen in Scotland (4.4%) and Great Britain (4.3%).

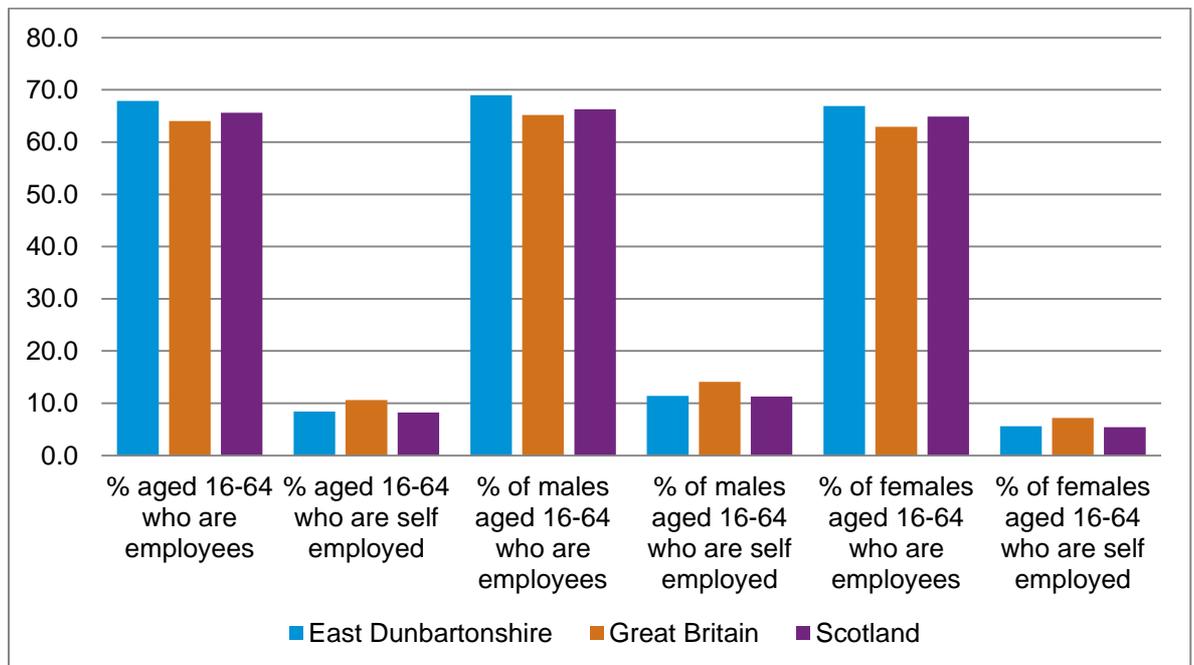
Figure 8: Economic activity rates (March 2018)



Source: Annual Population Survey (2018)

3.33 The level of self-employment in East Dunbartonshire (8.4%) is similar to that in Scotland (8.2%) and below Great Britain’s equivalent of 10.6%. There is a particularly low percentage of self-employee females in both Scotland (5.4%) and East Dunbartonshire (5.2%) compared to Great Britain (7.2%).

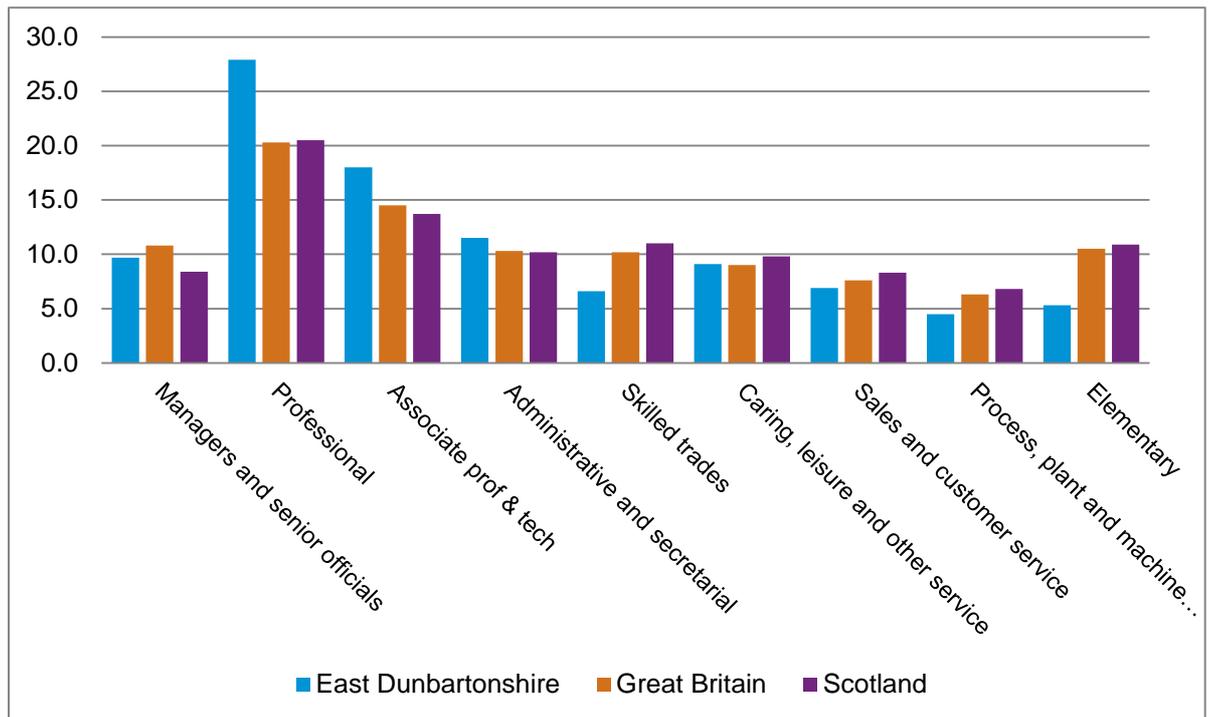
Figure 9: Employment by Type (2018)



Source: Annual Population Survey (2016)

3.34 Finally, we have sought to assess the occupational distribution of employment. The figure below shows that there is a high percentage of professionals in East Dunbartonshire. East Dunbartonshire has high representation across the top four occupational categories and lower representation in the bottom five. This reflects a highly skilled labour supply.

Figure 10: Employment by occupation 2018



Source: Annual Population Survey (2016)

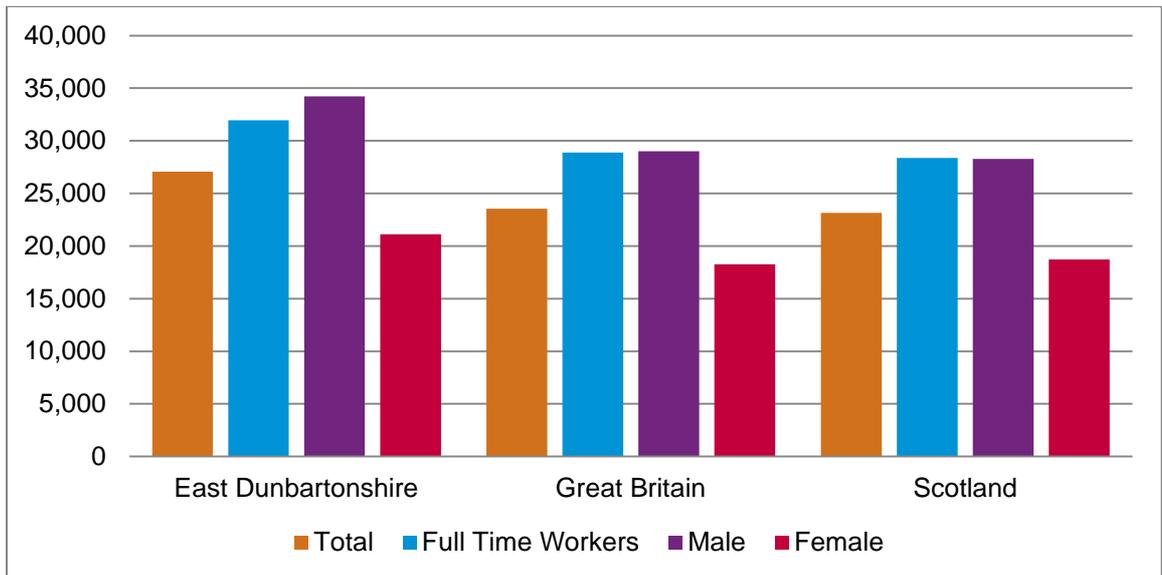
Earnings

3.35 East Dunbartonshire’s residents in full-time employment earn a median gross annual pay of around £27,000. This is higher than the median for Scotland (£23,200) and Great Britain (£23,600 per annum).

3.36 GL Hearn use median values in preference to mean values for earnings data. This is because median values are less influenced by extreme values and because of the skewed distribution of earnings data.

3.37 The median gross annual pay of people working full-time in East Dunbartonshire is higher, at around £32,000, than the equivalents for Scotland (£28,400) and Great Britain (£28,900 per annum).

Figure 11: Earning, 2017



Source: Annual survey of hours and earnings

Summary points

3.38 The findings herein are summarised below:

- East Dunbartonshire's economy produces goods and services valued at £1.56 billion per annum⁵(GVA).
- The strongest contributors to GVA in the area are public sector, including education and health, together with distribution, transport and food and accommodation.
- East Dunbartonshire has seen a moderate growth in GVA since 1998 with an increase of 71% against Scotland's equivalent of 90%.
- In terms of employment there are 27,000 jobs currently in East Dunbartonshire. Since 2009 there has been a growth of 11% or 1.5% per annum.
- East Dunbartonshire's largest employment sectors in terms of total employment numbers are Health (4,000 jobs), followed by Retail (3,500) and Education (3,000). Arts, entertainment, recreation and other services contribute to the structure by 2,250 jobs while Public Administration and defence contribute by 2,000.
- These top five sectors represent 55% of the employment in East Dunbartonshire. Some sectors, including Health, have high concentrations in the area. The Motor Trades sector also has high representation in the area compared to national figures.
- Over the last 7 years, public administration & defence (60%); arts & recreation (50%) and professional scientific and technical (40%) are the sectors which have seen the highest increases in employment.
- A total of 3,010 businesses are currently active in East Dunbartonshire with 91% being micro businesses. Since 2010, there has been an increase of 27% in the volume of enterprises in East Dunbartonshire, which is higher than that seen in Scotland.
- The employment rate in East Dunbartonshire is 76.8%, which is in line with the wider comparators. The Economic Activity Rate in East Dunbartonshire is 79.7%, which is above the wider comparators. Unemployment within East Dunbartonshire (3.5%) is below that seen in Scotland (4.4%) and Great Britain (4.3%).

⁵ ONS estimates of Balanced Gross Value Added, in current basic prices, allocated to local authorities in the UK in 2016

- East Dunbartonshire's residents in full-time employment earn a median gross annual pay of circa £27,000. This is higher than the median for Scotland (£23,200) and Great Britain (£23,600 per annum).

4 PROPERTY MARKET REVIEW

4.1 We present herein the commercial property market review, looking at recent transactions, values and availability across the Council Area. This is drawn from CoStar, which is the most recognised and commercially popular database across the UK. This analysis provides an indication of market demand. A detailed market report is attached in **Appendix A**.

4.2 East Dunbartonshire falls within Glasgow's commercial market. Initially we present an overview for the Glasgow market and its recent activity, followed by local commercial activity in East Dunbartonshire.

Greater Glasgow Market Overview

4.3 Glasgow has a significant industrial property market as Scotland's largest urban area with good accessibility to the M8, M80, and M74 motorways. Key industrial estates include Eurocentral and Hillington Park with the latter being Scotland's largest industrial and business estate.

4.4 Changing consumer spending patterns have led to strong warehouse demand from both retailers and parcel delivery firms recently. However, new development has been extremely limited, driving the vacancy rate below its 2012 peak.

4.5 Net absorption in the logistics subsector has been particularly strong, fuelled by the growth of e-commerce. Indeed, demand from retailers and logistic firms have helped to offset more subdued demand elsewhere. Lidl's move to Titan at Eurocentral in 17Q1 is one of many examples.

4.6 Demand has also been supported by deals for smaller and older warehouses from a range of sectors, including some leisure occupiers taking them for non-traditional uses. Net absorption has been particularly strong in North Lanarkshire over the last 12 months⁶.

4.7 Average rents remain on an upward path, although growth has been flat recently. Average asking rent for industrial space in Glasgow is £5/SF. This is lower than in Edinburgh (£5.50/SF), however, the picture changes when building quality is considered, with Glasgow's Grade A stock being more expensive.

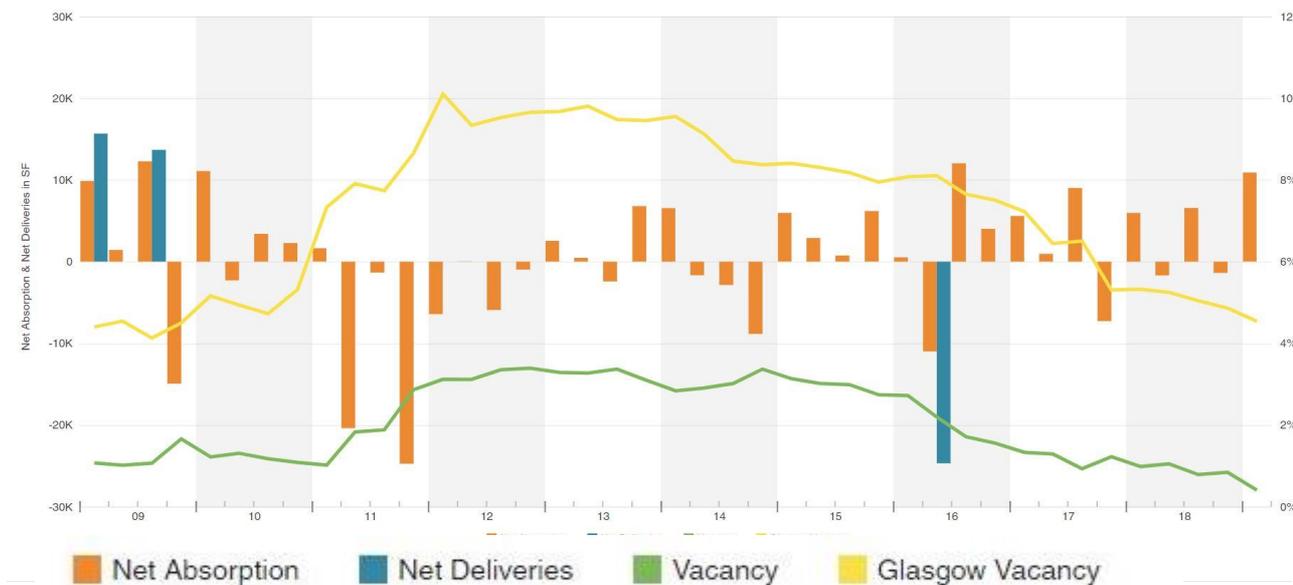
4.8 The investment market regained some momentum in 2017 as sales volumes comfortably outstripped those of the previous two years. Indeed, robust investor demand has fuelled strong yield compression in recent years, with average transaction yields falling to a 10-year low in 2017.

⁶ Russell Logistics' purchase of 5 Wardpark Road (264,000 SF) in 2017Q4 and BrewDog's purchase of Vertex (129,000 SF) in 2018Q2. Notable lettings recorded in the submarket during that time include DPD's lease of a new warehouse (70,000 SF) in 17Q4 and Wincanton's lease of Colossus 1 (96,000 SF) in 2018Q3

Dunbartonshire Market

- 4.9 CoStar has identified East/West Dunbartonshire as a unique submarket of Glasgow's Market. Herein we provide a detailed analysis of the market's activity.
- 4.10 In terms of availability, the current rate in Dunbartonshire is 2.2%, having decreased by 3.6% since last year – to put this in context, Glasgow's availability is higher at 8.3% (although this has also decreased but by just 1.2% since last year). In absolute figures a total of 171,000 sqft is currently advertised as available, with 151,000 being vacant.
- 4.11 Similar to availability rates, vacancy rates have fallen to 1.9% from 2.5% last year. Over the last ten years, the vacancy rate has fluctuated from 1.6% (Q2 2018) to 4.42% (Q2 2015). Since 2012 there has been a decrease in vacancy rates from 5.9% to 1.9% currently (Q3 2018).

Figure 12: Dunbartonshire Demand and Supply, 10 year trend



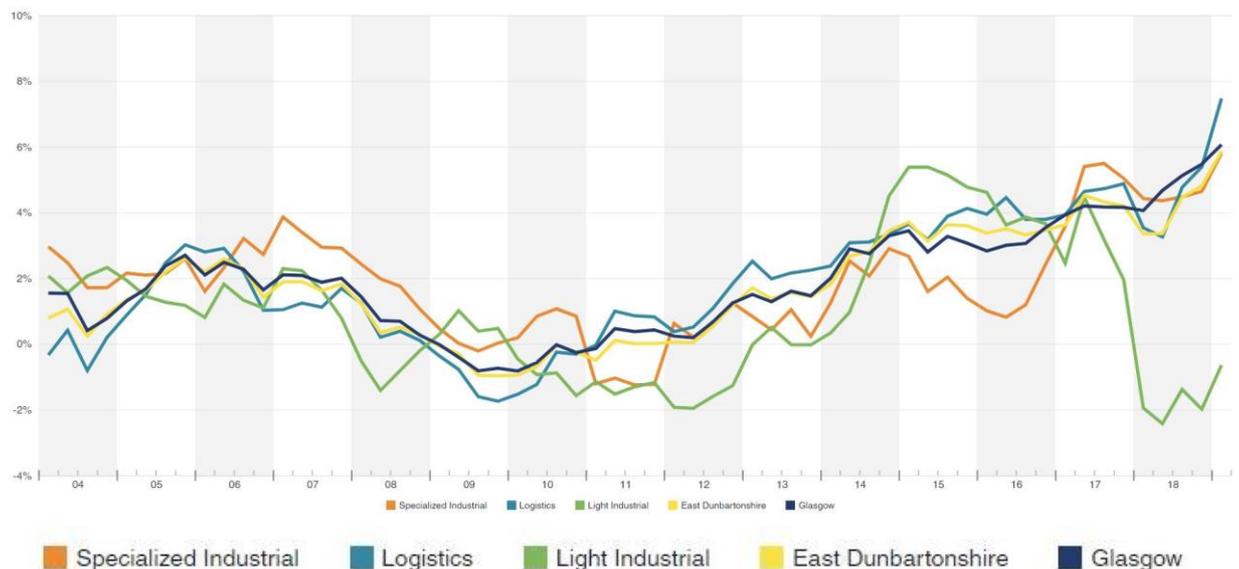
Source: CoStar 2018

- 4.12 Demand is estimated based on the net absorption⁷. Over the last 12 months the net absorption was 40,700 sqft. The market's probability of leasing is estimated by CoStar at 32.4%. As illustrated below, over the last 10 years net absorption varied between -118,200 sqft (Q3 2012) and 146,000 sqft (Q1 2010) with the average being at 23,800 sqft. Over the last year the net absorption has been negative at -15,500sqft reflecting more on the low delivery rates across the area that led to a decrease in occupancy rates in 2018.

⁷ For existing buildings, the measure of total square feet occupied (indicated as a Move-In) less the total space vacated (indicated as a Move-Out) over a given period of time. Lease renewals are not factored into net absorption. However, in a lease renewal that includes the leasing of additional space, that additional space is counted in net absorption. Pre-leasing of space in non-existing buildings (Planned, Under Construction or Under Renovation) is not counted in net absorption until actual move in, which by definition may not be any earlier than the delivery date.

4.13 In terms of sales, 7 properties have been sold over the last year at an average price of £64 per sqft. Market yield is at 7.1% showing a small decrease of 0.23% compared to last year. Sales volumes have also decreased from £2.5 million to £1.7 million over the same period. Rents currently stand at £4.67 per sqft having increased 20% over the last 10 years. However in absolute terms this increase relates to 0.67/sqft over the same period. Compared to Glasgow City Region this follows the same trends on a slightly lower rental values.

Figure 13: Rental Growth 2004-18



Source: CoStar 2018

Agency Consultation

4.14 East Dunbartonshire is one of eight local authority areas which sit within the Glasgow City Region, which is one of the largest city regions in the UK. Well-connected globally, with access to two international airports and nationally to extensive rail and road infrastructure, Glasgow City Region provides 33% of Scotland's jobs and is home to over 28% of Scottish businesses.

4.15 The region benefits from numerous assets including access to a highly skilled workforce of 1.2 million across a wide range of industries. Glasgow dominates the City Region and has existing strengths in a number of sectors including financial services, life sciences, engineering, manufacturing and creative and media industries.

4.16 The city is also home to a number of internationally acclaimed successful universities and research institutes that provide the space for innovation and the people who drive the region's development. Glasgow also is home to the majority of retail, cultural and tourism attractions.

- 4.17 Glasgow is Scotland's largest city and generated £43 billion GVA in 2016. It is a diverse and resilient economy; more than 54,000 companies (28% of Scottish companies) make their home in the Glasgow city region, supporting 844,000 jobs. Glasgow is also Scotland's number one city for foreign direct investment and has been named one of Europe's top ten large cities of the future. Noted for business friendliness and connectivity, Glasgow is fDi Magazine's runner up for FDI strategy (2018/19).
- 4.18 The city's has strong links throughout the UK and Europe, a competitive advantage with multi-sectoral expertise, excellent infrastructure and digital connectivity, a robust pipeline of talent and accommodation to suit any need. For businesses looking to expand, locate or invest in the Glasgow City Region the location of choice for the vast majority is the city of Glasgow.
- 4.19 As part of the City Deal there is significant investment (£1.13 billion) in improving local infrastructure. Although none of these investments are in East Dunbartonshire, wider improvements should ease the flow of traffic and goods between Glasgow and the Council area. In some cases the investments could result in employment being taken away from East Dunbartonshire.
- 4.20 Glasgow's success and its dominant role in the City Region provide challenges and opportunities to neighbouring local authorities, including East Dunbartonshire. East Dunbartonshire borders the north-west of the City of Glasgow and contains many of the suburbs of Glasgow, as well as many of the city's commuter towns and villages. The attractive environment and close proximity to Glasgow city centre makes East Dunbartonshire an extremely popular place to live.
- 4.21 However there is very little interest in East Dunbartonshire from office occupiers. Office rents within Glasgow are seen as being generally affordable for the majority of SMEs. In addition Glasgow offers them with excellent connectivity, access to markets and a readily available labour pool. Larger office occupiers seeking prime Grade A office space are very unlikely to consider anything outside Glasgow city centre.
- 4.22 For example, the recent announcement by Barclays to create a new state-of-the-art campus to be built at Buchanan Wharf will provide a state-of-the-art workplace for the bank's functions, technology and operations teams. It is expected that, once completed, the campus will be able to accommodate up to 2,500 additional roles, doubling Barclays' current workforce in Scotland and making the bank one of Glasgow's biggest commercial employers.

East Dunbartonshire Industries

- 4.23 Currently the main towns in East Dunbartonshire cater for the following industries:
- Bearsden- large modern site occupied by the Beatson Institute for Cancer Research- Cancer Research UK (rentals around £20/sqft pa)
 - Bishopbriggs- a collection of smaller scale industrial estates and a start-up incubator, “Huntershill Village”, with businesses occupying porta cabins. Bishopbriggs also accommodates manufacturing companies such as ICL tech (plastic engineering), stationary manufacturers and book publishers (rentals around £18/sqft pa). Westerhill provides some longstanding major employers such as Harper Collins and new blue-chip arrivals in the shape of Aviva.
 - Kirkintilloch provides a wider offer of industrial estates; major occupiers include Guala Closures Ltd (manufacturer of aluminium and non-refillable closures), North Sea Plastics (polythene and plastic sheeting supplier), FSL Fabrication Specialists (steel fabrication), Robeslee Concrete Co Ltd (Concrete Product Supplier); and is home to East Dunbartonshire’s council offices. (rentals average around £14/sqft pa)
 - Lennoxton includes a small, fully-occupied enterprise centre and a Highland Spring water factory.
 - Lenzie accommodates a variety of manufacturing companies at Woodilee Industrial Estate including PW Hall plastic fabrication (concreted yard available for £0.73/sqft pa)
 - Milngavie includes Crossveggate Business Park and Milngavie Enterprise Centre which cater for accounting services, tour operators, non-profit organisations and architects. Cloberfield industrial estate accommodates manufacturing such as Dieselec Thistle Generators Ltd, which specialise in generator manufacture, and Saica Pack paper mill. (rentals around £16/sqft pa)
 - Twechar has a small business park which includes uses such as a meat wholesaler, air compressor suppliers and a blind supplier.
- 4.24 There are currently no active requirements out for occupiers looking to locate in East Dunbartonshire. As part of this study we also speculatively spoke to a number of major occupiers currently operating in the outskirts of Glasgow in the research, construction and technology industries. None of the companies consulted would consider moving to East Dunbartonshire.
- 4.25 In part, this is due to there not being many occupiers out there looking for new or additional space in the Glasgow City Region as a whole. However East Dunbartonshire also suffers from being seen as being on the wrong side of the city. Businesses wanting access to Glasgow city centre for staff and markets prefer locations to the south.
- 4.26 Companies interviewed were also generally happy with their current locations which meet their requirements, were more interested in locations such as the new University of Glasgow Research Hub, or have long leases at existing locations.

Competition

- 4.27 Locations like Hillington are much more accessible to the city centre, as well as being affordable for small and larger companies. Hillington Park currently offers office units available on short, medium and longer term let from around £14 per square foot. These offer flexibility and affordability for

small businesses near to Glasgow and also to the main motorway network. It is unlikely that East Dunbartonshire is going to be able to compete in this market and instead may want to focus on niche or targeted office markets.

- 4.28 East Dunbartonshire is also at a competitive disadvantage for businesses that want easy access to Edinburgh and Glasgow. Businesses are more likely to target locations like Stepps or Livingston. For example, Buchanan Park at Stepps is located approximately 7 miles north-east of Glasgow City Centre on the A80, which lies adjacent to the M8 motorway. Prices here range from £9 to £15 per square foot.
- 4.29 East Dunbartonshire is not seen as being an attractive location for 'clean' businesses such as call centres as the workforces of such companies generally prefer easy access to city centre amenities and public transport hubs. East Dunbartonshire is more likely to be attractive to haulage and distribution businesses with a national reach because of its relatively good access to the M74.
- 4.30 East Dunbartonshire has regularly been recognised as an area which offers a high quality of life due to its good quality environment, access to open spaces. It also has high employment rates, owner occupancy rates, generally good health statistics and high educational attainment. These factors have helped to drive a strong housing market.
- 4.31 As the way we work changes and evolves there may be opportunities for East Dunbartonshire to develop small business spaces and homeworking hubs.
- 4.32 Businesses seeking out-of-town locations will focus on the following locations in the wider Glasgow area:
- Hamilton International Technology Park
 - Strathclyde Business Park
 - Maxim Office Park, Eurocentral
- 4.33 Maxim Office Park Eurocentral still has 400,000 sqft of availability and is an enterprise zone, therefore they are offering aggressive incentives to companies considering locating there.
- 4.34 The M80 improvements have increased connectivity across the area but a lot of this activity will be focussed around the industrial parks and film studios in Cumbernauld as well as the Nova Business Park in Robroyston, all of which sit out with the East Dunbartonshire boundary.

Summary Points

- 4.35 The key points derived from the market assessment include:
- Availability has decreased recently reaching a rate of 2.2%. The total available floorspace is currently 171,000 sqft across both East and West Dunbartonshire

- The vacancy rate across East and West Dunbartonshire at 1.9% is one of the lowest seen in the area over the last 10 years;
- Demand in East and West Dunbartonshire in terms of net absorption is negative at -15,500sqft, driven by the constrained supply that affected the occupancy rates in the area.
- Rents in East and West Dunbartonshire have increased over the last 10 years by 20%, reaching £4.67 per sqft.

4.36 Overall the market in East Dunbartonshire appears buoyant as indicated by low vacancy rates and increasing rents. However, the area is at a competitive disadvantage to other areas surrounding Glasgow which have better strategic access.

4.37 As a result East Dunbartonshire may not be able to attract large scale inwards investment without providing a package to potential investors. However, the area will still generate indigenous growth as the local population is highly qualified and may wish to establish and grow their own businesses.

5 BUSINESS SURVEY

Introduction

5.1 GL Hearn devised and facilitated two surveys to gather information regarding the market opportunities and constraints for the employment land supply in East Dunbartonshire. We firstly surveyed local (East Dunbartonshire) businesses to understand their growth ambition and requirements.

5.2 We also undertook a second survey of businesses located outside of East Dunbartonshire to ascertain whether they had any interest in re-locating to East Dunbartonshire and, if not, why not. These surveys took place during October 2018.

Current Businesses

5.3 From a total of 204 active businesses in East Dunbartonshire identified, only thirteen agreed to take part in the survey. This included six major occupiers and seven small businesses. Of the businesses that responded, the majority benefited from high to medium quality of locations and facilities. Respondents were from across the Council area but the largest numbers were from Milngavie and Kirkintilloch

5.4 77% of the thirteen businesses surveyed confirmed that their current business space adequately accommodates their business need. All of the businesses that were unsatisfied with their current space had plans to upgrade and expand their premises in the near future. This demonstrates that there will be a need for move-on space and better quality space in East Dunbartonshire.

5.5 Whether businesses wanted to move or not the majority of businesses had ideas of improvement works which would benefit their premises. The ideas suggested included:

- Floorspace alterations;
- Building condition improvements;
- Access enhancement including car parking spaces; and
- Environmental improvements.

5.6 Clearly only some of these improvements are within the Council's powers but the suggestions do indicate that better quality business locations with ample parking could receive a level of interest.

5.7 Opinion was mixed regarding their business re-locating premises, with approximately 46% of business stating that they would consider moving from their current premises for the following 'driving' reasons:

- Cost;
- Space;
- Convenience; and
- Location.

- 5.8 This suggests a need for well-located premises (near town centres or transport hubs) at reasonable rents, and that such provision could achieve a level of interest and help retain some the existing employers. It is notable that, overwhelmingly, nearly 85% of respondents stated that their needs could be accommodated within East Dunbartonshire.
- 5.9 In terms of what EDC could do to encourage growth in the businesses' respective sector, two responding businesses suggested that business rates could be lowered, whilst other businesses cited business park investment.
- 5.10 Other potential interventions suggested include: an increase in the supply of commercial units; improved education and training support for ensuring an available and suitably qualified workforce; and financial support for local suppliers.
- 5.11 Generally, businesses stated concerns regarding the state of the local economy of East Dunbartonshire (approximately 70%) and mentioned the following challenges: the requirements for infrastructure improvement; retail unit occupation rates within Kirkintilloch Town Centre; the impacts arising from Brexit; and the growth in internet based business activity.

Potential Business Survey

- 5.12 In addition to the survey of current East Dunbartonshire businesses, we sought the views of businesses located outside of EDC to understand the appeal or otherwise of East Dunbartonshire as a potential future location for their business.
- 5.13 A total of fifteen businesses were identified from the target sectors currently located within the greater Glasgow area. However, only four businesses were willing to participate in the survey, none of whom had any active premises requirements.
- 5.10 One business did express some potential future plans to improve or expand on their business premises. However, this was unlikely to be in East Dunbartonshire. The businesses cited the reasons for their lack of interest in East Dunbartonshire as either not being their preferred location or not meeting their locational requirements i.e. either central Glasgow or near the University.
- 5.11 The surveyed businesses were not forthcoming with suggestions for EDC to encourage growth in their respective sectors. However, one business did suggest that EDC could assist by allowing advertising for businesses via local government networks.

Summary

- 5.12 In summary, whilst the majority of businesses surveyed within East Dunbartonshire were satisfied with their current accommodation, the East Dunbartonshire survey does provide useful details regarding potential required premise improvement works and likely re-location driving factors for the businesses.
- 5.13 Positively, the survey found that East Dunbartonshire is seen to be able to sufficiently accommodate the business community's needs for the short-medium term future. The participants also provided some helpful suggestions for ways in which EDC could support and promote growth of the businesses' sectors. However, there remain some concerns regarding the general state of the local economy of East Dunbartonshire.
- 5.14 In terms of the Potential Business Survey, whilst the sample size was small, there did not appear to be an appetite from the businesses surveyed for the potential re-location of their premises to East Dunbartonshire for pre-dominantly geographic reasons. This justifies the fairly conservative level of employment growth forecast and to be planned for.
- 5.15 In terms of accommodating that growth and supporting additional growth the survey respondents suggest that additional, good quality but reasonably priced employment floorspace in accessible, central locations would be welcome. This could also be achieved by improving the quality of the existing stock.

6 AUDIT OF EMPLOYMENT SITES

6.1 This section of the report provides a review of the existing and potential employment land in East Dunbartonshire. The employment sites subject to assessment were provided by East Dunbartonshire Council, and include the main employment locations within the area. Site surveys were undertaken by GL Hearn in September 2018 using a site assessment pro forma and GIS mapping software including the “collector” app which draws on best practice guidance. The site assessments addressed:

- The nature and intensity of use of the employment site;
- Road access, including access by HGVs and servicing of existing businesses;
- Access to local services/amenities for employees;
- Physical constraints to the development and use of the site;
- Nature of any bad neighbour or adjacency issues;
- The age and quality of existing buildings; and
- Public transport accessibility and adequacy of parking provision.

6.2 A general description of each employment site was prepared. The site survey included specific consideration of the quality of sites and floorspace and their future suitability to meet market demand.

6.3 This section of the report reviews the development potential of sites, opportunities for intensification of use and potential for extension of existing sites. Vacant land and floorspace on existing sites has been recorded. Where development opportunities were identified, information was collected regarding the potential availability of land for development, market attractiveness of the site, and any known constraints (including infrastructure) which might impact upon the deliverability of development.

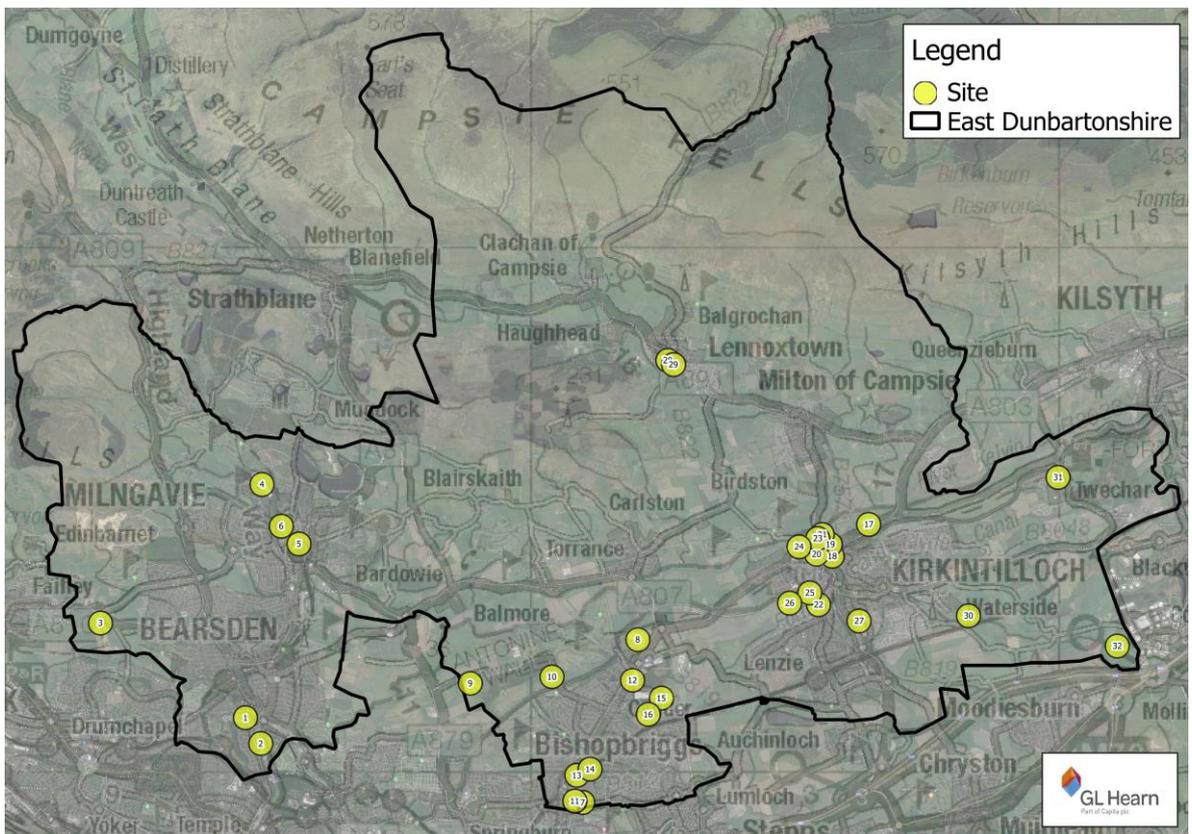
6.4 The assessments come with the caveat that neither a detailed investigation of land ownership and lease structures nor detailed development appraisals to assess viability at a site-specific level (in the absence of a development scheme) have been undertaken to inform conclusions on development potential. GL Hearn advises that the Council liaise with landowners and developers to consider these issues in detail to inform any future site allocations.

Sites Considered

6.5 The Table below outlines the sites which have been assessed through this Economic Needs Assessment Update. These sites are mostly allocated for business and employment in the East Dunbartonshire Local Development Plan and the relevant reference numbers are provided in the Table. In total, these sites covered approximately 215 hectares. These sites were visited on 14th and 17th September 2018.

6.6 Two further sites (lower Kilmardinny and PFS on Kirkintilloch Road) were also assessed, but on inspection, had been converted to residential uses). We have also assessed the Springfield House site in Bishopbriggs, although this is not being retained for employment uses.

Figure 14: Location of existing and potential employment sites reviewed



Source: GL Hearn, 2018

6.7 What follows is a summary of the site assessments undertaken in late 2018. The site assessments identified site attributes including transport links, vacancy rates, age and quality of built stock.

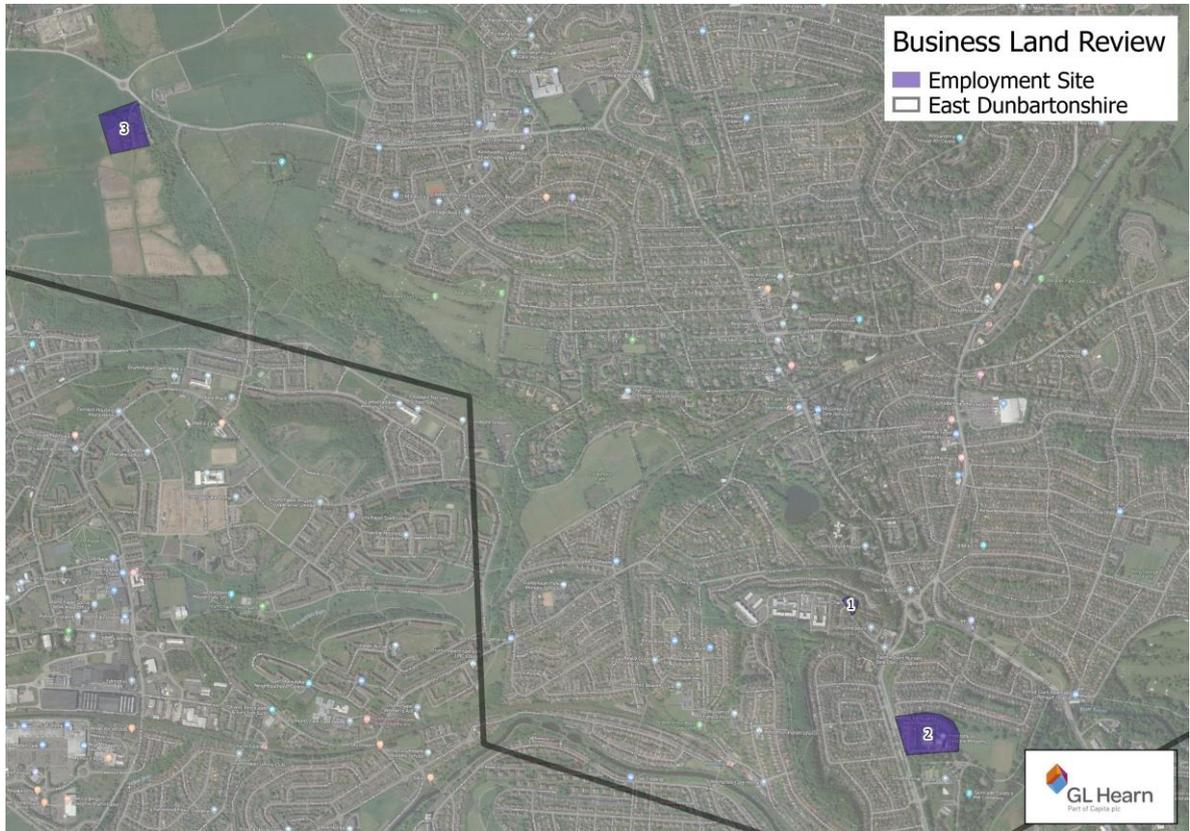
6.8 The site assessments also identified areas which had the potential to host additional employment generating uses. This includes vacant areas, derelict buildings, sites which could be intensified etc. The areas identified as suitable for employment generating uses were measured and quantified using GIS.

Table 3: List of Existing and Potential Employment Sites Reviewed

Site Ref	Site Name and LDP Ref	Site Classification
Bearsden		
1	Canniesburn Gate (LDP 13.1)	Fully developed Emp. site
2	Garscube Estate (LDP 13.5)	Developed Emp. site, with vacant land
3	Garscadden Depot (LDP 13.4)	Vacant former civic amenity site
Milngavie		
4	Cloberfield Industrial Estate (LDP 13.2)	Developed Emp. site, with vacant land
5	Crossveggate Business Park (LDP 13.3)	Fully developed Emp. site
6	Milngavie Enterprise Centre (LDP 13.7)	Fully developed Emp. site
Bishopbriggs		
7	Bishopbriggs Industrial Estate (LDP 13.15)	Partly developed Emp. site, with vacant land
8	Cadder Works (LDP 13.10)	Single occupier site, fully developed
9	Former Balmuildy Brickworks (LDP 13.12)	Single occupier site, fully developed
10	Hilton Depot (LDP 13.14)	Fully developed Emp. site
11	Huntershill Village (LDP 13.8 and 13.9)	Developed Emp. site with potential for more permanent buildings
12	Low Moss Industrial Estate (13.15)	Developed Emp. site, with vacant land
13	Springfield House, St Mungo Street	Developed Emp. site, with vacant land
14	Springfield Works (LDP 13.11)	Fully developed Emp. site
15	Westerhill Business Park North (LDP 13.17)	Developed Emp. site, with vacant land
16	Westerhill Business Park South (LDP 13.17)	Vacant land
Kirkintilloch & Lenzie		
17	Broomhill Industrial Estate (LDP 13.18)	Fully developed Emp. site
18	Canal Street Industrial Estate (LDP 13.20)	Fully developed Emp. site
19	Eastside Industrial Estate (LDP 13.22)	Fully developed Emp. site
20	High Street Industrial Estate (LDP 13.21)	Fully developed Emp. site
21	Kirkintilloch Industrial Estate East (LDP 13.24)	Fully developed Emp. site, small area of vacant land
22	Lower Whitegates (LDP 13.31)	Partly developed Emp. site, with vacant land
23	Milton Rd (Kirkintilloch IE West) (LDP 13.25)	Partly developed Emp. site, with vacant land
24	Ramsay Industrial Estate (LDP 13.28 and 13.26)	Fully developed Emp. site
25	Southbank Business Park (LDP 13.29)	Fully developed Emp. site
26	Southbank Works West (LDP 13.29)	Developed Emp. site, with vacant land
27	Woodilee Industrial Estate (LDP 13.23)	Partly developed Emp. site, with vacant land
Lennoxton		
28	Lennoxton Enterprise Centre (LDP 13.32)	Fully developed Emp. site
29	Veitch Place (Highland Spring) (LDP 13.32)	Fully developed Emp. site
Twechar and West		
30	Pit Road, Waterside (LDP 13.27)	Developed Emp. site
31	Twechar Business Park (LDP 13.30)	Fully developed Emp. site
32	Badenheath (LDP 13.19)	Greenfield

Bearsden

Figure 15: Bearsden Sites



Site 1 - Canniesburn Gate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
0.2	0ha	N/A



6.9 The 0.2 Ha site is located north of Canniesburn Drive, south-east of Bearsden. Canniesburn is a small employment site located on the eastern boundary of the established Canniesburn employment area. The site is within the settlement boundary of Bearsden and surrounded by residential uses to the north, south, east and west.

- 6.10 The site currently comprises an office building and associated parking, which are in relatively good condition. The site accommodates a single occupier, Golden Charter, a funeral plan business.
- 6.11 Currently, the site is accessible via Canniesburn Drive which is a relatively narrow road that provides direct access to the A739. Access to the A739 provides strong north-south connections to local markets in Bearsden and wider regional markets via the strategic road network. There is limited public transport accessibility with the closest bus stop 0.2 miles from the site on Switchback Road.
- 6.12 The internal road network appears sufficient for existing occupiers however, heavy vehicles may have difficulty accessing the site due to the narrow road (such as on street parking issues) and a sloped downhill access into the site.
- 6.13 The site is fully developed with no vacant land available and is surrounded by residential dwellings so there is no scope for further development on the site.
- 6.14 **Conclusion: Canniesburn is an active, well maintained employment site that relies on its location for strong access to the markets it serves. There are no opportunities for intensification on the site. The employment use at the site should be protected.**

Site 2- Garscube Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
3.11	0.19 0.09	Intensification Opportunity Vacant Brownfield



6.15 Garscube Estate is a 3.11 Ha site comprising of a dedicated research facility, located on the south-eastern outskirts of Bearsden, on the north-west outskirts of Glasgow. The site is located in close proximity to The University of Glasgow’s small animal hospital which sits to the south and the University of Glasgow’s Veterinary School, located 500m to the south.

- 6.16 The site is bounded to the east by playing fields, and by residential uses to the north and west. Barrier controlled entry restricts access to the site. The site is bounded to the west by the A739 (Switchback Road) and access to the site is directly from this road (shared access with the Small Animal Hospital).
- 6.17 The controlled barrier access is inside the site. The site is considered highly accessible due to its proximity to the A739. There is good public transport accessibility with the closest bus stop located directly outside the site on Switchback Road and four bus services available from the stop.
- 6.18 Westerton train station is located to the west of the site (a 15 minute walk) which operates direct services to Airdrie, Milngavie, Dalmuir, Larkhall, Balloch, Motherwell, Edinburgh and Glasgow. Overall, the site is considered highly accessible, due to its highways and public transport connections.
- 6.19 The site presents an opportunity for the expansion of research facilities at the Beatson Institute. There is an opportunity for the site to capitalise on the strong transport links and proximity to surrounding institutions and employment land, which create a specialised cluster. The former stable blocks to the west of the site and an area of hardstand north-east of the site present opportunities for employment development, particularly to support the growing research sector. These buildings are not listed and the site is not located within a conservation area.
- 6.20 **Conclusion: The site is strategically located, within proximity to the A739 and neighbouring research facilities, making it an attractive location for institution and research uses. The site would provide a natural expansion to the existing employment area. The vacant sites around the Beatson Institute for Cancer should be considered within the employment land supply, although the nature of the site would suggest that this is only for the institute itself.**

Site 3 - Garscadden Depot



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
3.2	3.2	Vacant Brownfield



6.21 Garscadden Depot is a 3.2 Ha Landfill site. It is a former Civic Amenity site located in open countryside to the west of Bearsden. The site is bounded to the north-east by the A810 and Windyhill Power Station is located north of the site.

- 6.22 The site comprises of a mix of derelict sheds which are screened from view from the main road by dense vegetation along the periphery of the site. The site is no longer in use and access is currently not permitted. The site is subject to constraints, including contaminated land as a result of the former use and potential flooding impacts from the water course that travels direct east of the site.
- 6.23 The site is accessible via the A810, which connects the site to local and regional markets in the east and west.
- 6.24 Any form of development will require the delivery of supporting utilities infrastructure and upgrade to the existing access road from the A810. Development will need to be configured with the consideration of environmental constraints.
- 6.25 **Conclusion: The brownfield site is in a commercially attractive location due to its proximity to the A810. There is an opportunity for the site to operate as its former use and provide facilities for waste or bad neighbour uses should there be demand, given access to the markets these uses serve via the strategic road network. It is therefore recommended that the vacant site is included within the employment land supply.**

Milngavie



Site 4 - Cloberfield Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
11.2	0.52 0.31	Intensification Opportunity Vacant Brownfield



- 6.26 Cloberfield Industrial Estate is a well-established industrial location to the north-west of Milngavie town centre. It is the largest industrial location in the western half of East Dunbartonshire.
- 6.27 Cloberfield and Clober Road run along the western side of the site, which is also where the main site entrance is located.. To the east of the site is Allander Water and the West Highland Way so there is no scope for expansion as Woodland lies to the immediate south and north of the site.
- 6.28 The main access into the site is Bleachfield which runs off Cloberfield. There is poor internal circulation, in part due to the configuration of the units. There are dedicated car parking spaces associated with some of the units.
- 6.29 There is a range of small to medium sized buildings which are all in relatively good condition. There are a wide range of businesses located at the site including:
- Saica Pack
 - Scott Plumbing
 - Deselec Generators
 - Les Weir Garage
 - Murray Packaging
- 6.30 **Conclusion: There is an opportunity for intensification in the north-west of the site. The close proximity of Allander Water which could suggests that there may be a flood risk. There is also a derelict site that could brought back into employment-making industrial use. The remainder of the site should be retained as a key industrial location.**

Site 5 - Crossveggate Business Park



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
0.54		



6.31 Crossveggate Business Park is a small business park sitting in the centre of Milngavie.

- 6.32 A railway line runs along the entire western side of the site. The bowling club lies immediately to the east, as does the A81 Glasgow Road which provides the site with good accessibility.
- 6.33 The business park consists of a small number of local businesses in low rise buildings which are all in relatively good condition. Overall the business park has an attractive appearance with green space interspersed with business units.
- 6.34 The main access into the site is along Crossveggate Road which runs off the A81. There is good internal circulation, in part due to the configuration of the units. There are dedicated car parking spaces associated with the units. Milngavie Railway Station is in close walking distance of the business park.
- 6.35 There are a range of businesses located at the site: Non-business uses in the park include a Pilates studio, Businesses include:
- En Gargae Ltd
 - GM Thomson Architect
 - S Sim funeral Director
 - Alan Dougal Roofing
- 6.36 **Conclusion: Crossveggate Business Park is fully developed and there is no room for expansion. The business park is made of local businesses and is fully let. The site should be supported for continued employment uses.**

Site 6 - Milngavie Enterprise Centre



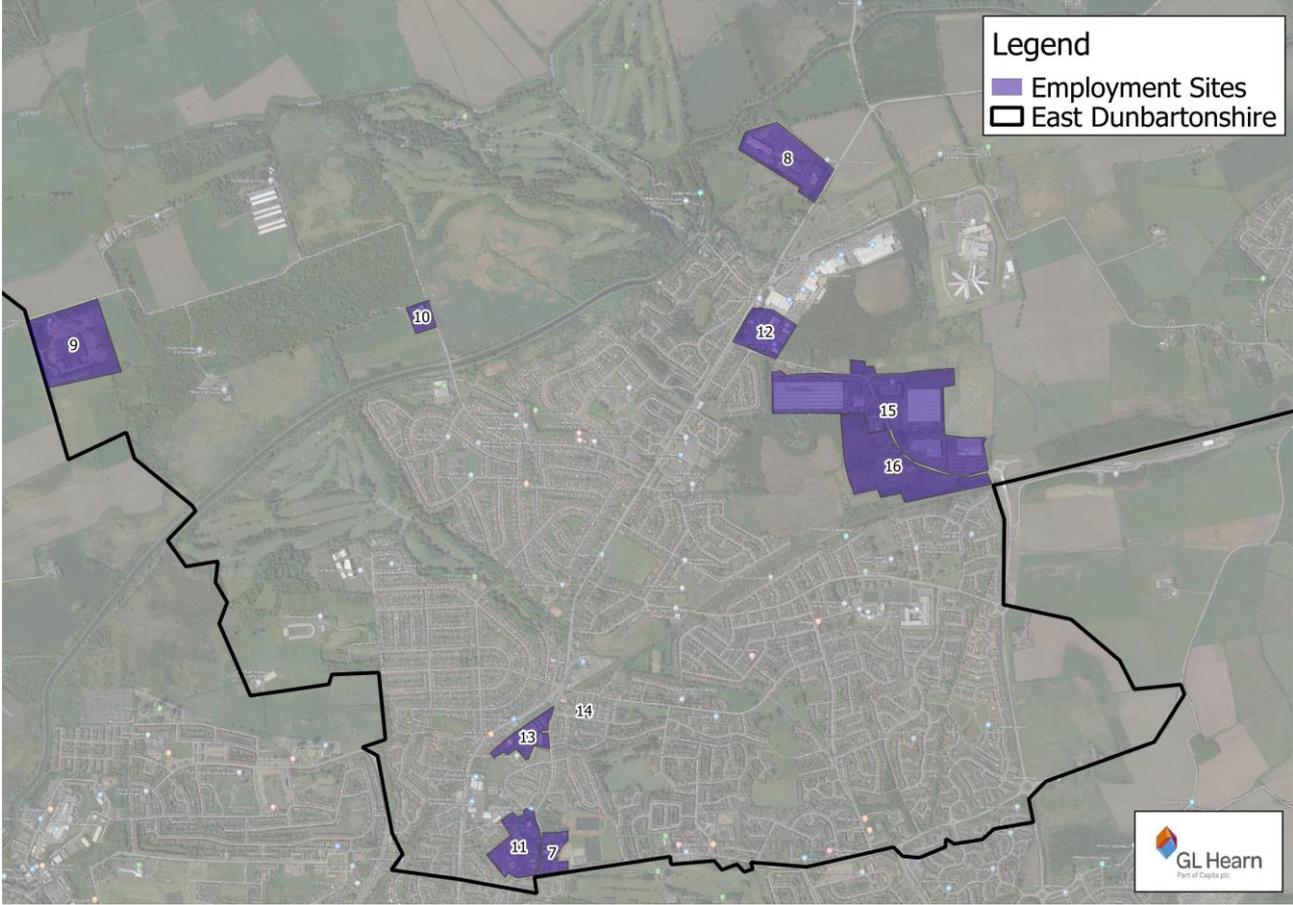
Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
0.2		



6.37 Milngavie Enterprise Centre is a small business park sitting in the centre of Milngavie.

- 6.38 Woodland and the West Highland Way provide the western boundary to the site. To the south is a large car park, and to the north residential.
- 6.39 The business park consists of a modern single unit building which appears to be in excellent condition. There are two accesses into the site; to the south from Ellangowan Road and to the north from Ellangowan Court. Overall, the business park has an attractive appearance with a decent amount of green space.
- 6.40 There is good internal circulation and there are dedicated car parking spaces associated with the units. Milngavie Railway Station is within walking distance of the business park.
- 6.41 There are a range of businesses located at the site: Businesses include:
- Graham Decor
 - DMB Accounting
 - Carers Link
 - Richmond Fellowship
- 6.42 The building is currently fully let and it is understood that a waiting list exists for new tenants.
- 6.43 **Conclusion: Milngavie Enterprise Centre is fully let and there is no room for expansion on the site. It is recommended that encouragement should be given to helping to create further enterprise centres where opportunities exist in appropriate locations.**

Bishopbriggs



Site 7 - Bishopbriggs Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.4h	0.43	Brownfield Vacant
	0.21	Brownfield Vacant



6.44 Bishopbriggs Industrial Estate is a 1.4 Ha local industrial estate, located in the south of Bishopbriggs. The site is bounded to the south by the B812, playing fields to the east and

residential uses to the south. A small area of woodland lies to the north. Huntershill Village, is located directly west of the site.

- 6.45 The site has various access points, including the B812 to the south, Crowhill Road to the West and Huntershill Way to the north. The nearest bus stops are located on Auchinairn Road to the South, which operate routes to Glasgow, widening the labour catchment. In consideration of this, the site can be seen to have reasonable levels of accessibility.
- 6.46 The developed parts of the site comprise a series of mid-sized industrial units of medium to poor quality. These units currently accommodate auto repair shops, a bakery, an elevator company and building companies. Occupiers include Ross Autos, Briggs Vehicles, Hart Lifts, Littlehill Motors, Scotlink Developments, Bishopbriggs Coachworks Ltd and Patisserie Françoise.
- 6.47 The site has reasonable internal circulation, although on visiting the site many cars were parked on the sides of roads and on pavements, which indicates that parking provision for the existing users is inadequate. Grass areas and signage is generally well-maintained but improvements to pavements and roads are required.
- 6.48 The car parking areas in the site are required for occupiers so there is little opportunities for further employment development in these areas. However, there is a cleared vacant site to the north of the industrial park with potential for a further industrial unit.
- 6.49 **Conclusion: This is an established, local employment site but improvements are required to continue the attractiveness of this location. It is recommended that the vacant site to the north is included within the employment land supply. The vacant site to the south is currently under construction.**

Site 8 - Cadder Works



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
6.8	-	-



6.50 Cadder Works is a large-scale tile manufacturing site located on the north-eastern edge of Bishopbriggs. It is occupied by Marley Eternit. The surrounding area includes farmland to the north and east and Kier Golf Course to the west. Cadder cemetery is located to the south with

Strathkelvin Retail Park further afield to the south. The site is located in close proximity to the residential area of Cadder to the south-west.

- 6.51 The site is accessed directly from the A803 to the south. There is a bus stop directly outside the site located on Kirkintilloch Road, servicing routes to Kilsyth, Torrance, Lennoxton and Glasgow. Overall, the site is considered to have very good levels of accessibility.
- 6.52 The site is a single occupier site; currently operated as a tile manufacturer. The site comprises one large warehouse building to the west, a large storage area to the north, lorry parking areas and a collection of smaller warehouses and office buildings with ancillary car parking to the front, facing Kirkintilloch Road. The site is well-maintained and the buildings are modern, and of a high design quality. The site has efficient internal circulation, and good connectivity to surrounding industrial uses.
- 6.53 The site is fully built out, and there are no opportunities for further expansion or intensification.
- 6.54 **Conclusion: This is a well-functioning single occupier site, with good connectivity. The site is fully built out and any further expansion depends on the current occupiers. No specific policy response is required, although if the site wishes to expand there is likely to be capacity within neighbouring plots to do so.**

Site 9 - Former Balmuildy Brickworks



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
11.5	-	-



6.55 Centurion Works (formally Balmuildy Brickworks) is a large-scale waste and recycling site located on the north-western edge of Bishopbriggs. It is occupied by Hunter Environmental. The surrounding area is characterised predominately by farmland.

6.56 Other nearby uses include Buchley Eco-centre located to the east. Mavis Valley recycling centre to the south-west and Luddon Training Centre to the west.

- 6.57 Accessibility to the site is relatively poor. The site is accessed directly from Balmuirdy Road, north of the site which links to the A879 to the west. The site is quite detached from the strategic road network. There are no public transport connections within walking distance of the site.
- 6.58 The site is a single occupier site; currently operated as a recycling centre by Hunter Environmental. The site comprises one large warehouse building, a storage area, lorry parking areas and an office building with ancillary car parking to the front, facing Balmuirdy Road. The site is well-maintained and the buildings are in good condition. The site has efficient internal circulation, and good connectivity to surrounding industrial uses.
- 6.59 The site is fully built out, and there are limited opportunities for expansion which would require the acquisition of neighbouring farmland.
- 6.60 **Conclusion: This is a well-functioning single occupier site which meets the requirements of the current occupier. The site is fully built out and any further expansion is reliant on expansion into surrounding farmland. No specific policy response required.**

Site 10 - Hilton Depot



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.2	-	-



6.61 Hilton Depot is a small-scale waste and recycling site located on the north-western edge of Bishopbriggs. It is occupied by East Dunbartonshire Council. The surrounding area is predominately farmland.

- 6.62 Nearby uses include Buchley Eco-centre to the north-west, and Cawder Golf club to the north-east. The Leisuredrome is located to the south. Further afield to the south lies the residential area of Bishopbriggs.
- 6.63 Accessibility to the site is relatively poor. The site is accessible via Balmuirdy Road which links to local markets in the A879 to the west and the A803 to the east. Balmuirdy Road is relatively narrow and access to the site is at the brow of a hill. There are no public transport connections within walking distance of the site.
- 6.64 The site is a single occupier site; currently operated as waste recycling centre/depot by East Dunbartonshire Council. The site comprises a collection of poor quality warehouse buildings, lorry parking areas and ancillary car parking to the south facing Balmuirdy Road. The structures on the site are in poor condition. The site has constrained internal circulation due to the close proximity of the buildings and large vehicle movements.
- 6.65 The site is fully built out, and there are no opportunities for further expansion or intensification. Although the depot may become surplus to council to requirements once its new depot is delivered. There are no specific timescales for this though. The site could be maintained for employment uses.
- 6.66 **Conclusion: This is a well-functioning single occupier site which meets the requirements of the current occupier. The site is likely to be vacated in the long term and the Council should exhaust opportunities for other employment generating uses before other uses are considered. No specific policy response required.**

Site 11 - Huntershill Village



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
4.5	0.77	Intensification Opportunity
	0.12	Intensification Opportunity



6.67 Huntershill Village is a mixed use business park, located in the south of Bishopbriggs. The site is bounded by B812 to the south and the A803 to the west. The surrounding land uses includes Bishopbriggs Industrial Estate and a small wooded area to the east and residential uses to the north, west and south.

6.68 The site includes a variety of small and start-up businesses and retail units located in portacabins and shipping containers. Businesses include:

- Dog Groomers
- Accountant
- Audio-visual repair specialist
- Non-profit organizations
- Electrical installations and repair services
- Taxi companies
- Lorry Mounted Crane Hire
- Tyre Supply and Fitting Centre
- Waste management company
- Insulation Services
- Health safety and environmental training and consultancy service
- Ironing service
- Lawn Treatment Service
- Cleaning Companies
- Roofing Contractor
- Music courses
- Events planner
- Dog Training Centre
- Facilities Management
- Nursery
- Coffee Shop
- Pet Shop
- Picture Framing
- Gift Shop
- Hairdresser
- Children's clothing stores
- Knitting shop
- Chiropodist
- Dance School
- Furniture Shop
- Tattoo Studio
- Shops
- Tailor
- Kitchen fitter
- Beauty Salon
- Yoga Studio
- Constituency Offices
- Hairdresser
- Wedding dress shop
- Physiotherapy Clinic
- Cake Makers and Decorations

6.69 The site has multiple access points from the B812 and the A803. The A803 provides strong north-south connections to local and regional markets. The nearest bus stops are located on Auchinairn Road to the South, which operate routes to Glasgow. In consideration of this, the site could be seen to have a good level of accessibility.

6.70 The developed parts of the site comprise a series of small mixed use units of medium quality.

6.71 The site has a well-established internal road network with adequate parking for existing users. Planting and signage is generally well maintained but improvements to pavements and roads are required.

6.72 There is a cleared vacant site to the west of the business park which has the potential for the development of small scale business units. Some parking areas could also be intensified

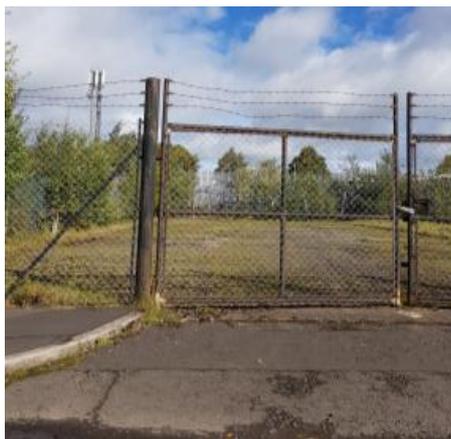
6.73 **Conclusion: This is a well-established and active local employment site with low vacancies. The site attracts demand from the local industrial market. It is recommended that the site is**

retained as a key employment location. There is also scope for intensification which could be supported.

Site 12 - Low Moss Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
3.4	0.27	Vacant Brownfield



6.74 Low Moss is an established mixed use industrial estate, located in the north of Bishopbriggs. The site is located in close proximity to Strathkelvin Retail Park which sits to the north, and is bounded

to the south by the A803 to the west. Residential areas are located to the west and south with a wooded area located to the east.

6.75 The site includes a variety of local and strategic businesses of varying sizes occupying medium and large industrial units. Businesses include:

- Plastics Engineering
- Plastics Engineering
- Corporate office
- Double glazing installer
- Hairdresser
- Beauty Salon
- Children's clothing store
- Clothing Store
- Wholesaler
- Carpet Tiles
- Storage facility
- Carpet Supplier

6.76 Accessibility to the site is relatively good. The site is accessible via Westerhill Road to the south which connects directly to the A803. The nearest bus stops are located on Kirkintilloch Road to the west, which operate routes to Lennoxton, Harestanes, Kilsyth, Torrance and Glasgow.

6.77 The site has reasonable internal circulation with adequate parking for existing users. Areas of grass and signage are generally well maintained. There is some overflow parking on Wellington Road.

6.78 There is a cleared vacant site in the centre of the business park with potential for a further medium sized industrial unit. Given low vacancy rates and good access, this site would be attractive to a local population serving occupier.

6.79 **Conclusion: This is an established, local employment site which attracts demand from local population serving businesses. The site is performing well with a low vacancy rate. It is recommended that the site is retained as an employment site and the vacant site is included within the employment land supply.**

Site 13 - Springfield House, St Mungo Street, Bishopbriggs



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.5	0.32	Vacant Brownfield



6.80 Springfield House is a small scale local industrial estate, located in the centre of Bishopbriggs. The site is bounded by St Mungo Street to the south, a public park to the south-west and residential dwellings to the south. The site is located within close proximity to Bishopbriggs train station to the north-east.

- 6.81 The existing structures on the site are medium sized industrial units which are dated stock. The existing uses primarily serve the local market and include a security system supplier, an accountant, a cake shop, a signage shop, an Indian restaurant and a vehicle repair shop.
- 6.82 The site currently has three access points including the B812 from the south, Crowhill Road to the west and Huntershill Way to the north. Direct access to the B812 is an advantage to the site as it provides strong links to surrounding local markets. The site is quite detached from the strategic road network.
- 6.83 The site is well connected to labour markets with relatively good public transport options. The nearest bus stops are located on Kirkintilloch Road to the North, servicing routes to Kilsyth, Torrance, Lennoxton and Glasgow. Bishopbriggs Railway Station is located within a short walk of the site and offers direct regular services to Glasgow, Alloa, Dunblane and Stirling.
- 6.84 The site has reasonable access from St Mungo Street, however increased movement of heavy vehicles to the site may create challenges as the road is narrow.
- 6.85 The site has an existing internal road network in place, providing adequate access to the current uses. The vacant lot on the site is currently used for parking and some cars were parked on the sides of roads and on pavements which indicates that parking provision for the existing users is inadequate. Signage is generally well maintained but improvements to pavements, roads, boundary walls and many of the buildings on site are required.
- 6.86 There is a cleared vacant site to the centre of the site. Given the age of the existing stock, the site presents redevelopment opportunities.
- 6.87 **Conclusion: Although this is an established, local employment site that currently meets the need of the local industrial market it is however in poor quality and has a high vacancy rate. The site however has been de-allocated and this site should no longer form part of the supply.**

Site 14 - Springfield Works



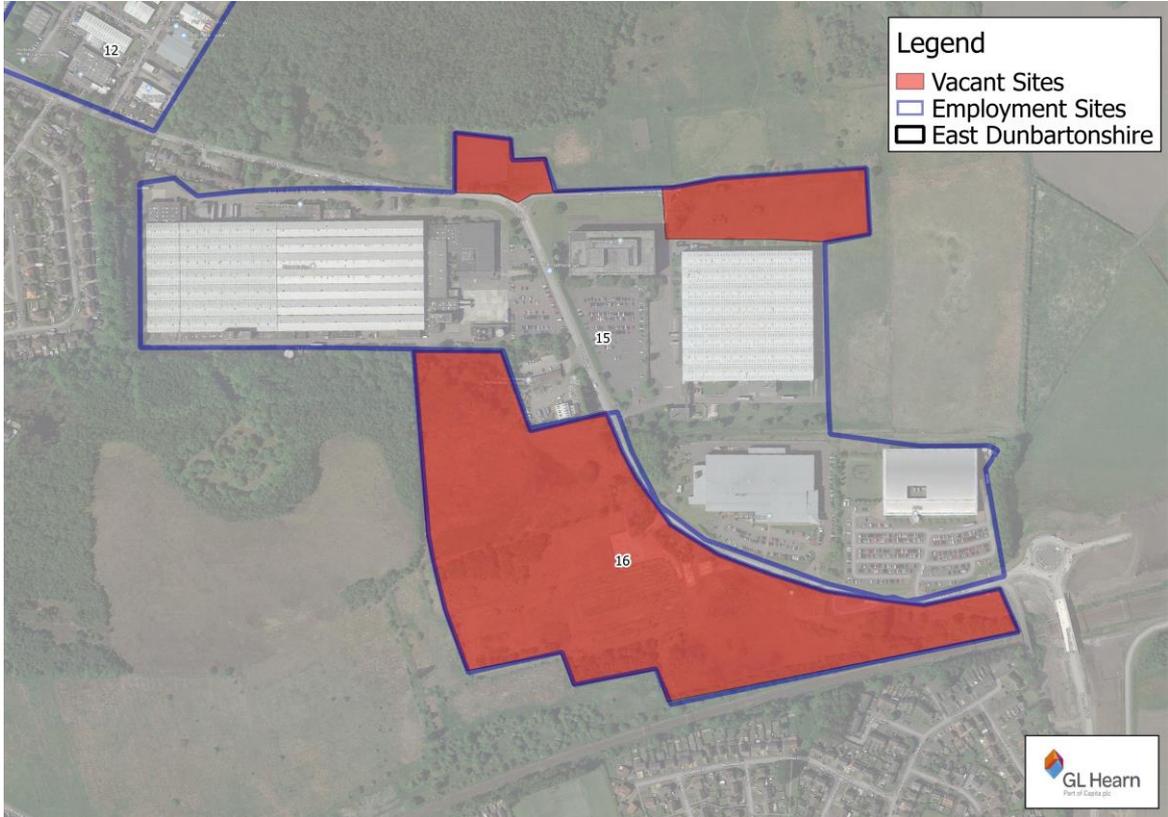
Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
0.3	-	-



6.88 Springfield Works is a small scale local business park, located in the centre of Bishopbriggs. The site is bounded by Emerson Road to the south, residential uses to the north-east and local retail uses (primarily restaurants) to the west.

- 6.89 The site comprises a series of one to two storey commercial structures which are dated stock. The existing uses currently include Citizens Advice Bureau, an appliance Repair Service, an Electrician, a Jewellery manufacturer, a Security Service, a Photographer, a Dental clinic, a Gym, a Chiropodist, a Beauty Salon and a Nursery.
- 6.90 The site is accessed directly off Emerson Road to the south. The site is well positioned to serve the needs of the local market, however it is removed from the strategic road network meaning it is less attractive to uses that require direct motorway access to serve regional markets.
- 6.91 The site is well serviced by public transport. The nearest bus stops are located on Kirkintilloch Road to the west, servicing routes to Kilsyth, Torrance, Lennoxton, Glasgow. Bishopbriggs Railway Station is located within a short walk of the site and offers direct regular services to Glasgow, Alloa, Dunblane and Stirling.
- 6.92 There is only one entrance/exit to the site and parking and turning is relatively tight. Signage and buildings are generally well maintained and vacancy rates are low.
- 6.93 The car parking areas in the site are required for occupiers and access is limited so there are no opportunities for further employment development on this site.
- 6.94 **Conclusion: This is an established, accessible local employment site. There are no opportunities for intensification within the existing area. The employment uses currently on the site should be protected.**

Site 15 & 16 - Westerhill Business Park – North and South



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
25.7	2.2	Vacant Brownfield
	11.29	Vacant Brownfield





6.95 Westerhill Business Park is an established large scale office estate, located to the north-east of Bishopbriggs. The site is located in close proximity to Strathkelvin Retail Park which sits to the north-west, and is bounded to the south by Westerhill Road (which links to the A893 to the west and the B812 to the east) and the railway line. Residential areas are located to the west and south with HMP Low Moss located to the north-east.

6.96 The site includes businesses occupying large office units. Businesses include:

- Aviva
- John McGavigan Ltd
- Collins Debden
- Harper Collins
- Environmental Reclamation Services Ltd

6.97 The site is accessed directly off the Westerhill Road which leads directly to the A803 to the west and the B812 to the east. The nearest bus stops are located on Westerhill Road, which operate routes to Glasgow. In consideration of the above, the site can be regarded as having a good level of accessibility.

6.98 The site has good internal circulation with adequate parking for existing users. Areas of grass and signage is generally well maintained and parking well marked out however there are large areas of derelict land to the south and east.

6.99 There are cleared vacant sites to the east and south of Westerhill Road and greenfield sites with potential for further development to the south and west with potential for further large scale offices. Due to the good accessibility of the site we believe this would be attractive to an occupier however we do not believe that there is capacity for this whole area to be developed for employment uses given the lack of interest in the existing vacant unit.

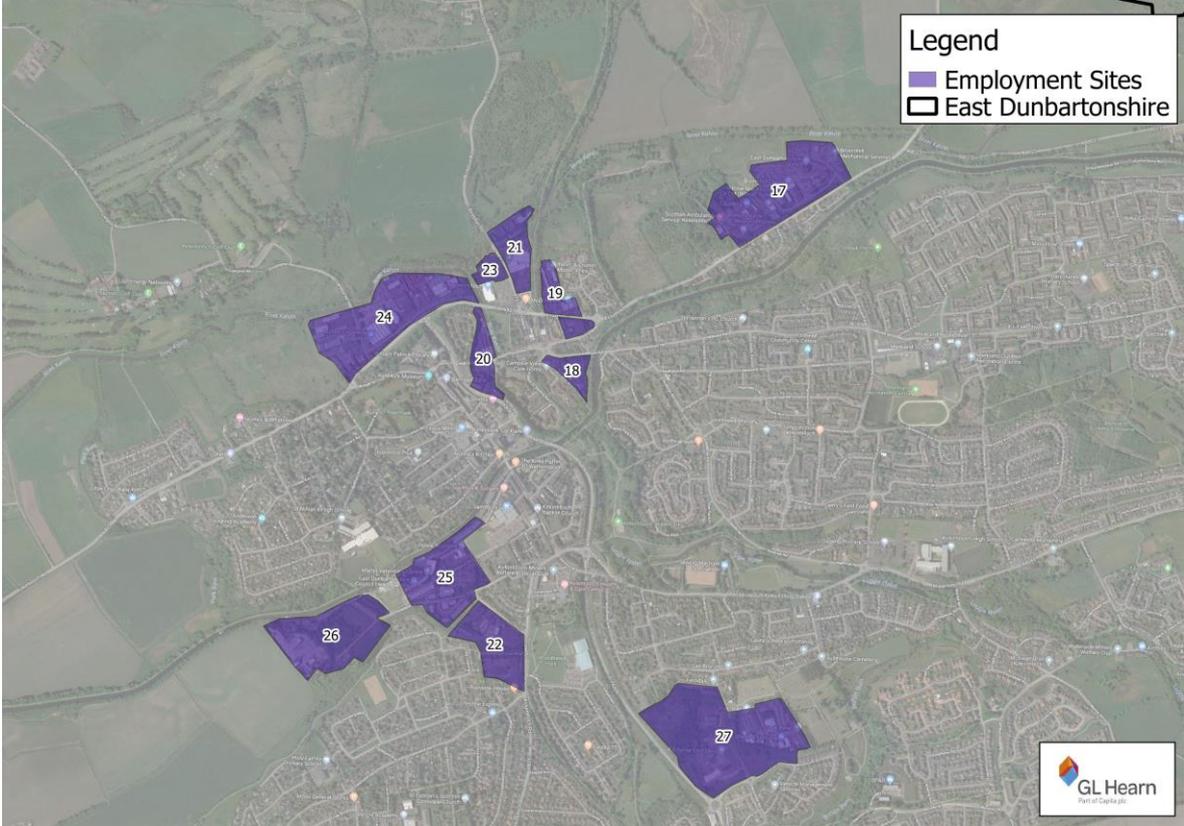
6.100 **Conclusion: The north of the site is a well-established employment site which should be supported for continued employment uses. It is recommended that the northern sites are**

included within the employment land supply. The southern site is of a scale for which there is limited demand and has been vacant for some time.

6.101 However, it is probably the best placed of the three major sites (along with Woodilee and Badenheath) to deliver substantial growth and as a brownfield site should be considered an option should major inward investment appear.

6.102 The southern site should therefore be retained while the market considers the improved road links of if further investment such as access is improved. If this is achieved the site could be considered for employment-led mixed use development although in the longer term.

Kirkintilloch



Site 17 - Broomhill Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
9.1	-	-



6.103 Broomhill Industrial Estate is an established large industrial estate, located to the north-east of Kirkintilloch. The site is located in close proximity to Tintock Pitch (football pitches) which sit to the south of the site, and is bounded to the south by Kilsyth Road (A803). Residential areas are located to the south. The River Kelvin is located to the north, therefore the site is surrounded by a high risk

river flood zone. Caulders Garden Centre, Hayston Garage (car dealership) and Kelvinbank Resource Centre (day support service) are also located within the site.

6.104 The site includes businesses occupying large office units. Businesses include:

- Aviva
- Guala Closures UK Ltd
- East Dunbartonshire Council-
Broomhill Depot
- Ritchie MacKenzie Co Ltd
- Scottish Ambulance Service
- Press-tige
- Ken Kelvin Cars
- Broomhill Mechanical Services
- West Coast Heating Ltd

6.105 The site is accessed directly off Kilsyth Road with accesses to both the north and south of the site. The nearest bus stops are located on Kilsyth Road, which operate routes to Kilsyth, Glasgow. In consideration of the above, the site is considered to have a good level of accessibility.

6.106 The site has good internal circulation with adequate parking for existing users. Areas of grass and signage are generally well maintained and parking well marked out however some of the buildings are in a state of disrepair.

6.107 Currently the site is occupied, car parking areas well used and storage areas also required for current operations. There are no areas of vacant land and any expansion of the business park to the north could encroach into the high flood risk zone to the north so we would not recommend allocating any further sites at this location.

6.108 **Conclusion: Broomhill Industrial Estate is a well-functioning multi occupier mixed use employment site. There are no opportunities for intensification within the existing area. The employment uses at the site should be protected.**

Site 18 - Canal Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.1	-	-



6.109 Canal Street Industrial Estate is small scale local industrial estate, located in the north-east of Kirkintilloch. The site is located in close proximity to the canal – which sits to the south of the site, and it is bounded to the north by Hillhead Road. Residential areas are located to the west, including a care home, and also to the north. The River Kelvin is located to the west of the site so as a result the site is covered by a medium risk flood zone to the north.

6.110 The site includes a range of low rise small industrial units. Occupiers include:

- AMK Self Drive
- The Cross Garage
- Coach House
- D S D Supplies Ltd
- James car company
- RB CAR Surgery
- Deals 4 Wheels
- The Caurnie Soaperie
- T&D Cruickshanks
- DRM Mechanical and Car Sales
- Womens Missfit Fitness

6.111 The site has a single access directly from Canal Street to the south which is a dead end road. This links to Hillhead Road to the north. The nearest bus stops are located on Eastside, to the north, which operate routes to waterside, Kilsyth, Twechar, Banton, Glasgow and Kirkintilloch town centre. In consideration of the above, the site is considered to have a reasonable level of accessibility.

6.112 The site has relatively poor internal circulation with cars parking on both sides of the narrow access road some of the buildings are also in a state of disrepair.

6.113 Currently the site is occupied, car parking areas well used and storage areas also required for current operations. There are no areas of vacant land which could facilitate any expansion of the business park so we would not recommend allocating any further sites at this location.

6.114 **Conclusion: Canal Street Industrial Estate is a well-functioning multi occupier mixed use employment site. There are no opportunities for intensification within the existing area. The employment uses at the site should be protected.**

Site 19 - Eastside Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.1	-	-



6.115 Eastside Industrial Estate is small scale local industrial estate, located in the north of Kirkintilloch. Kilsyth Road travels through the centre of the site. The site is located in close proximity to the

residential area of Kelvinvale which sits to the east of the site, and is bounded to the north by Kilsyth Road (southern portion) which sits to the south of the northern part of the site.

6.116 Kirkintilloch Industrial Estate and Milton Road sit to the west of the site. The River Kelvin is located to the north of the site so as a result the site is covered by a medium risk flood zone with a high risk flood zone located directly to the north on grassland.

- The site includes a range of low rise small industrial units. Occupiers include:
- East Dunbartonshire council
- Sankey Saddlery
- Protecht
- WC Plumbing and Heating
- Sew and Sews
- ES Alternators Auto Electrics
- Kirkintilloch Plumbase
- Landrover Diagnostics

6.117 The site also includes an Evans Halshaw car dealer which faces Kilsyth Road and J&D Lawson funeral director located to the west of the entrance to the northern part of the site. This is a well maintained site and creates an attractive entrance to the industrial estate.



6.118 The northern part of the site has a single access directly from Kilsyth Road to the south which is a dead end road. The southern portion of the site is accessed from an entrance to the south of Kilsyth Road. Kilsyth is an A road and provides links to the wider road network. The nearest bus stops are located on Kilsyth Road, which operate routes to Kilsyth and Glasgow. In consideration of the above, the site is considered to have a good level of accessibility.

6.119 The northern part of the site has relatively poor internal circulation as limited turning areas are available and parking areas are at capacity. The southern portion of the site has larger areas of hardstanding for turning and a more organised car parking arrangement. Both portions of the industrial estate are adequately maintained with good quality roads, clear signage and well maintained boundary fencing. Some of the buildings require minor repairs/repainting but in general

the buildings are in a good state of repair. Around 40% of the units on the estate currently sit vacant which indicates a lack of demand in the area.

6.120 Currently the site is partly occupied, car parking areas well used and storage areas also required for current operations. There are no areas of vacant land which could facilitate any expansion of the business park and there are currently empty units available for occupation so we would not recommend allocating any further sites at this location.

6.121 **Conclusion: Eastside Industrial Estate is a well-functioning multi occupier mixed use employment site located in a sustainable location. There are no opportunities for intensification within the existing area. The employment uses at the site should be protected and occupation of the empty units encouraged.**

- 6.123 High Street Industrial Estate is small scale local industrial estate, located in the centre of Kirkintilloch. The industrial site is split into two with High Street running through the middle. The site is located in close proximity to Eastside public park which sits to the east of the site, and is bounded to the south by High Street (northern portion) the southern portion is bounded by High Street to the north.
- 6.124 The High Street links directly to the Kirkintilloch Bypass (A806) to the west. Further industrial estates Kirkintilloch Industrial Estate and Milton Road sit to the north of the site. The River Kelvin is located directly to the east of the site so as a result the whole site is covered by a medium risk flood zone.
- 6.125 The site includes a range of low rise small industrial units. Occupiers include:
- Broadcroft
 - Reid's Repairs
 - GTM Autocare
 - Lion Autos
 - McLarens Accident Repair Centre
 - Autocraft Engineers
 - Blind Cleaning Services
 - JS Campbell and Son
 - Elders Garage Services
 - Abernethy Garage Services
 - JBS Plant Hire
 - G D McFall Builders
- 6.126 The site also includes retail uses such as a beauty salon, a furniture store, a Halfords Autocentre store, a Kwik-Fit and a cosmetic treatment clinic. Part of the site also has permission for residential uses and is now under-construction.
- 6.127 The northern part of the site has a single access directly from High Street to the south which is a dead end road. The southern portion of the site is accessed from an entrance to the south of High Street, Broadcroft. Broadcroft can also be accessed from the A806 to the south of the site. The A806 (Kirkintilloch Bypass) links to the wider road network The nearest bus stops are located on Eastside, which operate routes to waterside, Kilsyth, Twechar, Banton, Glasgow and Kirkintilloch town centre and on the A806 to the south which operates services to Kilsyth, Milngavie, Twechar, Glasgow, Harestanes and Kirkintilloch. In consideration of the above, the site is considered to have a good level of accessibility.
- 6.128 The northern part of the site has relatively poor internal circulation as the entrance is narrow and limited turning areas are available. Parking areas are at capacity and chained parking bollards have been placed to restrict parking in particular bays. The road is of poor quality and potholes etc. require repairing. The southern portion of the site has limited parking and as a result cars are backed up along the street. However the road surface is in better condition than the northern part. Some of the buildings require minor repairs/repainting but in general the buildings are in a good

state of repair. The site is fully occupied which indicates demand in the area for this type of business space.

6.129 Currently the site is occupied and car parking areas well used. There are no areas of vacant land which could facilitate any expansion of the business park so we would not recommend allocating any further sites at this location.

6.130 **Conclusion: High Street Industrial Estate is a well-functioning multi occupier mixed use employment site located in a sustainable location. There are no opportunities for intensification within the existing area. The employment uses at the remainder of the site (excluding those being redeveloped for housing) should be protected.**

Site 21- Kirkintilloch Industrial Estate East



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
2.6	0.4	Vacant Brownfield



6.131 Kirkintilloch Industrial Estate is a mixed use industrial estate, located to the north of Kirkintilloch. The site is located in close proximity to other industrial estates such as Milton Road which sits to the west and Eastside Industrial estate which sits to the east, and is bounded to the east by Birdston Road (B757). Birdston Road links to the A803 to the south and Milton of Campsie to the

north. The river Kelvin runs through the centre of the site and as a result the site sits within a medium flood risk zone. The northern part of the site sits within a high flood risk zone.

6.132 The site includes businesses occupying large office units:

- Pawling Systems
- Super Dry
- Campsie Glen
- Joyce Martin
- MeruMhor Ltd
- Continental Tile and Bathrooms
- MOT and service Centre

6.133 Other uses include a nurse in the northern part of the site and a car wash and bowling centre in the southern portion of the site. A McDonald's drive through restaurant sits to the south of the site and a Lidl supermarket to the south-west.

6.134 The site is accessed directly off Birdston Road to the east. The nearest bus stops are located on Birdston Road, which operate routes to Clachan of Campsie, Glasgow and Kirkintilloch. The site is considered to have a good level of accessibility.

6.135 The site has good internal circulation with adequate parking for existing users although there is some on street overflow parking in the northern part of the site. Areas of grass and signage are generally well maintained and parking well marked out. There is an area of underutilised land to the south of the site.

6.136 There is potential for further small scale industrial at the southern boundary of the site. There are a number of vacant units in the industrial estate which suggests market demand may be slow.

6.137 **Conclusion: This is an established employment site with several vacant units. It is recommended that the site is retained for employment uses with the vacant brownfield sites included within the employment land supply.**

Site 22 - Lower Whitegates



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
4.7	0.46	Intensification Opportunity
	1.31	Vacant Brownfield



6.138 Lower Whitegates is a mixed use industrial estate, located in the south of Kirkintilloch. The site also includes the former Tom Johnson House site, located to the south of Civic Way. The site is bounded by Lenzie Road to the east which links to the A806 north and Lenzie to the south. The

current land uses near the site include Woodhead Park and Kirkintilloch Leisure Centre on the eastern boundary and Kirkintilloch Health and Care Centre to the north-east of the site.

- 6.139 Residential dwellings neighbour the south of the site. The site is located near other industrial estates such as Southbank Business Park to the north-west and Southbank Works West to the west.
- 6.140 The site is mainly vacant but includes five businesses occupying former industrial units. Businesses include:
- The Mirror Door Company
 - Kidsplay Childcare
 - Viewfield Gallery
 - VPS Underfloor Heating
 - Vulcan Plumbing Supplies
- 6.141 The site has two access points, from Civic Way to the south and Marina Way to the north. The nearest bus stops are located on Lenzie Road, which operate routes to Clachan of Campsie, Harestanes, Waterside, Kirkintilloch, Glasgow and Moodiesburn. In consideration of the above, the site is considered to have a good level of accessibility.
- 6.142 The site comprises of a mixture of buildings of different ages and quality. There is a large, vacant warehouse located to the western rear of the site which is in poor condition with better quality, smaller industrial units located to the south-west.
- 6.143 The site has good internal circulation with more than adequate parking for existing users. Areas of grass and signage are generally poorly maintained and parking spaces not marked out. The former Tom Johnson House site constitutes a large area of derelict land.
- 6.144 There is also a cleared vacant site in the centre of Lower Whitegates which has the potential for further small scale industrial uses. Due to the good accessibility of the site and the strategic location, this site has potential, yet dependent on market demand.
- 6.145 **Conclusion: This is an established employment site with several vacant units and plots with also options for intensification. We would recommend that the potential for a mixed use masterplan to combine both sites is examined.**

Site 23 - Milton Road (Kirkintilloch Industrial Estate West)



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.9	0.45	Vacant Brownfield



6.146 Milton Road is a single occupier site, located to the north of Kirkintilloch. The site is located in close proximity to other industrial estates such as Ramsay Industrial Estate to the west, Kirkintilloch Industrial Estate which sits to the north-east and High Street Industrial estate which sits to the south.

The site is bounded to the west by Birdston Road (B757) which links to the A803 to the south and Milton of Campsie to the north. The river Kelvin runs to the north and west of the site and as a result the site sits within a medium flood risk zone.

- 6.147 The site has a single occupier, Archibald Young Ltd, Founders and Engineers. The company occupies a large and medium sized industrial warehouse and utilises areas of hardstanding for storage.
- 6.148 Neighbouring uses include a Lidl supermarket to the south of the site, bowling centre to the west and McDonald's drive through restaurant to the south-west.
- 6.149 The site is accessed directly off the Birdston Road to the west. The nearest bus stops are located on Birdston Road, which operate routes to Clachan of Campsie, Glasgow and Kirkintilloch. In consideration of the above, the site is considered to have a good level of accessibility.
- 6.150 The site has good internal circulation with adequate parking for existing uses. Internal roads are of high quality, yet landscaping and signage is poorly maintained.
- 6.151 There is a cleared vacant site to the south of Milton Industrial Estate, to the north of the Lidl Supermarket. This has the potential for further small scale industrial. Due to the good accessibility of the site and the sustainable location, we believe this would be attractive to an occupier however demand would need to be established.
- 6.152 **Conclusion: This is an established single employment site. It is recommended that the existing site is retained within the employment land supply. However, the vacant area could be considered for release to other employment generating uses such as leisure or retail.**

Site 24 - Ramsay Industrial Estate



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
8.78	-	-



6.153 Ramsay Industrial Estate is a larger industrial estate, located to north of A803 Glasgow Road and is adjacent to Old Mill Park Industrial Estate to the east. The industrial site contains a mixture of small to medium scale industrial units and storage spaces. The site is located in close proximity to the

River Kelvin which lies immediately to the north. Glasgow Road provides good access to the main road network and Campsie Road runs through the site. Kirkintilloch town centre is within reasonable walking distance of the site.

6.154 The site is fully developed and includes a range of low to medium rise industrial units. The site includes a wide range of suppliers from locksmiths to car valeting. There are some newer modern buildings such as the structure which houses Guala Closures UK Limited, a manufacturer of alumni and non-refillable closures. Occupiers of the site include:

- Vector Electronic Repair
- Blue Bio Water Ltd
- North Sea Plastics
- LSK Supplies
- Signature Interiors
- Howdens Joinery
- Avonclyde
- Plumb Centre

6.155 The site also includes uses that are non-business such as a gym and fitness centre.

6.156 The site has a single main access directly from Campsie Road. The road appears to be in good condition. The nearest bus stop is outside Kirkintilloch Fire Station where bus services operated by First Group run to Glasgow.

6.157 The site has relatively good internal circulation with the Campsie Road running through the site and local access roads running off this within the estate to the west. Parking areas appear to be at capacity. There are some units with clearly defined car parking spaces but in the majority of units these are not clearly marked out so cars and storage areas are laid out in a haphazard manner. The road is of reasonable quality but there are some areas of poorer quality with potholes that require repairing. Most of the buildings appear to be in a reasonable state of repair and several units are vacant. The site is otherwise occupied which indicates a small demand in the area for this type of business space.

6.158 Currently the site is occupied and car parking areas well used. There are no areas of vacant land which could facilitate any expansion of this business use so we would not recommend allocating any further sites at this location.

6.159 **Conclusion: Ramsay Industrial Estate is a larger employment site with a wide range of occupiers. There appear to be no vacant units and the site is operating near to capacity. There are no opportunities for intensification within the existing area and we would recommend that the council retains this site for business use.**

Site 25 - Southbank Business Park



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
5.9	-	-



6.160 Southbank Business Park Southbank is a medium sized industrial estate offering 22 Class 4 industrial units ranging in size from 500 - 3000 sq ft. Southbank provides a secure trading environment for businesses by virtue of a 32 camera CCTV system and regular patrols by on site guards outside business hours.

- 6.161 The Forth and Clyde Canal bounds the site to the north and west while the Lenzie Road runs to the south. A number of the more modern units have developed near the marina associated with the canal.
- 6.162 Each unit has its own forecourt parking. The site contains a mixture of small to medium scale industrial units and storage spaces. There are some larger units such as the building which house the headquarters of East Dunbartonshire Council. The site is located in close proximity to the Forth and Clyde canal which lies immediately to the north.
- 6.163 The site is fully developed and includes a range of low to medium rise industrial units. The site includes a wide range of occupiers including some larger occupiers such as the headquarters of East Dunbartonshire Council, which occupies a newer modern building. Occupiers include:
- East Dunbartonshire Council
 - McGregor McLeod
 - Kitchens Express 24
 - Halo Pathways
 - Martin Veterinary
 - Kenwil Limited
 - Fulcrum Training Limited
 - FSL Fabrication
- 6.164 The site also includes uses that are non-commercial such as a Halo Pathways Yoga centre.
- 6.165 The site has a number of access points directly from Lenzie Road from which a number of internal distributor roads form. The roads appear to be well maintained and are in reasonable condition. The site is also well signposted although some of the signage boards could do with upgrading. The nearest bus stops are at Civic Way and Eastergreens Avenue which are both some distance away from the western part of the site.
- 6.166 Parking areas appear to be at capacity and is sporadic in parts. There are some units with clearly defined car parking spaces such as the Council headquarters car park but in the majority of units these are not clearly marked out so cars and storage areas are laid out in a haphazard manner.
- 6.167 Currently the site is fully occupied and car parking areas are well used. There are no areas of vacant land which could facilitate any expansion of this business use so we would not recommend allocating any further sites at this location.
- 6.168 **Conclusion: Southbank business centre is a medium sized employment site with a wide range of occupiers. These are predominantly office based particularly in the larger units. There appear to be no vacant units and the site is operating near to capacity. There are no opportunities for intensification within the existing area and we would recommend that the council retains this site for business use.**

Site 26 - Southbank Works



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
8.3	4.15	Intensification Opportunity



6.169 Southbank Works West is a single user industrial site which covers 8.3 ha and is occupied by a concrete company. There is a small amount of vacant land but such is the nature of the current user it is unlikely that compatible uses would wish to locate here.

- 6.170 The Park Burn provides a distinct boundary around the site to the south and east.
- 6.171 The site is almost fully developed by the cement company and includes a number of industrial sheds, storage areas and a small office. The single occupier is Robeslee concrete company limited, which is a concrete product supplier.
- 6.172 The site has a single access point and sits at the end of Rosebank Road. A number of heavy vehicles and lorries use the site to transport materials and products associated with the business. There are no bus stops nearby.
- 6.173 The site is a single occupier site; currently operated as cement works by Robeslee concrete company limited. The site comprises a small number of industrial sheds, storage areas, lorry parking areas, which are not marked out as well as an office building with ancillary car parking.
- 6.174 The site is mostly built out, and there are no opportunities for further expansion. However the eastern end of the site appears disused although the site couldn't be fully accessed. The site offers some opportunity for increased employment uses through intensification.
- 6.175 **Conclusion: This is a well-functioning single occupier site which meets the requirements of the current occupier, a cement works. The site is largely fully built out although there is also a large area of vacant land on the eastern part of the site which could be used for expansion purposed for the existing uses. No specific policy response required.**

Site 27 - Woodilee Industrial Estate, Lenzie



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
15.1	7.61	Vacant Brownfield
	1.21	Vacant Greenfield
	0.15	Vacant Greenfield



6.176 Woodilee Industrial Estate sits in the centre of Lenzie and offers a mix of industrial and warehousing units with workshop and ancillary office space. It is a medium sized industrial estate of which a number of the buildings are older. The general appearance of the estate is aged and in

need of investment. To the west of Innovation Road there is a small strip of land. The northern part of the site is vacant and the southern end is occupied by a single, modern office premises occupied by Deafblind Scotland.

6.177 The A806 Initiative Road bounds the site to the west and provides the estate with good accessibility onto the main road networks. Woodcroft Road runs to the south and the Auld Hill Cemetery provides the north and east.

6.178 The main access into the site is from Woodcroft Road and the roundabout. From this Woodilee Road runs through the centre of the site. At this key entrance to the site is a significant portion of brownfield land.

6.179 There are currently nine businesses located at the site: Businesses include:

- Woodilee MOT centre
- R Tinning & Sons, Joiners
- PW Hall, plastic fabrication
- Tedesco, tile centre

6.180 The site includes a mixture of buildings but these are generally older with some buildings in a relatively poor condition. A number of areas of the site are given over to ad-hoc storage with a number of shipping containers in evidence.

6.181 The site has reasonable internal circulation with the roads looking to be in an okay condition. There are few areas of dedicated parking but there is no evidence of parking being an issue given the amount of vacant land.

6.182 The larger vacant site to the west still has some occupiers although the condition of the building is almost derelict. The smaller vacant site to the east would share access with the deafblind offices but is currently a vacant greenfield site. The vacant site to the east is being marketed for a residential opportunity.

6.183 The smaller vacant site to the west would only offer a small office based development opportunity in much the same guise as the Deafblind Scotland development to its south. While there is a further vacant site to the south of that access would prevent that from development.

6.184 **Conclusion: There are two large cleared sites, which have good accessibility onto Woodcroft Rd with a further smaller site to the west. Although the has good accessibility and is in a sustainable location, there does not appear to be market demand for a development of this scale as demonstrate by the previously cleared site. The remaining units which survive and the overall appearance of the industrial estate is poor. The Council should consider zoning the sites for different uses with the potential to deliver mixed use development.**

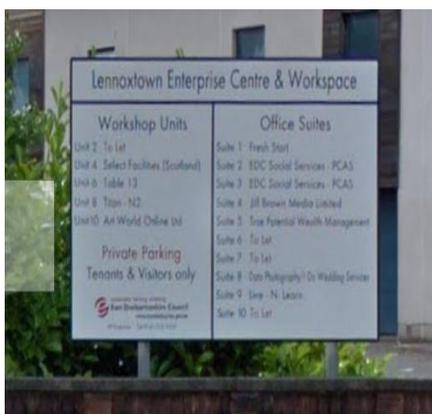
Lennoxtown



Site 28 - Lennoxtown Enterprise Centre



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
0.44	-	-



6.185 Lennoxtown Enterprise Centre is a small industrial estate housing a number of office suites as well as workshop units.

- 6.186 The site is situated within the centre of the town. There is a bus stop within 150m (164yds) of the venue. The nearest mainline station is Milngavie.
- 6.187 The main access to the site is off Station Road. Parking is available for tenants and visitors.
- 6.188 There are currently a number of office suites and workshop units available to let. Occupiers in the office suites include financial advisers and architects. Within the workshop units are window suppliers and a catering supplies company. There are no opportunities for further expansion of the site.
- 6.189 **Conclusion: This is a small, highly accessible and centrally located site which provides good quality office space and workshop units. Further efforts could be made to enhance the take up of the vacant units.**

Site 29 - Veitch Place

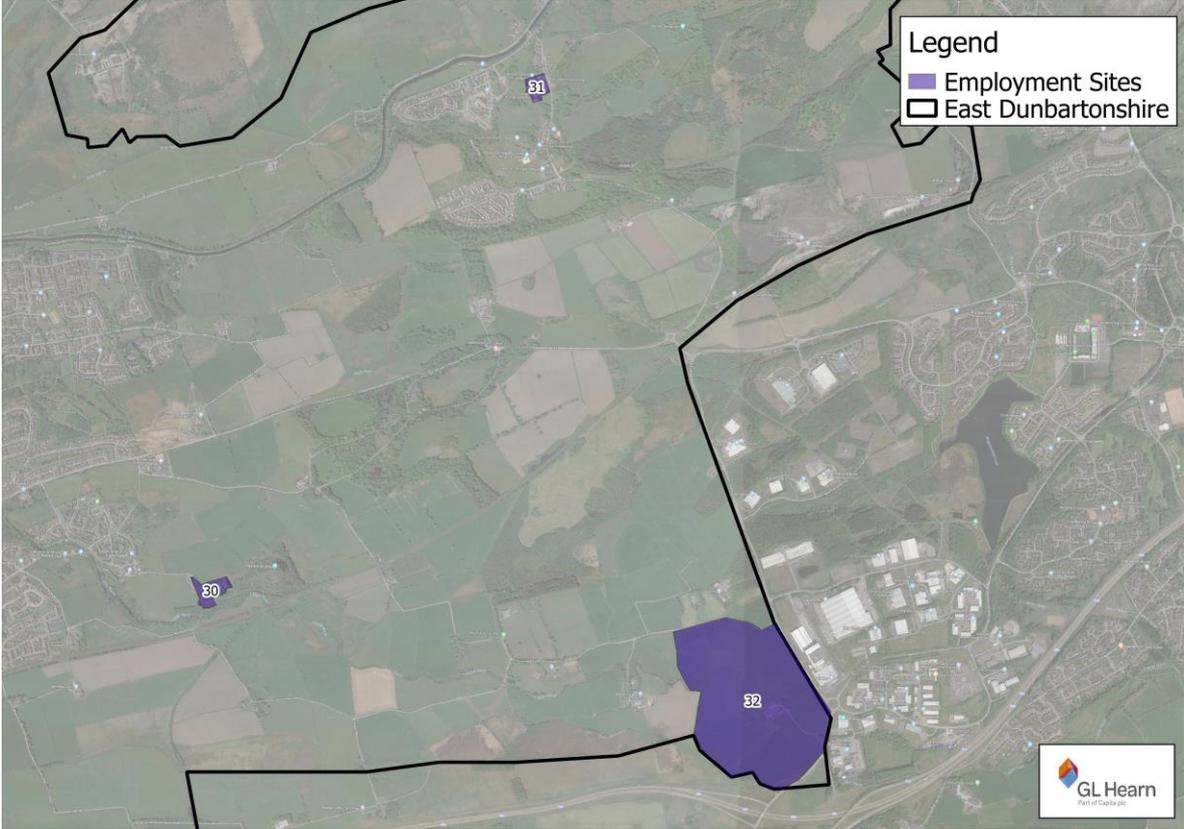


Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.44	-	-



- 6.190 Veitch Place is a small industrial estate containing two occupiers. Highland Spring sits to the south of Veitch Place and Lennoxton Garage sits to the north.
- 6.191 The site is situated within the centre of the town. The main access to the site is from Station Road which lies to the west of the site. Veitch Road runs off this and separates the site into two. There is a bus stop within 150m (164yds) of the site. The nearest mainline station is Milngavie.
- 6.192 Internal service roads are not in great condition with a number of potholes evident.
- 6.193 The Highland Spring site is partially surrounded by six feet high security fencing. There is an extremely small portion of vacant land to the north-west of the site which sits adjacent to greenfield land.
- 6.194 **Conclusion: This is a centrally located site which accommodates town occupiers who sit either side of Veitch Road. The very small amount of vacant land to the north-west is not considered suitable for development given the dominance of the current two occupiers and the likely accessibility constraints.**

Twechar and West



Site 30 - Pit Road, Waterside



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.79	1.79	Redevelopment Opportunity



6.195 Pit Road is small scale local industrial estate, located to the south-west of Waterside. The industrial site contains a mixture of small scale industrial units and storage spaces. The site is located in close proximity to Luggie Water River which sits to the south of the site, and is bounded to the west by Pit Road. Pit Road links the site to the small residential settlement of Waterside to the north-west.

There are no other industrial or business uses within the area with farmland surrounding the site and railway tracks to the south.

6.196 The site includes a range of low rise small industrial units. Occupiers include:

- Universal Fastening Systems
- CIP Fastening Systems
- G20 Joinery Ltd
- Acceler8 Auto Services
- Ardwell Bay Limited
- Wright Travel (glasgow) Ltd
- Ann's Coaches
- Bulldog Fixings

6.197 The site also includes uses that are non-commercial related such as a dog training centre.

6.198 The northern part of the site has a single access directly from Pit Road which is a narrow, poor quality road leading to and through the centre of Waterside. Pit Road is also accessed to the south of the site which also provides links to Waterside and small farm tracks to the south. There are no bus stops or public transport links in close proximity of the site and it is considered that the access is not suitable for existing users given the poor quality, narrow road which runs through the centre of the residential area of Waterside. In consideration of the above, the site is considered to have a poor level of accessibility.

6.199 The site has relatively poor internal circulation as the entrance is narrow and limited turning areas are available. Parking areas are at capacity and not clearly marked out so cars and storage areas are laid out in a haphazard manner. The road is of poor quality and upgrades are required to address potholes for example. Most of the buildings are in a state of disrepair and several units are vacant. The site is otherwise occupied which indicates a small demand in the area for this type of business space.

6.200 Currently the site is occupied and car parking areas are well used. There are no areas of vacant land which could facilitate any expansion and therefore it is not recommended that any further sites are allocated at this location.

6.201 **Conclusion: Pit Road is a very poor quality multi-occupier employment site located in an inaccessible location. There are opportunities for intensification within the existing area but we would recommend that the council examines the long term future of this site for business use or as a potential redevelopment site.**

Site 31 - Twechar Business Park



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
1.25		



6.202 Twechar Business Park is a small business park which is located in the eastern part of Twechar, which is a small former mining village.

6.203 The business park consists of five main buildings and lies to the west of Main Street. It is surrounded to the north, south and west by woodland.

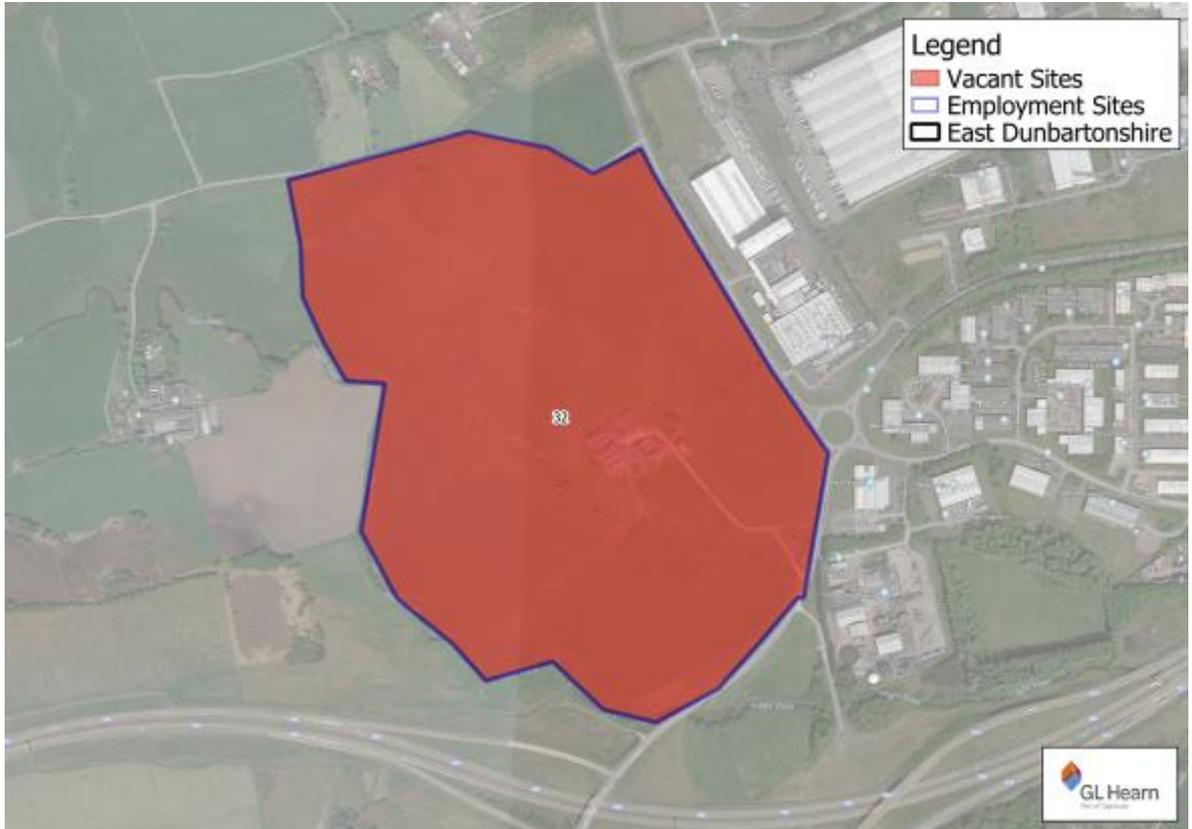
6.204 The business park consists of fairly modern low rise buildings which appear to be in good condition. The main access into the site is from Main Street which runs into Barrhill Lane. There is good internal circulation and there are dedicated car parking spaces associated with the units.

6.205 The buildings appear to be fully let and the site is fully developed. There are a range of businesses located at the site: Businesses include

- Top Cat Window Blinds.
- Paterson Air Safety systems
- Charcuterie Continental
- Strathclyde Vulcanising Services

6.206 **Conclusion: Twechar Business Park appears to function well and houses a small number of local businesses. There would appear to be some room for expansion to the south of the site but until such time as there is unmet demand then we would recommend no further allocation here.**

Site 32 - Badenheath



Site Area (ha)	Vacant Area (ha)	Nature of Vacant Land
49.95	49.95	Vacant Greenfield



- 6.207 Badenheath is a large, undeveloped greenfield site. At almost 50 ha it is the largest site within East Dunbartonshire. The Luggie Water forms a boundary to the south and west of the site. The site is therefore potential subject to a risk of flooding.
- 6.208 Mollins Road lies to the east of the site and forms the boundary between East Dunbartonshire and North Lanarkshire Council areas. There is a minor access road running off Mollins Road to the south of the site. There is an obvious potential access point onto Mollins Road roundabout if the site is ever developed. To the north of the site lies Gartshore Road which has a minor access road into part of the site.
- 6.209 Directly across from the site is Westfield North which lies in the North Lanarkshire council area and provides direct competition to the sites intended uses. Westfield North forms part of the popular and established Westfield Estate and is accessed from Grayshill Road via Westfield Road.
- 6.210 It is situated 4 miles south-west of Cumbernauld town centre and is a short distance from Junction 4 of the M80 and Junction 3 of the M73. Regular bus services pass by which provide access to and from the train station in the centre of Cumbernauld and also to central Glasgow. Occupiers within Westfield North include AG Barr, M&S, DHL, Arnold Clark, Mizuno and Davies Turner.
- 6.211 Although the site provides a warehousing and logistics development opportunity this is only really in the long term. Neighbouring sites are better positioned and long established and have yet to find an occupier.
- 6.212 **Conclusion: As there is already a well-established industrial estate on the other side of Mollins Road with available business space being marketed for some time it is not recommended that Badenheath is allocated for employment uses at this time.**

7 DEMAND ASSESSMENT

Introduction

- 7.1 This section initially considers future employment growth in East Dunbartonshire as forecasted by Oxford Economics (OE) for Q3 2018. Following the forecast analysis, we examine herein the demand for employment land and floorspace over the period from 2018-38. This considers requirements for employment land in use classes 4, 5 and 6.
- 7.2 Econometric forecasts take account of differences in expected economic performance moving forward relative to the past, overall in regard to the sectoral composition of growth. However a detailed model is required to relate net forecasts to use classes and to estimate gross floorspace and land requirements.

Employment forecasting

- 7.3 Data has been provided by Oxford Economics to support the preparation of the emerging East Dunbartonshire Regional Skill Assessment (RSA). RSAs aim to provide a coherent evidence base on which to base future investment in skills, built up from existing datasets.
- 7.4 These assessments highlight economic and labour market data, offering trends and forecasts at both regional and local authority level. They include an introduction to the region's economy, place and people; past, current and forecast employment demand; and implications for planning.
- 7.5 RSAs are developed and used by Skills Development Scotland and its partners including Highlands and Islands Enterprise, Scottish Enterprise, the Scottish Funding Council and the Scottish Local Authorities Economic Development Group. Oxford Economics produces the forecast, dated 2018 Q3, on behalf of the above partnership.
- 7.6 As well as the trend-based, baseline forecasts GL Hearn have generated a growth scenario which takes into account known investment and on-going economic strategies which are likely to alter historic trends and boost local growth.
- 7.7 This was informed by the review of policy and economic strategies both for East Dunbartonshire, Glasgow City Region and the Greater Glasgow Area. It was also informed by our survey of local businesses and their view of their own and the wider market activity.

Jobs Growth

7.8 The baseline forecasts show growth of just 970 jobs in East Dunbartonshire over the 2018 to 2038 period. This equates to a growth of just 3% or annually at 0.2%. There are some major sectors of growth including some higher value sectors such as Construction (+470 jobs) and Professional, Technical and Scientific (+380 jobs). In percentage terms there is also a notable increase in the admin and support services sector (21%).

Table 4: Jobs Growth Baseline Scenario (2018-38)

Total employment by detailed sector	2018	2038	2018-38 Change	2018-38 % Change	2018-38 CAGR
Agriculture Etc.	320	280	-40	-12%	-0.6%
Mining	20	10	-10	-49%	-3.3%
Manufacturing	1,640	1,200	-440	-26%	-1.5%
Utilities	150	120	-30	-17%	-0.9%
Water and Waste	340	280	-60	-17%	-0.9%
Construction	2,300	2,770	470	20%	0.9%
Wholesale and Retail	5,170	5,320	150	3%	0.1%
Transportation and storage	590	570	-20	-3%	-0.2%
Hospitality	2,040	2,100	60	3%	0.1%
Info and Comms	1,170	1,260	90	7%	0.3%
Finance	380	350	-30	-7%	-0.4%
Real estate activities	470	510	40	9%	0.4%
Prof, Tech and Sci	2,030	2,410	380	19%	0.9%
Admin and support services	1,250	1,520	270	21%	1.0%
Public Admin	1,940	1,610	-330	-17%	-0.9%
Education	3,670	3,610	-60	-2%	-0.1%
Health and Social Work	4,010	4,280	270	7%	0.3%
Arts and Rec	1,360	1,490	130	9%	0.4%
Other Services	1,960	2,070	110	6%	0.3%
Total	30,810	31,780	970	3%	0.2%

Source: OE, 2018

7.9 This was off-set by significant losses in Manufacturing and Public Administration and Defence. The former is driven by a decline in manufacturing of rubber and plastic products. The latter is driven by public administration rather than defence.

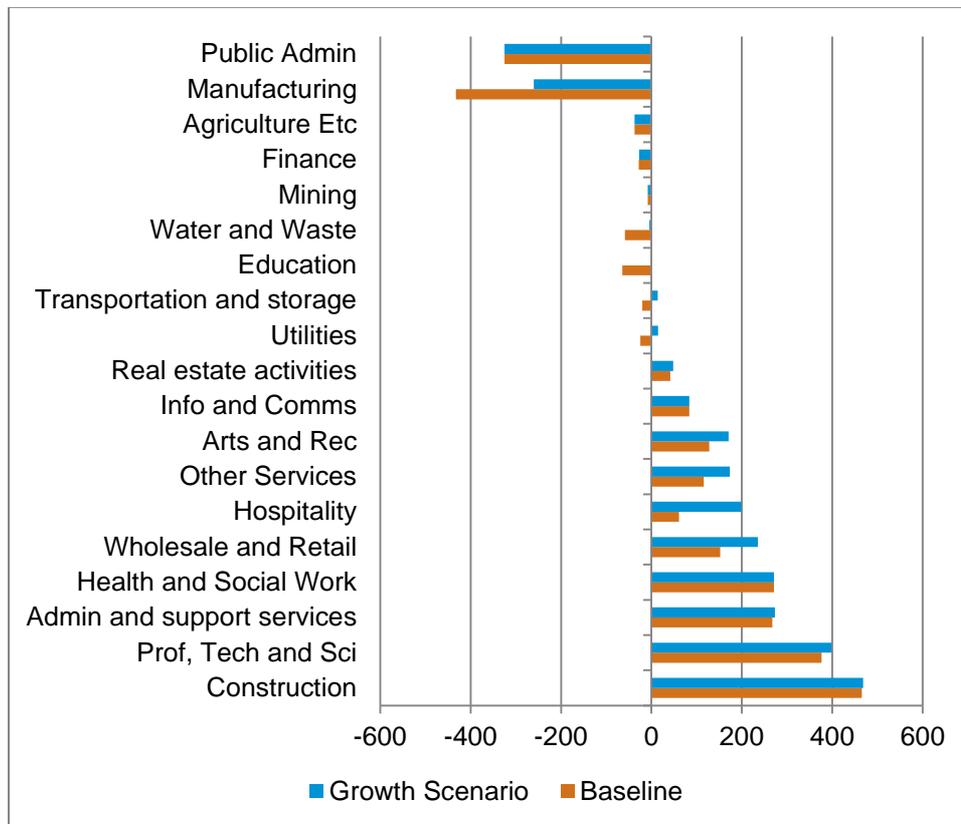
7.10 There is also significant decline in the percentage employed in mining and quarrying, although this relates to a very small number of jobs (-10).

7.11 The adjustments to the baseline scenario results in an additional 720 jobs being added to the growth forecast. In total the growth scenario results in a total of 1,690 additional jobs over the 2018-38 period.

7.12 We have made adjustments to a number of sub-sectors which have then been aggregated to the sectoral comparison below. The notable changes include a reduction in the expected decline of manufacturing, retails and utilities. Some of this relates to those six growth sectors identified by the Scottish Government.

7.13 We have also increased jobs within the Professional, Scientific and Technical and Construction sectors to reflect the City Deal and the Regional Economic Strategy.

Figure 16: Comparison between forecasts (2018-38)



Source: OE and GL Hearn, 2018

7.14 Likewise, due to the focus on developing tourism we have included improvements to the Arts, Recreation and Leisure and the hospitality issues. We have also increased the expected growth in Retail based on recent improvements to the town centres.

7.15 The growth scenario results in an overall increase of 5% or 0.3% per annum. This compares to a loss of 0.1% per annum over the previous twenty years (1998-2018) and 0.2% per annum in the baseline growth. This is higher than the Scotland equivalent 0.15%.

7.16 This is again driven by significant growth in the Construction (+470 jobs) and Professional, Technical and Scientific (+380 jobs) sectors. Typically these sectors can have high levels of home

working e.g. self-employed tradesmen working on site but based effectively in their home/van. Similarly home based consultancy work would fall in to the latter sector.

7.17 While this could stifle the demand for additional employment space this could be offset from growth in these and similar business requiring a move away from home working and into traditional employment use classes.

7.18 There are also a notable number of sectors which have more than 20% growth over the 2018 to 2038 period. This includes Construction, Professional, Technical and Scientific and Admin and Support Services.

Table 5: Jobs Growth Scenario (2018-38)

Total employment by sector	2018	2038	2018-38	2018-38 % Change	2018-38 CAGR
Agriculture Etc.	320	280	-40	-12%	-0.6%
Mining	20	10	-10	-49%	-3.3%
Manufacturing	1,640	1,380	-260	-16%	-0.9%
Utilities	150	160	10	10%	0.5%
Water and Waste	340	340	0	-1%	-0.1%
Construction	2,300	2,770	470	20%	0.9%
Wholesale and Retail	5,170	5,400	230	5%	0.2%
Transportation and storage	590	610	20	2%	0.1%
Hospitality	2,040	2,240	200	10%	0.5%
Info and Comms	1,170	1,260	90	7%	0.3%
Finance	380	350	-30	-7%	-0.4%
Real estate activities	470	520	50	10%	0.5%
Prof, Tech and Sci	2,030	2,430	400	20%	0.9%
Admin and support services	1,250	1,530	280	22%	1.0%
Public Admin	1,940	1,610	-330	-17%	-0.9%
Education	3,670	3,670	0	0%	0.0%
Health and Social Work	4,010	4,280	270	7%	0.3%
Arts and Rec	1,360	1,530	170	13%	0.6%
Other Services	1,960	2,130	170	9%	0.4%
Total	30,810	32,500	1,690	5%	0.3%

Source: OE and GL Hearn, 2018

7.19 There are still some notable declines, including again the manufacturing and public administration and defence sectors, albeit these are less so than previous.

Land Demand

7.20 In order to translate the total number of jobs to Full-Time Equivalent, we have examined levels of full and part time jobs for each sub-sector for East Dunbartonshire. Across the Council area and all sectors the FTE jobs equate to around 83% of total employment. The baseline scenario results in

an FTE jobs increase of 800 over the 2018-38 period. The growth scenario results in a growth of 1,440 FTE jobs over the same period.

7.21 We have then assumed a percentage of jobs in each sub-sector which fall onto use class 4(abc), 5 and 6 as well as in other uses. The result of this step for both scenarios is set out in the table below. As demonstrated, only 250 jobs in the baseline scenario and 540 jobs in the growth scenario would be hosted in Offices, Factories and Warehousing.

7.22 The majority of growth is in office based jobs (use class 4ab) with a notable decline in factory based employment (use class 5). This is mitigated slightly in the growth scenario.

Table 6: FTE Jobs by Use Class and Growth Scenario (2018-38)

	Baseline	Growth
Use Class 4ab	460	530
Use Class 4c	-50	30
Use Class 5	-240	-160
Use Class 6	80	140
Non-B	550	900
Total	800	1,440
B-Class Total	250	540

Source: OE and GL Hearn, 2018

7.23 One of the notable increases between the scenarios is the difference between the Warehousing jobs (use class 6). The Growth scenario sees 60 more jobs.

7.24 In modelling this and the other levels of growth in employment use classes we have used estimated employment densities drawn from the *HCA Employment Densities Guide: 3rd Edition* (HCA, 2015). This assumes fairly standard use of industrial (36 sq.m per employee) and light industrial uses (47 sq.m per employee) (Use class 4c and 5 respectively).

7.25 For employment in offices (use class 4ab) we have assumed high density employment in a density between financial and call centre set up. This assumes 9 sq.m per employee. For warehousing employment we have assumed delivery of space in a mix of regional and final mile distribution. This assumes 73.5 sq.m per employee.

Table 7: Modelling Assumptions

Use Class	Employment Density (SQM Per FTE)	Plot Ratio
Use Class 4ab	9	0.5
Use Class 4c	47	0.4
Use Class 5	36	0.4
Use Class 6	73.5	0.4

Source: OE and GL Hearn, 2018

- 7.26 Recognising that employment locations will also require external space for parking, storage, circulation and landscaping, among other reasons, we have applied a plot ratio to the total floorspace growth. However in planning terms the focus should be on the floorspace growth as delivery can come in a number of guises.
- 7.27 As set out in the table above for office locations we have assumed that 50% of the area is taken up by the offices themselves. This is medium to low, recognising that most delivery will likely be in business park type development rather than town centres.
- 7.28 For both industrial and warehousing uses we have assumed that only 40% of the area will be taken up by these uses. This reflects the greater yard space requirement for such uses in a suburban environment such as East Dunbartonshire.

Baseline Scenario

- 7.29 Using these assumptions against the identified number of jobs in each use class the baseline scenario results in an overall loss of around 1,000 sq.m of employment floorspace which translates to a reduced demand for land of around half a hectare.

Table 8: Baseline Scenario Floorspace and Land Requirement (Ha) – 2018-38

	Floorspace	Employment Land
Use Class 4ab	4,173	0.83
Use Class 4c and 5	- 10,840	-2.71
Use Class 6	5,692	1.42
Total	-974	-0.45

Source: OE and GL Hearn, 2018

- 7.30 However these are net changes and do not take account of replacement demand, such as from existing companies requiring upgraded floorspace. In considering how much employment land to allocate, it is therefore appropriate to include a margin to provide some flexibility within the supply.
- 7.31 To calculate an appropriate margin of flexibility we have used post 2007 gross permissions in East Dunbartonshire. The past permissions data shows an annual average rate of around 4,800 sq m of floorspace. Five years' worth of permissions is equivalent to c.24,200 sq. m and this has been included as a buffer in the labour demand forecast.

Table 9: Buffer Calculation (sq m)

	Permitted 2007-2018	Average Annual Permissions (07-18)	Buffer (sqm)	Buffer (Ha)
Use Class 4ab	21,959	1,996	9,981	2.00
Use Class 4c and 5	28,702	2,609	13,046	3.26
Use Class 6	2,395	218	1,089	0.27
Total	53,056	4,823	24,116	5.53

Source: OE and GL Hearn, 2018

7.32 We recognise that not all of this has actually been built out and there is a high level of uncertainty about it. However it is the best available indicator we have of trend based demand.

7.33 This is then added to the baseline need. The resultant overall need from the Baseline scenario is thus calculated as 5.08 Ha over the 2018-38 period. In floorspace terms the need would be for 23,142 sq m of additional employment land.

Table 10: Baseline Land Requirement Including Buffer

	Excluding Buffer 2018-38 (ha)	Buffer (sq m)	Including Buffer 2018-38 (ha)
Use Class 4ab	0.83	2.00	2.83
Use Class 4c and 5	-2.71	3.26	0.55
Use Class 6	1.42	0.27	1.70
Total	-0.45	5.53	5.08

Source: OE and GL Hearn, 2018

7.34 The majority of the growth is required in office and warehousing space uses reflecting respectively completions trends and forecast growth. There is also a small demand for replacement light and general industrial uses.

Growth Scenario

7.35 The same calculations can also be made to the Growth Scenario. As set out in the table below the growth scenario results in a requirement for 2.43 Ha for the 2018-38 period. The majority of this is in warehousing space.

Table 11: Growth Scenario Floorspace Land Requirement (Ha) -2018-38

	Floorspace	Employment Land
Use Class 4ab	4,756	0.95
Use Class 4c and 5	-4,296	-1.07
Use Class 6	10,208	2.55
Total	10,668	2.43

Source: OE and GL Hearn, 2018

- 7.36 Once the buffer is included in this calculation the overall growth increase to just under 35,000 sqm of employment floorspace accommodated in around 8 Ha of employment land across the 2018 to 2038 period.

Table 12: Growth Scenario Land Requirement Including Buffer (2018-38)

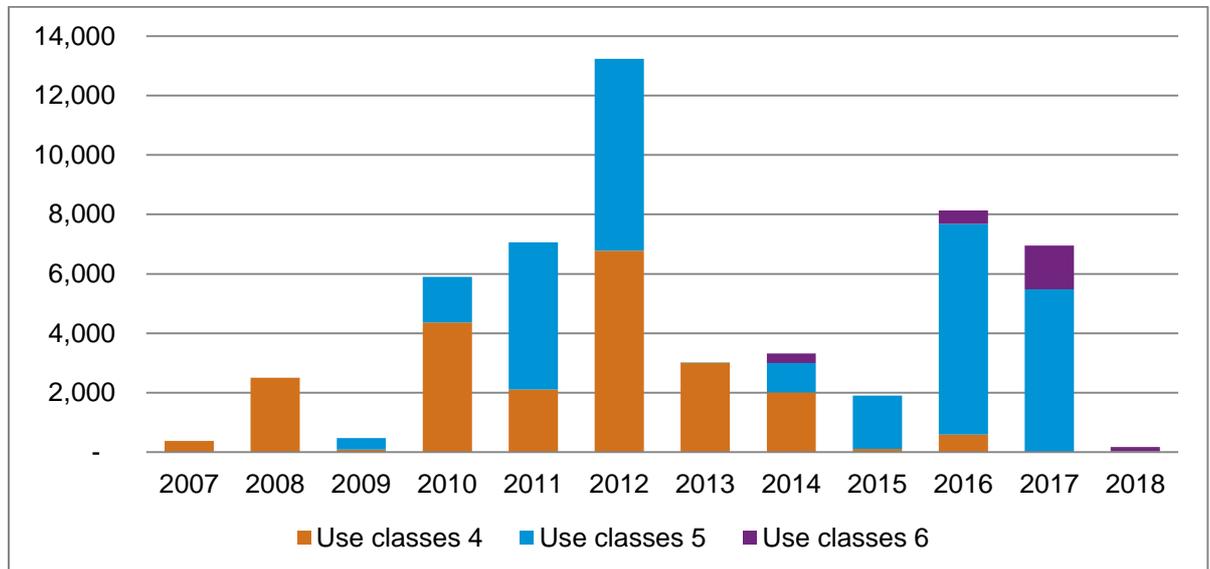
	Excluding Buffer 2018-38 (ha)	Buffer (sq m)	Including Buffer 2018-38 (sqm)	Including Buffer 2018-38 (ha)
Use Class 4ab	0.95	2.00	14,737	2.95
Use Class 4c and 5	-1.07	3.26	8,751	2.19
Use Class 6	2.55	0.27	11,297	2.82
Total	2.43	5.53	34,785	7.96

Source: OE and GL Hearn, 2018

Past Trends

- 7.37 As an alternative to labour demand forecasting, it is also possible to estimate future demand based on past trends. Unlike Labour Demand forecasting, the past take-up is based on actual delivery of employment development. Unfortunately the Council only monitors successful applications and not completions.
- 7.38 With that in mind, we have considered historic permission of employment floorspace in East Dunbartonshire based on gross permitted B class floorspace over the period from 2007 to 2018 based on the Council's monitoring data. Figure 15 shows the gross completion trends since 2012.
- 7.39 We have then taken only 25%-50% of this permitted growth as an assumed level of completions. Although somewhat an arbitrary figure, it is known, through local knowledge of the sites with planning permission, that many have not yet been built out and/or are unlikely to be.
- 7.40 The figure below demonstrates that permitted activity has fallen since the peak of 2012 although over the 2016 and 2017 period there was a notable upturn in permissions. There is also a notable slowing of office based development, but an increase in warehousing. Note that the permissions data does not split out use class 4 to a, b, and c.

Figure 17: Past gross Permissions in EDDC area 2007-2018



Source: Councils monitoring data

7.41 As set out above in Table 8 on average annual permissions have been around 4,800 sqm. If this trend is to be continued and built out over the whole 2018-28 period, then 96,000 sqm would be delivered over the next 20 years – translating into a land demand for East Dunbartonshire of 22.1 Ha of employment land.

Table 13: Employment Projections based on Gross Past Permissions

	Average Permissions (2007-18)	Trend Based Demand (2018-38) – Sq. m	Trend Based Demand (2018-38) - Ha
Use Class 4	1,996	39,925	8.0
Use Class 5	2,609	52,185	13.0
Use Class 6	218	4,355	1.1
Total	4,823	96,465	22.1

Source: Councils monitoring data – edited by GL Hearn

7.42 However, as we know, not all of this has or will be built out. If we make the assumption that only 25% of permissions have been built out then average annual completions would only have been around 1,200 sqm.

7.43 If this trend is to be continued and built out over the whole 2018-28 period, then 24,116 sqm would be delivered over the next 20 years – translating into a land demand for East Dunbartonshire of 5.5 Ha of employment land.

Table 14: Employment Projections based on 25% of permissions being built out

	Average Permissions (2007-18)	Trend Based Demand (2018-38) – Sq. m	Trend Based Demand (2018-38) - Ha
Use Class 4	499	9,981	2.0
Use Class 5	652	13,046	3.3
Use Class 6	55	1,089	0.3
Total	1,206	24,116	5.5

Source: Councils monitoring data – edited by GL Hearn

- 7.44 If we make the assumption that half of permissions will have been built out, then average annual completions would only have been around 2,400 sqm. If this trend is to be continued and built out over the whole 2018-28 period, 48,233 sqm would be delivered over the next 20 years – translating into a land demand for East Dunbartonshire of 11.1 Ha of employment land.

Table 15: Employment Projections based on 50% of permissions being built out

	Average Permissions (2007-18)	Trend Based Demand (2018-38) – Sq. m	Trend Based Demand (2018-38) - Ha
Use Class 4	998	19,963	4.0
Use Class 5	1,305	26,093	6.5
Use Class 6	109	2,178	0.6
Total	2,412	48,233	11.1

Source: Councils monitoring data – edited by GL Hearn

Overall Conclusions on Employment Land Needs

- 7.45 This section considers a range of approaches in estimating future employment floorspace need in East Dunbartonshire. The labour demand baseline scenario is based on the economic growth forecast produced by OE (baseline).
- 7.46 Based on this, GL Hearn took account of a range of locally specific growth drivers and prepared the Growth Scenario. This included consideration of economic demand drivers and past trends, as well as risks which could affect future economic growth.
- 7.47 This provides an evidenced justification for increasing employment growth above the baseline forecast. The majority of the identified growth sectors will not require Use Class 4 5 and 6 employment floorspace, although there is still a notable increase in the latter two of these.
- 7.48 We have also examined past permissions and made assumptions about the level of completions from this. The permission/completions analysis suggest that for office and factory floorspace the labour demand scenario are potentially under-estimating demand.

- 7.49 For warehousing space this is not the case as, despite a growing number of permissions of that type of property, even if this was built out in full, the labour demand scenarios still calculate a greater demand.
- 7.50 There has also been a notable down-turn in office floorspace, with some of the major sites not yet being built out. The same can also be said of some of the industrial sites (use class 4c and 5). In contrast, interest in warehousing floorspace has increased – although there is not a huge difference between the three forecasts.
- 7.51 We have therefore developed a hybrid approach, whereby we expect delivery of offices and factories based on the 50% permission/completions trend. As the recent trends show increasing interest in warehousing, we have taken the most positive of these, which is the growth scenario.

Table 16: Overall Employment Land Demand (2018-38)

Use Class	Trend Based 100%	Trend Based 50%	Trend Based 25%	Baseline Labour Demand	Growth Labour Demand	Hybrid
Office	8.0	4.0	2.0	2.83	2.95	4.0
Factory	13.0	6.5	3.3	0.55	2.19	6.5
Warehouse	1.1	0.6	0.3	1.70	2.82	2.82
Total	22.1	11.1	5.5	5.08	7.96	13.32

Source: Councils monitoring data, OE and GL Hearn.

- 7.52 As set out in the Table above, the hybrid scenario takes the overall need in East Dunbartonshire to 13.32 Ha of employment land over the 2018-38 period. The largest percentage of this is for factory floorspace, which includes light industrial uses.
- 7.53 In terms of floorspace this can be translated and rounded to around 57,400 sqm over the 2018-38 period. It can also be disaggregated to the following level of need:
- Use Class 4ab – 20,000 sq. m
 - Use Class 4c and 5 – 26,100 sq. m
 - Use Class 6 – 11,300 sq. m

Summary points

- 7.54 The findings herein are summarised below:
- We have developed a number of approaches to assessing future demand for employment floorspace and land in East Dunbartonshire.
 - The baseline economic forecasts predict minimal growth (960 jobs) in employment over the next 20 years.

- Taking the baseline forecasts as a start point we have calculated a growth scenario which takes into account local dynamics, which may result in a need above past trends. This results in an increase of 1,690 jobs.
- We have also examined trends in employment permissions, which show an average annual employment land permitted over the last 11 years in the region of 5,000 sq.m (although not all of these have been or will be built out). We have therefore made broad assumptions about the level of completions
- In translating these into employment land, we have taken account of the number of jobs which are likely to be part time, the amount of floorspace per job and the amount of land to accommodate that floorspace.
- We then developed a hybrid approach which took outputs from both the growth scenario and the past permission trends. This resulted in a need for some 57,400 square metres of employment floorspace, requiring 13.2 ha of land.

8 SUPPLY AND DEMAND BALANCE

8.1 This section of the report outlines the supply and demand balance of the sites assessed.

8.2 The table below reports the sites with identified supply in the form of intensification opportunity, redevelopment opportunity, vacant brownfield and vacant greenfield⁸. These sites are based on the sites that generated positive potential in the site assessment and total 90.85 Ha of potential supply.

Table 17: Opportunities for supply by site

Reference	Name	Type	(Ha)
2	Garscube Estate	Intensification Opportunity	0.19
4	Cloberfield IE	Intensification Opportunity	0.52
11	Huntershill Village - North	Intensification Opportunity	0.77
11	Huntershill Village - North	Intensification Opportunity	0.12
22	Lower Whitegates	Intensification Opportunity	0.46
26	Southbank Works West	Intensification Opportunity	4.15
30	Pit Road, Waterside	Redevelopment Opportunity	1.79
2	Garscube Estate	Vacant Brownfield	0.09
3	Garscadden Depot	Vacant Brownfield	2.51
4	Cloberfield IE	Vacant Brownfield	0.31
7	Bishopbriggs Industrial Estate	Vacant Brownfield	0.43
7	Bishopbriggs Industrial Estate	Vacant Brownfield	0.21
12	Low Moss Industrial Estate	Vacant Brownfield	0.27
13	Springfield House, St Mungo St	Vacant Brownfield	0.32
15	Westerhill Business Park North	Vacant Brownfield	2.21
16	Westerhill Business Park South	Vacant Brownfield	11.29
21	Kirkintilloch Industrial Estate East	Vacant Brownfield	0.40
22	Lower Whitegates	Vacant Brownfield	1.31
23	Kirkintilloch Industrial Estate West	Vacant Brownfield	0.45
26	Southbank Works West	Vacant Brownfield	4.15
27	Woodilee Industrial Estate - West	Vacant Brownfield	7.61
27	Woodilee Industrial Estate - East	Vacant Greenfield	1.21
27	Woodilee Industrial Estate - East	Vacant Greenfield	0.15
32	Badenheath	Vacant Greenfield	49.95

8.3 Some sites listed in the table above have been identified as intensification opportunities. In light of the nature of current operations on these sites, there may be barriers to intensifying these sites such as the requirement of occupiers for a particular industrial product and the compatibility of existing uses with others. These factors may influence the likelihood of these sites coming forward.

⁸ Intensification opportunity supports redevelopment at higher than existing densities, redevelopment opportunity refers to land with good existing potential to support new development, vacant brownfield relates to an urban site that is not in use or decaying with potential development and greenfield land refers to undeveloped land that is used for agriculture or natural landscape.

8.4 Notably, the Pit Road site has been identified as a redevelopment opportunity. As this site is also operational, it would only come forward as an opportunity for development if it becomes vacant.

8.5 Badenheath is a vacant greenfield site totalling 49.95 Ha in size. The site was historically recognised as greenbelt land in the East Dunbartonshire Council Local Plan, and allocated for business and employment site in the Local Development Plan (2017). However, development on this site has not come forward to date. Given this, the site will be excluded from the supply and demand assessment.

8.6 Table 18 below lists the brownfield and greenfield opportunity sites. Focussing on vacant brownfield sites on the basis of a brownfield first policy, the total supply opportunity equals 31.30 Ha. The list of brownfield sites in the table below excludes the St Mungo's Street site as it has been de-allocated from Council's list of allocated sites.

8.7 The Westerhill Business Park South site (11.29 Ha) is included as an opportunity site in the list of vacant brownfield sites in Table 18 below. This site has been vacant and marketed for some time. It is sizeable and upholds strong locational benefits, presenting the opportunity for flexibility in the type of development. As identified in the site assessment, the site could be considered for employment led mixed use development in the long term.

Table 18: Opportunities sites by brownfield sites

Reference	Name	Type	Area - Ha
3	Garscadden Depot	Vacant Brownfield	2.51
4	Cloberfield IE	Vacant Brownfield	0.31
7	Bishopbriggs Industrial Estate	Vacant Brownfield	0.43
7	Bishopbriggs Industrial Estate	Vacant Brownfield	0.21
12	Low Moss Industrial Estate	Vacant Brownfield	0.27
15	Westerhill Business Park North	Vacant Brownfield	2.21
16	Westerhill Business Park South	Vacant Brownfield	11.29
21	Kirkintilloch Industrial Estate East	Vacant Brownfield	0.40
22	Lower Whitegates	Vacant Brownfield	1.31
23	Kirkintilloch Industrial Estate West	Vacant Brownfield	0.45
26	Southbank Works West	Vacant Brownfield	4.15
27	Woodilee Industrial Estate - West	Vacant Brownfield	7.61
27	Woodilee Industrial Estate - East	Vacant Greenfield	1.21
27	Woodilee Industrial Estate - East	Vacant Greenfield	0.15

8.8 Removing the Westerhill Business Park South site from the list of brownfield opportunity sites in Table 18 results in a total of 19.86 Ha of vacant brownfield land. This compares to the identified need of 13.2 Ha.

Summary points

8.9 The findings herein are summarised below:

- Some sites have been identified with intensification opportunities, however the extent of their potential is reliant on the nature of current operations on the site as there may be occupiers that have specific locational requirements and need the space they operate in.
- Badenheath totals 49.95 hectares and, whilst recently allocated as a business and employment site, has not yet been developed and has been identified as a vacant greenfield site in the site assessment. It is therefore has been excluded from the supply assessment.
- The identified vacant brownfield sites contribute a large amount of development opportunities. Westerhill Business Park South has been marketed for some time with little market interest. The location and size of the site presents opportunities for employment led mixed use development.
- Removing the Westerhill Business Park South site from the list provides 19.86 Ha of vacant brownfield land, which is beyond the identified need of 13.2 Ha.

9 CONCLUSION AND RECOMMENDATIONS

9.1 We considered demand for employment land and floorspace over the period from 2018 to 2038. The analysis considers future employment land needs using the labour demand scenarios set out above and compares these against past permission trend data.

9.2 In terms of using a hybrid approach we identified an overall need for 57,400 sq.m. This translates into a need for around 13.3 Ha of employment land. The majority of this is for factory (light and general industrial) uses, with a modest requirement for office and minimal need for warehousing space.

Table 19: Employment Floorspace Requirements (sq m) 2016-2036

	Sq. M	Land Requirement
B1	20,000	4.0
B2	26,100	6.5
B8	11,300	2.82
B-Class Total	57,400	13.32

Source: GL Hearn, 2018

9.3 In contrast, our employment land survey identified a supply of up to 90.85 Ha of potential employment floorspace, albeit much of this is through vacant brownfield sites and some through intensification opportunities. Therefore, there is no requirement to identify additional employment land and some of the identified supply could be considered for alternative uses.

9.4 This is a fairly modest level of need and reflects the Council area's peripheral location in the City region and its role as a commuter suburb. East Dunbartonshire has regularly been recognised as an area with a high quality of life for its high employment, owner occupancy rate, generally good health and high educational results.

9.5 It also reflects competition from locations like Hillington which are much more accessible to the city centre, as well as being affordable for small and larger companies. It is therefore unlikely that East Dunbartonshire would compete with surrounding markets in the region.

9.6 A combination of strong competition from other markets in the City Region and changes to the way industries operate may influence opportunity for East Dunbartonshire to develop small business spaces and homeworking hubs. There has been some office development in Milngavie and Bearsden. If this trend becomes apparent, there may be the need to focus on niche or targeted office markets. This is something the Council could take on to understand the realistic demand for future office floorspace in the East Dunbartonshire market.

- 9.7 This study has identified a number of opportunity sites that provide capacity for the Council to meet the overall employment land need. Ensuring that sites with strong assets such as location, proximity to markets and size are the front leaders in employment land development is important.
- 9.8 This emphasises the role of the vacant brownfield sites in attracting investment. Of this supply, smaller industrial units of good quality and in accessible locations should be considered priorities for employment land development. This may require the Council to develop a strategy detailing the list of sites most appropriate to absorb short term employment land demand.
- 9.9 Further, brownfield vacant sites with development challenges and located in poor locations could be considered for alternative uses as the total supply of vacant brownfield sites equals 31.15 Ha, well above the identified need of 13.2 Ha.
- 9.10 It is critical that additional employment land is located within proximity to the strategic road network and to the local and regional markets it serves. It is recommended that the Council consider allocating some brownfield vacant sites that are not appropriate to support future employment land for other alternative uses.

APPENDIX A: Co-Star Market Report



Industrial Submarket Report

E/W Dunbartonshire Industrial

Glasgow Market

PREPARED BY



Nena Pavlidou
Senior Planner



INDUSTRIAL SUBMARKET REPORT

Submarket Key Statistics	2
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Rent & Vacancy	14
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Overview

E/W Dunbartonshire Industrial

12 Mo Deliveries in SF

0

12 Mo Net Absorption in SF

40.7 K

Vacancy Rate

1.9%

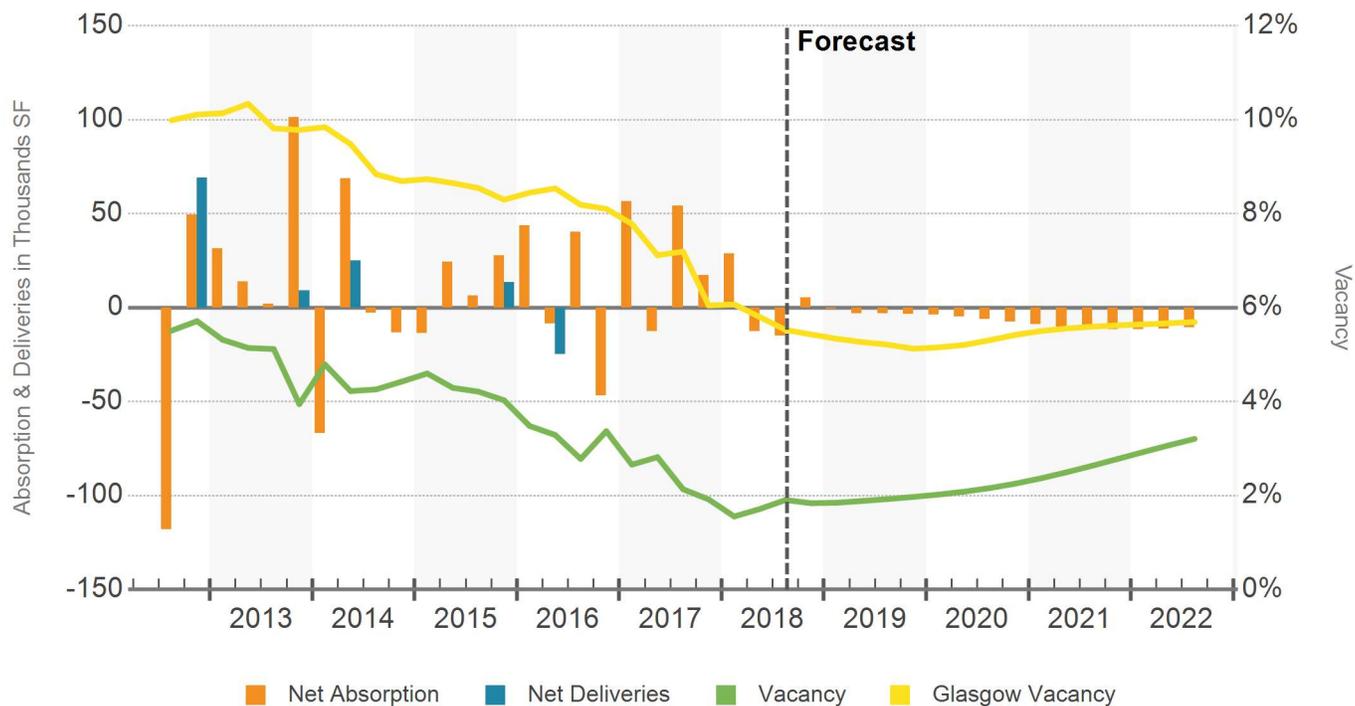
12 Mo Rent Growth

2.0%

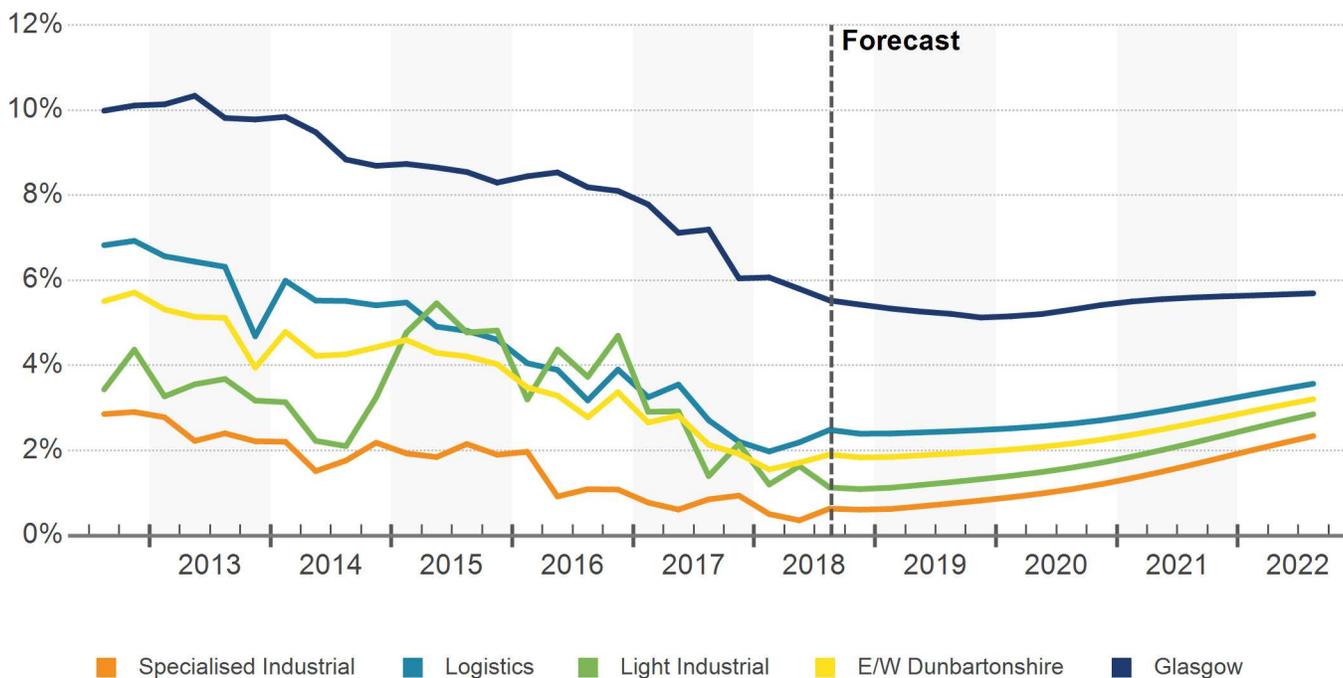
KEY INDICATORS

Current Quarter	GIA	Vacancy Rate	Asking Rent	Availability Rate	Net Absorption SF	Deliveries SF	Under Construction
Logistics	5,185,758	2.5%	£4.03	2.7%	(14,628)	0	0
Specialised Industrial	1,765,297	0.6%	£5.39	0.6%	(4,874)	0	0
Light Industrial	969,193	1.2%	£6.80	2.1%	3,929	0	0
Submarket	7,920,248	1.9%	£4.67	2.2%	(15,573)	0	0
Annual Trends	12 Month	Historical Average	Forecast Average	Peak	When	Trough	When
Vacancy Change (YOY)	-0.5%	3.3%	2.5%	7.2%	2005 Q2	0.5%	2007 Q4
Net Absorption SF	40.7 K	42,365	(24,665)	345,886	2007 Q3	(144,567)	2004 Q4
Deliveries SF	0	33,294	0	273,065	2012 Q4	0	2018 Q2
Rent Growth	2.0%	1.8%	1.2%	4.3%	2017 Q2	-0.7%	2010 Q1
Sales Volume	£1.7 M	£3.3 M	N/A	£32.7 M	2016 Q3	£45.0 K	2009 Q4

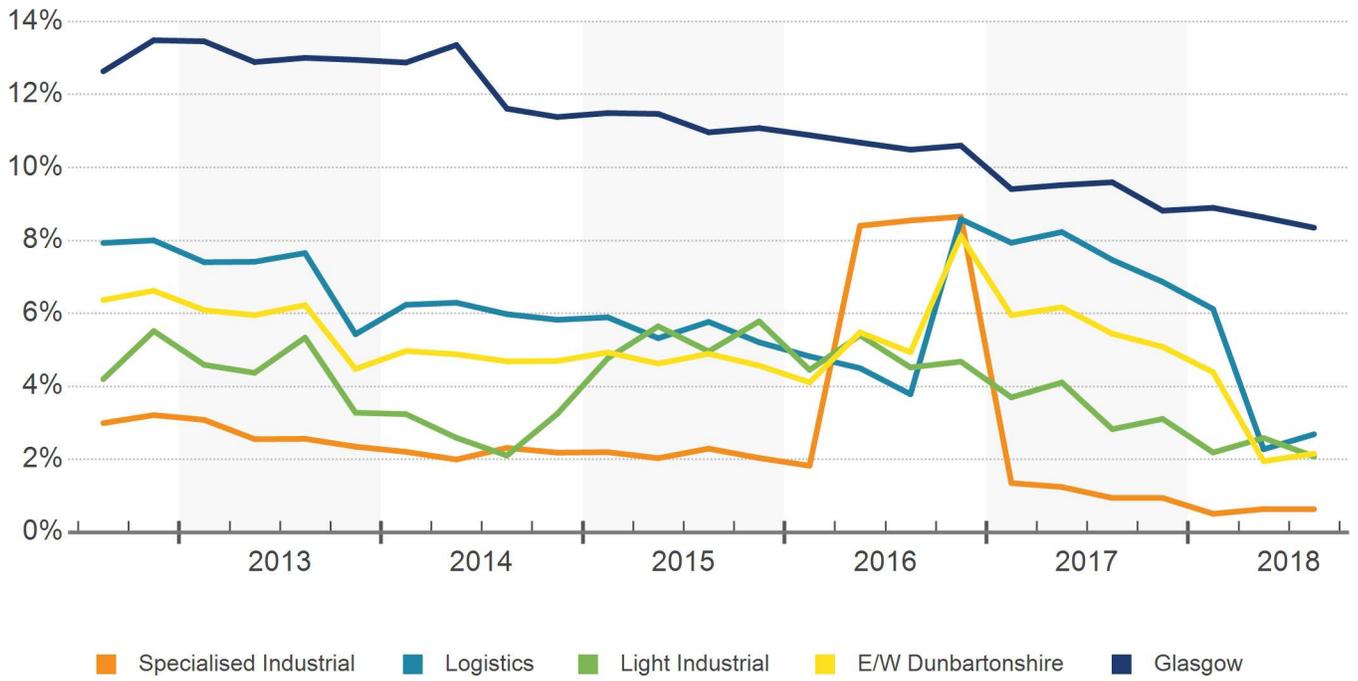
NET ABSORPTION, NET DELIVERIES & VACANCY



VACANCY RATE



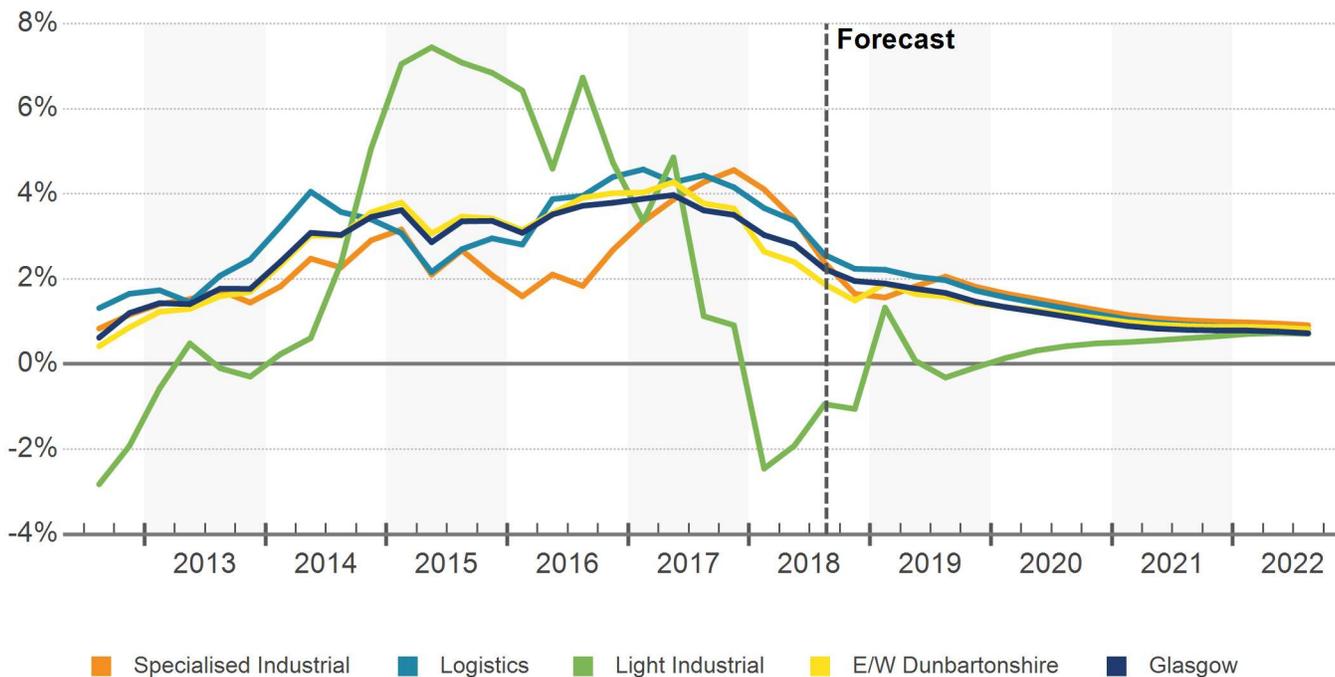
AVAILABILITY RATE



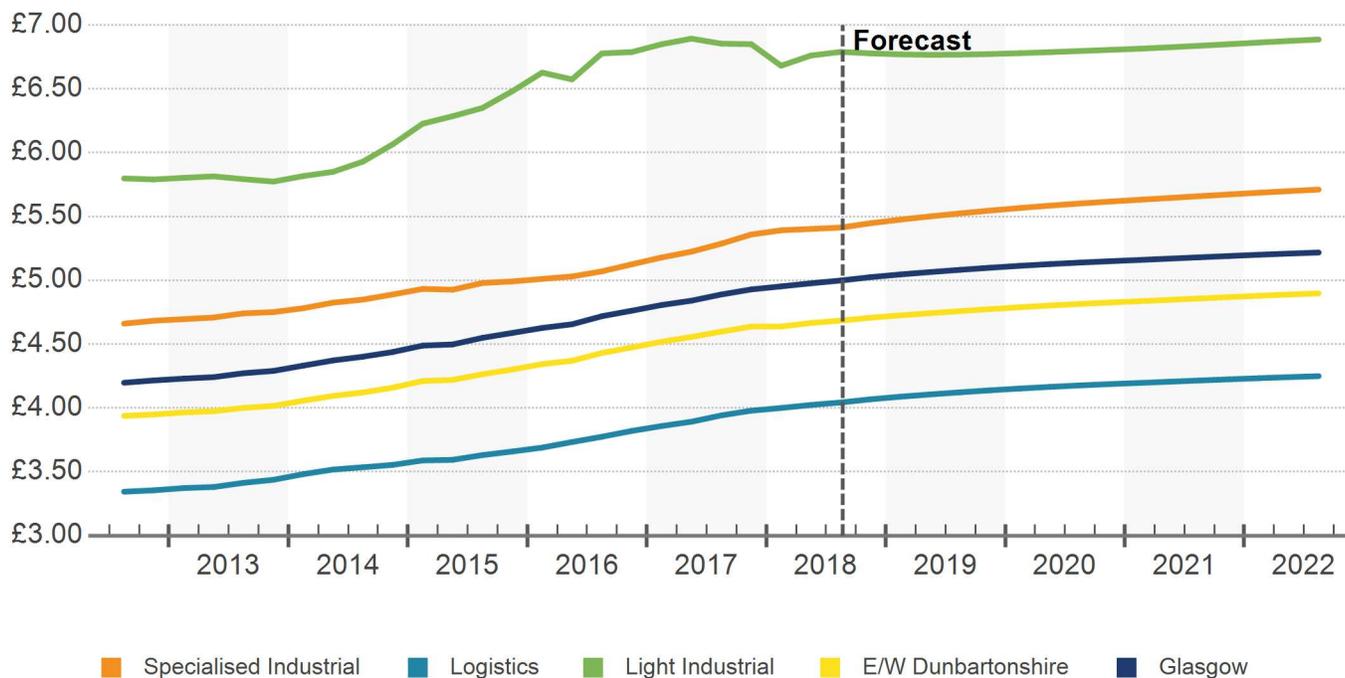
3 STAR MOST ACTIVE BUILDINGS IN SUBMARKET - PAST 12 MONTHS

Property Name/Address	Rating	GIA	Deals	SF	Vacancy (QTD)	Net Absorption SF (QTD)
Units 11-15 - Telford Court Clydebank Business Park	★ ★ ★ ★ ★	12,300	2	4,072	0%	4,072
Springfield Works 6 Emerson Rd	★ ★ ★ ★ ★	9,978	1	1,625	0%	1,625
Lennoxtown Enterprise Centre Station Rd	★ ★ ★ ★ ★	15,672	2	441	5.1%	441
Units 20 -30 Twechar Green Business Work...	★ ★ ★ ★ ★	13,683	2	3,951	15.6%	0
Unit 1-9 - Bleasdale Court Blo... Clydebank Business Park	★ ★ ★ ★ ★	108,773	1	12,245	26.9%	0
Units 6-9 Broadmeadow Industrial Estate	★ ★ ★ ★ ★	35,118	1	8,641	10.5%	0
Units 5-10 - Telford Court Clydebank Business Park	★ ★ ★ ★ ★	6,689	1	1,120	0%	0
Industrial Unit 588 Glasgow Rd	★ ★ ★ ★ ★	3,788	1	3,788	0%	0
Units 4-7 - Fleming Court Clydebank Business Park	★ ★ ★ ★ ★	4,306	1	1,026	47.2%	0
Unit 1-3 - Fleming Court Clydebank Business Park	★ ★ ★ ★ ★	6,490	1	1,991	0%	0
79 Milngavie Rd	★ ★ ★ ★ ★	8,730	1	1,641	0%	0
Units 12-17 Andrew Court	★ ★ ★ ★ ★	7,696	1	1,550	16.8%	0
Units 15-18 - Fleming Court Clydebank Business Park	★ ★ ★ ★ ★	4,212	1	1,054	24.1%	(1,014)

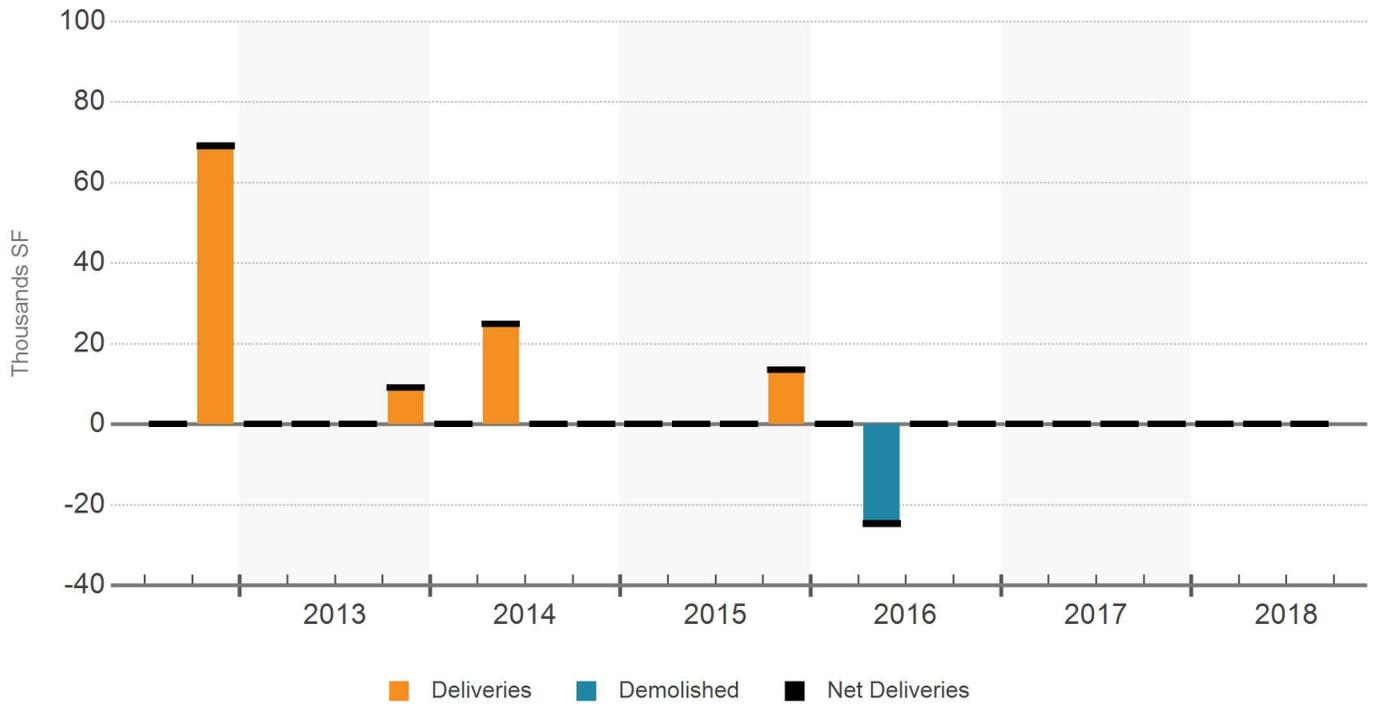
MARKET RENT GROWTH (YOY)



MARKET RENT PER SQUARE FOOT



DELIVERIES & DEMOLITIONS



All-Time Annual Avg. SF

920

Delivered SF Past 4 Qtrs

0

Delivered SF Next 4 Qtrs

0

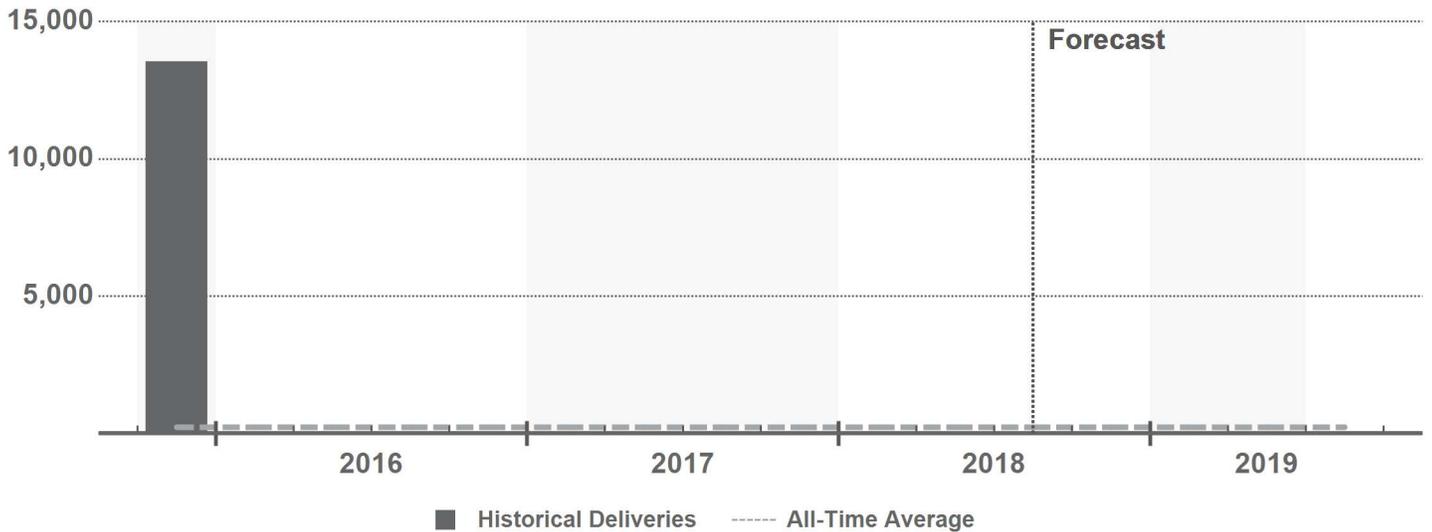
Proposed SF Next 4 Qtrs

0

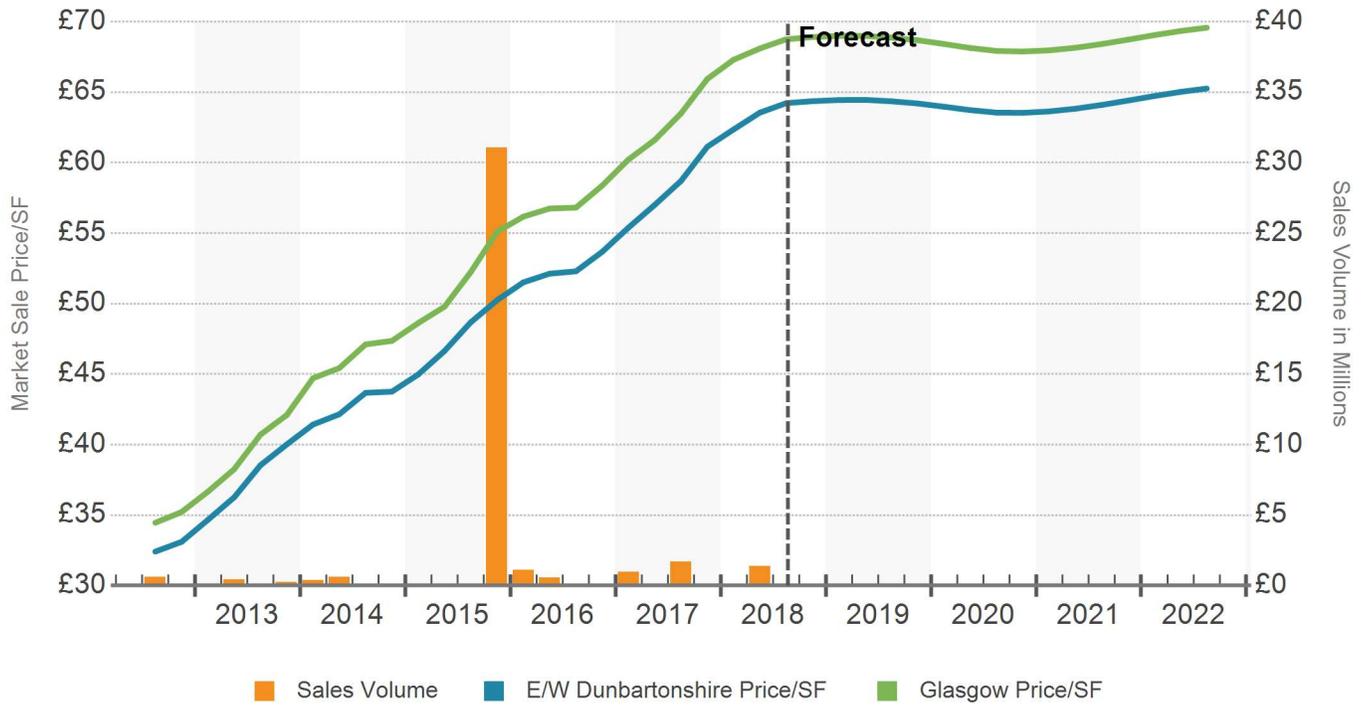
PAST 4 QUARTERS DELIVERIES, UNDER CONSTRUCTION, & PROPOSED



PAST & FUTURE DELIVERIES IN SQUARE FEET



SALES VOLUME & MARKET SALE PRICE PER SF



Sales Past 12 Months

E/W Dunbartonshire Industrial

Sale Comparables

7

Avg. Yield

12.8%

Avg. Price/SF

£6.24

Avg. Vacancy At Sale

0%

SALE COMPARABLE LOCATIONS



SALE COMPARABLES SUMMARY STATISTICS

Sales Attributes	Low	Average	Median	High
Sale Price	£15,500	£466,000	£632,500	£750,000
Price Per SF	£3.76	£6.24	£23	£42
Net Initial Yield	9.1%	12.8%	12.8%	16.6%
Time Since Sale in Months	2.5	6.5	3.8	11.7
Property Attributes	Low	Average	Median	High
Building SF	387	41,655	9,760	199,670
Eaves Height	11'4"	11'4"	11'4"	11'4"
Docks	0	0	0	0
Vacancy Rate At Sale	0%	0%	0%	0%
Year Built	1950	1971	1970	1988
Star Rating	★ ★ ★ ★ ★	★ ★ ★ ★ ★ 2.7	★ ★ ★ ★ ★	★ ★ ★ ★ ★

Sales Past 12 Months

E/W Dunbartonshire Industrial

RECENT SIGNIFICANT SALES

Property Name - Address	Property				Sale			
	Rating	Yr Built	Bldg SF	Vacancy	Sale Date	Price	Price/SF	NIY
1 Blocks 7-8 Stirling Rd	★★★★☆	1960	199,670	0%	30/04/2018	£750,000	£3.76	16.6%
2 25 South Douglas St	★★★★☆	1986	15,105	0%	25/05/2018	£632,500	£42	9.1%
3 Block 13 Symington Dr	★★★★☆	1987	60,890	0%	01/09/2017	£325,000	£5.34	-
4 26 Landsbury St	★★★★☆	1950	387	0%	16/11/2017	£15,500	£40	-
5 17 Cloberfield	★★★★☆	1988	26,481	0%	01/09/2017	-	-	-
6 51 Eastside	★★★★☆	1970	4,415	0%	01/05/2018	-	-	-
7 Dumbarton Rd	★★★★☆	-	3,872	0%	07/06/2018	-	-	-

Supply & Demand Trends

E/W Dunbartonshire Industrial

OVERALL SUPPLY & DEMAND

Year	Inventory			Net Absorption		
	SF	SF Growth	% Growth	SF	% of Inv	Construction Ratio
2022	7,920,248	0	0%	(43,818)	-0.6%	-
2021	7,920,248	0	0%	(41,625)	-0.5%	-
2020	7,920,248	0	0%	(22,444)	-0.3%	-
2019	7,920,248	0	0%	(10,552)	-0.1%	-
2018	7,920,248	0	0%	6,308	0.1%	0
YTD	7,920,248	0	0%	548	0%	0
2017	7,920,248	0	0%	115,030	1.5%	0
2016	7,920,248	(24,684)	-0.3%	28,408	0.4%	-
2015	7,944,932	13,559	0.2%	44,457	0.6%	0.3
2014	7,931,373	24,821	0.3%	(14,151)	-0.2%	-
2013	7,906,552	9,024	0.1%	148,132	1.9%	0.1
2012	7,897,528	273,065	3.6%	1,820	0%	150.0
2011	7,624,463	0	0%	(100,298)	-1.3%	-
2010	7,624,463	0	0%	147,392	1.9%	0
2009	7,624,463	34,855	0.5%	(38,935)	-0.5%	-
2008	7,589,608	0	0%	(111,916)	-1.5%	-
2007	7,589,608	0	0%	174,545	2.3%	0
2006	7,589,608	0	0%	283,472	3.7%	0

SPECIALISED INDUSTRIAL SUPPLY & DEMAND

Year	Inventory			Net Absorption		
	SF	SF Growth	% Growth	SF	% of Inv	Construction Ratio
2022	1,765,297	0	0%	(11,552)	-0.7%	-
2021	1,765,297	0	0%	(11,070)	-0.6%	-
2020	1,765,297	0	0%	(6,788)	-0.4%	-
2019	1,765,297	0	0%	(3,796)	-0.2%	-
2018	1,765,297	0	0%	5,823	0.3%	0
YTD	1,765,297	0	0%	5,398	0.3%	0
2017	1,765,297	0	0%	2,498	0.1%	0
2016	1,765,297	(8,834)	-0.5%	5,790	0.3%	-
2015	1,774,131	0	0%	5,011	0.3%	0
2014	1,774,131	0	0%	588	0%	0
2013	1,774,131	0	0%	12,215	0.7%	0
2012	1,774,131	203,989	13.0%	192,283	10.8%	1.1
2011	1,570,142	0	0%	(29,317)	-1.9%	-
2010	1,570,142	0	0%	11,495	0.7%	0
2009	1,570,142	0	0%	(11,801)	-0.8%	-
2008	1,570,142	0	0%	(9,231)	-0.6%	-
2007	1,570,142	0	0%	25,197	1.6%	0
2006	1,570,142	0	0%	155,907	9.9%	0

Supply & Demand Trends

E/W Dunbartonshire Industrial

LOGISTICS SUPPLY & DEMAND

Year	Inventory			Net Absorption		
	SF	SF Growth	% Growth	SF	% of Inv	Construction Ratio
2022	5,185,758	0	0%	(25,878)	-0.5%	-
2021	5,185,758	0	0%	(24,444)	-0.5%	-
2020	5,185,758	0	0%	(11,885)	-0.2%	-
2019	5,185,758	0	0%	(4,492)	-0.1%	-
2018	5,185,758	0	0%	(9,817)	-0.2%	-
YTD	5,185,758	0	0%	(13,843)	-0.3%	-
2017	5,185,758	0	0%	87,905	1.7%	0
2016	5,185,758	(15,850)	-0.3%	21,431	0.4%	-
2015	5,201,608	13,559	0.3%	54,683	1.1%	0.2
2014	5,188,049	24,821	0.5%	(14,013)	-0.3%	-
2013	5,163,228	0	0%	115,690	2.2%	0
2012	5,163,228	69,076	1.4%	(161,684)	-3.1%	-
2011	5,094,152	0	0%	(74,467)	-1.5%	-
2010	5,094,152	0	0%	130,291	2.6%	0
2009	5,094,152	13,683	0.3%	(64,911)	-1.3%	-
2008	5,080,469	0	0%	(77,701)	-1.5%	-
2007	5,080,469	0	0%	124,503	2.5%	0
2006	5,080,469	0	0%	119,885	2.4%	0

LIGHT INDUSTRIAL SUPPLY & DEMAND

Year	Inventory			Net Absorption		
	SF	SF Growth	% Growth	SF	% of Inv	Construction Ratio
2022	969,193	0	0%	(6,388)	-0.7%	-
2021	969,193	0	0%	(6,111)	-0.6%	-
2020	969,193	0	0%	(3,771)	-0.4%	-
2019	969,193	0	0%	(2,264)	-0.2%	-
2018	969,193	0	0%	10,302	1.1%	0
YTD	969,193	0	0%	8,993	0.9%	0
2017	969,193	0	0%	24,627	2.5%	0
2016	969,193	0	0%	1,187	0.1%	0
2015	969,193	0	0%	(15,237)	-1.6%	-
2014	969,193	0	0%	(726)	-0.1%	-
2013	969,193	9,024	0.9%	20,227	2.1%	0.4
2012	960,169	0	0%	(28,779)	-3.0%	-
2011	960,169	0	0%	3,486	0.4%	0
2010	960,169	0	0%	5,606	0.6%	0
2009	960,169	21,172	2.3%	37,777	3.9%	0.6
2008	938,997	0	0%	(24,984)	-2.7%	-
2007	938,997	0	0%	24,845	2.6%	0
2006	938,997	0	0%	7,680	0.8%	0

OVERALL RENT & VACANCY

Year	Asking Rent			Vacancy		
	Per SF	% Growth	Vs Hist Peak	SF	Percent	Ppts Chg
2022	£4.91	0.8%	5.5%	264,143	3.3%	0.6%
2021	£4.87	0.9%	4.7%	220,325	2.8%	0.5%
2020	£4.83	1.1%	3.9%	178,700	2.3%	0.3%
2019	£4.77	1.4%	2.9%	156,256	2.0%	0.1%
2018	£4.71	1.5%	1.5%	145,704	1.8%	-0.1%
YTD	£4.67	0.7%	0.7%	151,464	1.9%	0%
2017	£4.64	3.7%	0%	152,012	1.9%	-1.5%
2016	£4.47	4.0%	-3.7%	267,042	3.4%	-0.7%
2015	£4.30	3.4%	-7.8%	320,134	4.0%	-0.4%
2014	£4.16	3.6%	-11.5%	351,032	4.4%	0.5%
2013	£4.02	1.7%	-15.5%	312,060	3.9%	-1.8%
2012	£3.95	0.9%	-17.4%	451,168	5.7%	3.4%
2011	£3.92	0.3%	-18.5%	179,923	2.4%	1.3%
2010	£3.90	-0.1%	-18.8%	79,625	1.0%	-1.9%
2009	£3.91	-0.5%	-18.7%	227,017	3.0%	1.0%
2008	£3.93	0.3%	-18.1%	153,227	2.0%	1.5%
2007	£3.91	1.8%	-18.5%	41,311	0.5%	-2.3%
2006	£3.85	1.8%	-20.6%	215,856	2.8%	-3.7%

SPECIALISED INDUSTRIAL RENT & VACANCY

Year	Asking Rent			Vacancy		
	Per SF	% Growth	Vs Hist Peak	SF	Percent	Ppts Chg
2022	£5.72	0.9%	6.3%	44,007	2.5%	0.7%
2021	£5.67	1.0%	5.5%	32,455	1.8%	0.6%
2020	£5.62	1.3%	4.6%	21,385	1.2%	0.4%
2019	£5.55	1.8%	3.4%	14,597	0.8%	0.2%
2018	£5.45	1.7%	1.6%	10,801	0.6%	-0.3%
YTD	£5.39	0.6%	0.6%	11,226	0.6%	-0.3%
2017	£5.36	4.6%	0%	16,624	0.9%	-0.1%
2016	£5.13	2.7%	-4.6%	19,122	1.1%	-0.8%
2015	£4.99	2.1%	-7.4%	33,746	1.9%	-0.3%
2014	£4.89	2.9%	-9.6%	38,757	2.2%	0%
2013	£4.75	1.4%	-12.8%	39,345	2.2%	-0.7%
2012	£4.68	1.2%	-14.4%	51,560	2.9%	0.4%
2011	£4.63	0.8%	-15.7%	39,854	2.5%	1.9%
2010	£4.59	1.1%	-16.7%	10,537	0.7%	-0.7%
2009	£4.55	0.2%	-17.9%	22,032	1.4%	0.8%
2008	£4.54	1.2%	-18.1%	10,231	0.7%	0.6%
2007	£4.48	2.8%	-19.5%	1,000	0.1%	-1.6%
2006	£4.36	3.3%	-22.9%	26,197	1.7%	-9.9%

LOGISTICS RENT & VACANCY

Year	Asking Rent			Vacancy		
	Per SF	% Growth	Vs Hist Peak	SF	Percent	Ppts Chg
2022	£4.26	0.8%	6.5%	190,992	3.7%	0.5%
2021	£4.22	0.9%	5.8%	165,114	3.2%	0.5%
2020	£4.19	1.2%	5.0%	140,670	2.7%	0.2%
2019	£4.14	1.7%	3.9%	128,785	2.5%	0.1%
2018	£4.07	2.2%	2.2%	124,293	2.4%	0.2%
YTD	£4.03	1.2%	1.2%	128,319	2.5%	0.3%
2017	£3.98	4.2%	0%	114,476	2.2%	-1.7%
2016	£3.82	4.4%	-4.2%	202,381	3.9%	-0.7%
2015	£3.66	3.0%	-8.7%	239,662	4.6%	-0.8%
2014	£3.55	3.4%	-11.9%	280,786	5.4%	0.7%
2013	£3.44	2.5%	-15.8%	241,952	4.7%	-2.2%
2012	£3.36	1.7%	-18.6%	357,642	6.9%	4.4%
2011	£3.30	1.0%	-20.6%	126,882	2.5%	1.5%
2010	£3.27	0.5%	-21.7%	52,415	1.0%	-2.6%
2009	£3.25	-1.0%	-22.3%	182,706	3.6%	1.5%
2008	£3.29	0.5%	-21.0%	104,112	2.0%	1.5%
2007	£3.27	2.1%	-21.7%	26,411	0.5%	-2.5%
2006	£3.20	1.5%	-24.2%	150,914	3.0%	-2.4%

LIGHT INDUSTRIAL RENT & VACANCY

Year	Asking Rent			Vacancy		
	Per SF	% Growth	Vs Hist Peak	SF	Percent	Ppts Chg
2022	£6.90	0.7%	0.7%	29,144	3.0%	0.7%
2021	£6.85	0.7%	0%	22,756	2.3%	0.6%
2020	£6.81	0.5%	-0.7%	16,645	1.7%	0.4%
2019	£6.77	-0.1%	-1.1%	12,874	1.3%	0.2%
2018	£6.78	-1.1%	-1.1%	10,610	1.1%	-1.1%
YTD	£6.80	-0.8%	-0.8%	11,919	1.2%	-0.9%
2017	£6.85	0.9%	0%	20,912	2.2%	-2.5%
2016	£6.79	4.7%	-0.9%	45,539	4.7%	-0.1%
2015	£6.48	6.8%	-5.7%	46,726	4.8%	1.6%
2014	£6.07	5.1%	-12.9%	31,489	3.2%	0.1%
2013	£5.77	-0.3%	-18.6%	30,763	3.2%	-1.2%
2012	£5.79	-1.9%	-18.3%	41,966	4.4%	3.0%
2011	£5.90	-2.4%	-16.0%	13,187	1.4%	-0.4%
2010	£6.05	-3.1%	-13.3%	16,673	1.7%	-0.6%
2009	£6.24	0%	-9.8%	22,279	2.3%	-1.8%
2008	£6.24	-1.2%	-9.8%	38,884	4.1%	2.7%
2007	£6.32	-0.4%	-8.4%	13,900	1.5%	-2.6%
2006	£6.34	0.6%	-8.0%	38,745	4.1%	-0.8%

OVERALL SALES

Year	Completed Transactions (1)						Market Pricing Trends (2)		
	Deals	Volume	Turnover	Avg Price	Avg Price/SF	Avg Yield	Price/SF	Price Index	Yield
2022	-	-	-	-	-	-	£65.49	194	7.7%
2021	-	-	-	-	-	-	£64.40	191	7.7%
2020	-	-	-	-	-	-	£63.53	188	7.7%
2019	-	-	-	-	-	-	£64.19	190	7.5%
2018	-	-	-	-	-	-	£64.36	191	7.2%
YTD	4	£1.4 M	2.8%	£691,250	£6.44	12.8%	£63.72	189	7.1%
2017	9	£2.8 M	2.7%	£392,879	£14.60	-	£61.13	181	7.1%
2016	5	£1.7 M	0.6%	£514,333	£37.44	14.2%	£53.67	159	7.6%
2015	11	£31.1 M	10.7%	£3,385,048	£36.55	10.5%	£50.25	149	7.6%
2014	5	£1.1 M	0.9%	£194,000	£14.71	-	£43.76	130	8.2%
2013	4	£0.7 M	0.3%	£250,000	£35.79	-	£40.01	119	8.5%
2012	7	£2.0 M	0.7%	£383,300	£36.74	11.2%	£33.11	98	10.2%
2011	3	£0.5 M	0.5%	£247,090	£13.62	13.6%	£32.82	97	10.3%
2010	2	£0.1 M	2.8%	£120,000	£12.39	-	£35.36	105	9.7%
2009	1	£0.0 M	0.2%	£45,000	£2.85	-	£32.68	97	10.5%
2008	2	£1.1 M	0.8%	£527,000	£17.44	-	£33.74	100	10.4%
2007	2	£1.1 M	0.4%	£550,000	£38.45	-	£41.64	123	8.5%

(1) Completed transaction data is based on actual arms-length sales transactions and levels are dependent on the mix of what happened to sell in the period.

(2) Market price trends data is based on the estimated price movement of all properties in the market, informed by actual transactions that have occurred.

SPECIALISED INDUSTRIAL SALES

Year	Completed Transactions (1)						Market Pricing Trends (2)		
	Deals	Volume	Turnover	Avg Price	Avg Price/SF	Avg Yield	Price/SF	Price Index	Yield
2022	-	-	-	-	-	-	£67.28	205	7.5%
2021	-	-	-	-	-	-	£66.12	201	7.5%
2020	-	-	-	-	-	-	£65.16	198	7.5%
2019	-	-	-	-	-	-	£65.75	200	7.2%
2018	-	-	-	-	-	-	£65.71	200	7.0%
YTD	-	-	-	-	-	-	£64.93	198	6.9%
2017	2	£0.4 M	0.6%	£187,750	£37.09	-	£62.13	189	6.9%
2016	3	£0.6 M	0.9%	£271,500	£40.58	14.9%	£54.34	165	7.3%
2015	4	£0.4 M	0.7%	£90,392	£30.88	12.1%	£50.66	154	7.3%
2014	-	-	-	-	-	-	£45.00	137	7.8%
2013	1	£0.0 M	0.1%	-	£18.64	-	£39.90	121	8.2%
2012	3	£0.3 M	0.6%	£133,250	£29.53	-	£33.15	101	9.8%
2011	-	-	-	-	-	-	£32.96	100	9.9%
2010	1	£0.1 M	0.6%	£120,000	£12.39	-	£35.35	108	9.3%
2009	-	-	-	-	-	-	£32.00	97	10.2%
2008	-	-	-	-	-	-	£32.87	100	10.1%
2007	-	-	-	-	-	-	£40.83	124	8.3%

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(2) Market price trends data is based on the estimated price movement of all properties in the market, informed by actual transactions that have occurred.

LOGISTICS SALES

Year	Completed Transactions (1)						Market Pricing Trends (2)		
	Deals	Volume	Turnover	Avg Price	Avg Price/SF	Avg Yield	Price/SF	Price Index	Yield
2022	-	-	-	-	-	-	£62.72	195	7.8%
2021	-	-	-	-	-	-	£61.68	192	7.8%
2020	-	-	-	-	-	-	£60.84	189	7.8%
2019	-	-	-	-	-	-	£61.43	191	7.5%
2018	-	-	-	-	-	-	£61.44	191	7.3%
YTD	4	£1.4 M	4.3%	£691,250	£6.44	12.8%	£60.70	189	7.2%
2017	4	£1.1 M	3.4%	£410,000	£7.55	-	£58.11	181	7.2%
2016	1	£1.0 M	0.5%	£1,000,000	£36.14	12.7%	£50.98	159	7.7%
2015	5	£30.2 M	15.9%	£6,033,049	£36.50	10.4%	£47.98	149	7.7%
2014	3	£0.9 M	1.2%	£246,000	£13.74	-	£41.72	130	8.3%
2013	1	£0.4 M	0.2%	-	£38.42	-	£38.75	121	8.6%
2012	2	£1.2 M	0.6%	£600,000	£40.96	11.2%	£31.96	100	10.3%
2011	2	£0.4 M	0.5%	£350,000	£17.12	-	£31.55	98	10.4%
2010	1	£0 M	3.9%	-	-	-	£33.79	105	9.8%
2009	-	-	-	-	-	-	£31.10	97	10.7%
2008	2	£1.1 M	1.2%	£527,000	£17.44	-	£32.12	100	10.6%
2007	1	£1.0 M	0.3%	£1,050,000	£82.10	-	£39.46	123	8.7%

(1) Completed transaction data is based on actual arms-length sales transactions and levels are dependent on the mix of what happened to sell in the period.

(2) Market price trends data is based on the estimated price movement of all properties in the market, informed by actual transactions that have occurred.

LIGHT INDUSTRIAL SALES

Year	Completed Transactions (1)						Market Pricing Trends (2)		
	Deals	Volume	Turnover	Avg Price	Avg Price/SF	Avg Yield	Price/SF	Price Index	Yield
2022	-	-	-	-	-	-	£77.06	175	7.8%
2021	-	-	-	-	-	-	£75.84	172	7.8%
2020	-	-	-	-	-	-	£74.98	170	7.7%
2019	-	-	-	-	-	-	£76.17	173	7.5%
2018	-	-	-	-	-	-	£77.48	176	7.2%
YTD	-	-	-	-	-	-	£77.67	176	7.2%
2017	3	£1.3 M	3.0%	£580,886	£43.39	-	£75.44	171	7.2%
2016	1	£0.1 M	0.2%	-	£31.92	-	£66.87	152	7.6%
2015	2	£0.6 M	1.4%	£29,008	£44.34	9.4%	£61.58	140	7.6%
2014	2	£0.2 M	0.8%	£90,000	£22.35	-	£52.39	119	8.3%
2013	2	£0.2 M	1.0%	£250,000	£37.17	-	£46.97	107	8.7%
2012	2	£0.5 M	1.6%	£450,000	£33.30	-	£39.14	89	10.3%
2011	1	£0.1 M	1.7%	£144,181	£8.71	13.6%	£39.32	89	10.4%
2010	-	-	-	-	-	-	£43.76	99	9.6%
2009	1	£0.0 M	1.6%	£45,000	£2.85	-	£42.36	96	10.2%
2008	-	-	-	-	-	-	£44.03	100	10.0%
2007	1	£0.0 M	1.7%	£50,000	£3.16	-	£54.82	124	8.2%

(1) Completed transaction data is based on actual arms-length sales transactions and levels are dependent on the mix of what happened to sell in the period.

(2) Market price trends data is based on the estimated price movement of all properties in the market, informed by actual transactions that have occurred.