

Background Paper
Industry and Business Survey



1. Introduction

- 1.1 This monitoring report details the land supply for industrial and business uses, provides details of the take up of land for these uses and the development of land for industry and business in Renfrewshire. The base date for this analysis of the industrial and business land supply is 31 March 2012.

2. Strategic Economic Investment Locations

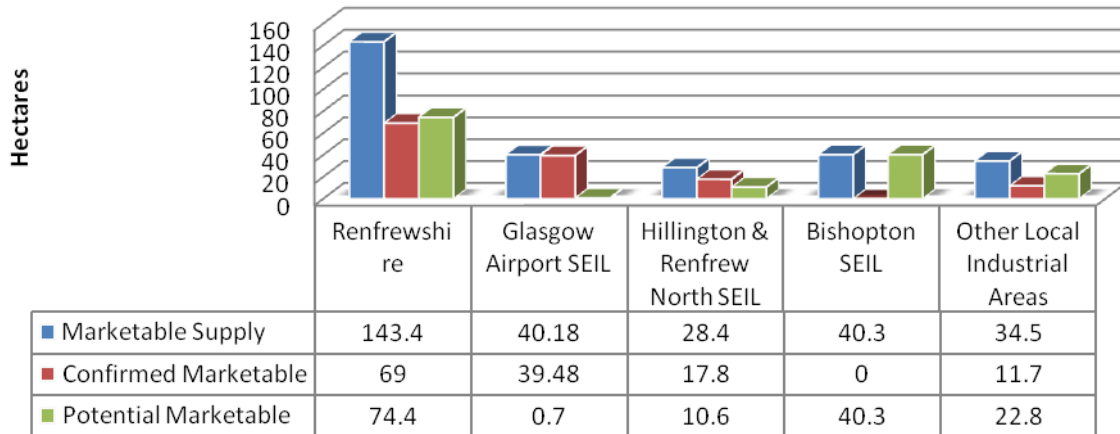
- 2.1 The Glasgow and Clyde Valley Strategic Development Plan (GCVSDP) identifies 20 Strategic Economic Investment Location's (SEIL's) to support the Scottish Government's key sectors, Scottish Enterprise locational priorities and the growth in rebalancing economic sectors. As strategic priorities, SEIL's represent the city-region's strategic response to long-term sustainable economic growth. The GCVSDP identifies three SEIL's within Renfrewshire (See Appendix 1 for maps of the SEIL's):

- **Hillington / Renfrew North** is identified as a Safeguarded Strategic Economic Investment Location to ensure that there is adequate land for business and financial services as well as other functions such as distribution and logistics; and,
- **Bishopton and Glasgow International Airport Zone** (Glasgow Airport, Cart Corridor, Inchinnan, Linwood, Westway) are promoted as Opportunity Strategic Economic Investment locations for a range of functions including business and financial services, distribution and logistics, life sciences and green technologies.

3. Marketable Industrial Land Supply

- 3.1 The marketable, industrial land supply for Renfrewshire at March 2012 amounted to a total of 143.4 hectares (ha). The supply comprises of 48 sites (See Appendix 2 for industrial land supply definitions and Appendix 3 for details and maps of the sites).
- 3.2 The overall amount of marketable land within Renfrewshire has remained relatively static in recent years. A comprehensive review of Renfrewshire's marketable land is currently being undertaken in preparation of the forthcoming Renfrewshire Local Development Plan (LDP) and 69.6ha of land has been removed from the marketable supply, however, over 40ha of marketable land, which comprises the Bishopton SEIL, has recently been added to the supply.

Marketable Land Supply



Source: Renfrewshire Council Planning & Transport Services 2012

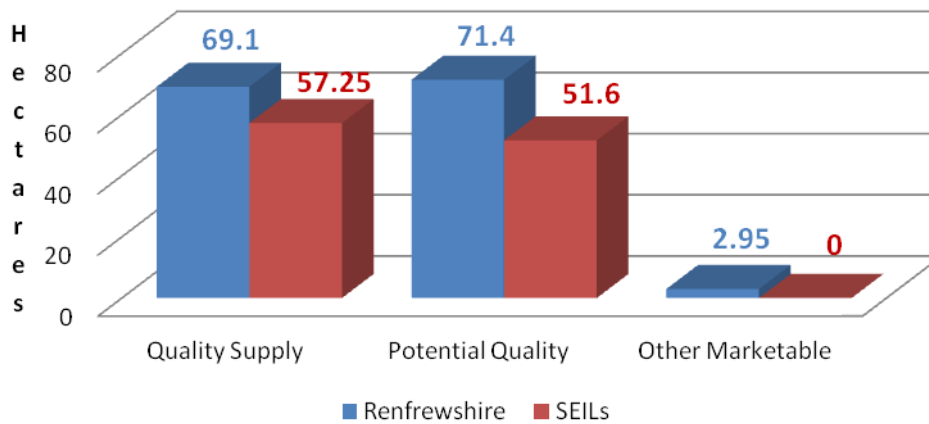
Figure 1 – Renfrewshire’s Marketable Industrial and Business Land Supply 2012

- 3.3 The Glasgow Airport Zone has the largest marketable land supply (40.18ha). Bishopton SEIL has 40.3ha of potential marketable land which reflects the potential offered by the development of the former Royal Ordnance Factory site to create Bishopton Community Growth Area. In terms of both confirmed and potential marketable land, the supply within the Hillington and Renfrew North SEIL amounts to 28.4ha.

4. Quality Assessment

- 4.1 This is a refinement of the marketable supply and represents that element of the supply which has been assessed as having high environmental quality, good access to the strategic transport network and flexibility in meeting a range of user requirements. The quality supply represents the most competitive industrial and business locations.
- 4.2 The assessment identifies 69.1ha as quality sites, 71.4ha as potential quality sites and 2.95ha as other marketable land. 83% of Renfrewshire’s quality sites are within the Glasgow Airport Zone SEIL and the Hillington and Renfrew North SEIL.

Marketable Land Supply - Quality Assessment



Source: Renfrewshire Council Planning & Transport Services 2012

Figure 2 – Renfrewshire’s Marketable Industrial and Business Land Supply 2012 – Quality Assessment

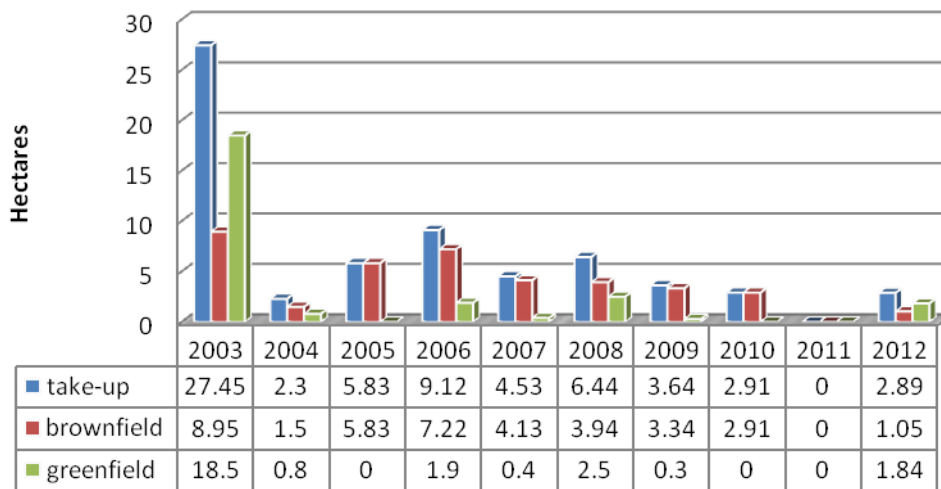
5. Non-Marketable Industrial Land Supply

5.1 The non-marketable industrial land supply comprises land zoned for industry, categorised in terms of sites that are suitable for local industrial uses or reserved for expansion. The supply amounts to 13.8 ha of non marketable industrial land and 69.6 ha of land which has had its industrial status reviewed in preparation of the LDP. (See Appendix 3 for details and maps of the sites).

6. Land Take-Up Trends

6.1 Between April 2011 - March 2012, 2.89ha of land was developed for new build industrial and business developments. Renfrewshire has had modest levels of industrial and business land take-up in the last 5 years with the average being 3.2ha. However, the take-up this year does represent an improvement on the previous year when there was no new build industrial and business developments within Renfrewshire. There has also been some industrial and business development activity during this period which focused on extensions to existing properties and developments within the site envelope of existing industrial and business uses, however, this activity is not included in the total take-up figure.

Industrial and Business Land Take-up 2003-2012



Source: Renfrewshire Council Planning & Transport Services 2012

Figure 3 – Industrial and Business Land Take-up within Renfrewshire 2012

- 6.2 Between 2003 - 2012, take-up has largely been concentrated in the Glasgow Airport Zone and Hillington & Renfrew North SEIL's with the majority of development taking place within the business parks at Inchinnan, Linwood and Hillington.
- 6.3 60% of take-up in the last 10 years was on brownfield sites and 40% on greenfield land. The relatively high greenfield percentage reflects the development of some 16 ha of greenfield land at Inchinnan by Rolls Royce in 2003. Development trends over the past five years indicate 71% of land take-up has been on brownfield sites.
- 6.4 An estimate of the ten year demand for industrial land can be made based on the last five years' take-up multiplied by two in order to ensure that the most recent trends are recognised. On this basis, the ten year demand estimate for Renfrewshire is 31.76 ha. It should be noted that the take-up in Renfrewshire during the last 10 years is more than double this estimate and amounts to 65.11 ha.
- 6.5 There is a high degree of uncertainty attached to projections of past industrial performance to estimate future demand and these are not the sole determinant of requirements. The supply is required to be sufficiently flexible to reflect opportunities for development and to take account of forecasts of economic growth.

7. Development Potential

- 7.1 In addition to the analysis of historic industrial land take-up rates referred to above, an indication of demand for industrial land in the short term may also be gauged by reference to planning consents not yet implemented. In total, proposed developments with detailed

planning consents for Use Classes 4, 5, and 6, not started at March 2012, amount to some 88,470 square metres of floorspace. This represents a potential land take-up of 23.6 ha.

8. Strategic Economic Investment Locations

Glasgow Airport Zone

- 8.1 The estate has 6.7 ha. of marketable land. There has been a substantial programme of refurbishment of existing units (over 130,000 square metres) within the estate over recent years.
- 8.2 In 2010 a masterplan for the development of Westway was submitted by Westway LP. The masterplan seeks to undertake significant expansion of the industrial park, building on the opportunities presented by the proximity of the site to both Glasgow Airport and the White Cart River. In particular, the masterplan provides for major infrastructure investment, including a new surface road bridge to link with Glasgow Airport and the significant refurbishment of existing river infrastructure to maximise the potential for water based transportation. A similar masterplan for Westway was previously granted outline planning consent by Renfrewshire Council in 2007.
- 8.3 WB Westway has secured £500,000 to support the development of the strategic dock at Westway to create a key manufacturing location for renewable energy. This will support work to dredge the dock area, create a navigable channel on the River Cart and deliver quayside improvements to allow loadings from heavy components manufactured on site for the offshore renewables sector. The improvements have the potential to accelerate the development of the masterplan which could see up to £70 million invested in the area over the next decade.
- 8.4 Steel Engineering, a company based at Westway, have announced a £3m investment in the expansion of their business - creating 120 jobs - to service the 'clean' energy sectors. Steel Engineering recently completed a trial using the River Cart to transport barges loaded with huge steel spools weighing 80 tonnes, for the first leg of their 600-mile journey around the coast of Scotland to Newcastle-upon-Tyne. The size and shape of the goods prevent them from being transported to their final destination by road therefore the upgraded dock facility was key to the expansion of this company.

Inchinnan Business Park

- 8.5 The marketable industrial land supply within the business park amounts to some 10.4 ha. There has been substantial development at Inchinnan in recent years. Major developments have included the refurbishment of the India Tyres building and the relocation of Rolls Royce. In 2010 work was completed on the development of the University of Strathclyde's new Advanced Forming Metallurgy Research Centre and proposals have been submitted to the Council to extend this facility (2800 sqm).

- 8.6 The Scottish biotech facility of US Life Technologies has secured a £12.5m investment to expand manufacturing at Inchinnan to meet the rising demand for cell culture products used for drug research, development and production. This planned investment together with other activity within the business park, including the current expansion of Peak Scientific which will more the double the size of the plant, illustrates the continued draw of inchinnan and the critical role that the business park will play in realising the economic potential of the Glasgow Airport Zone (GAZ).

Linwood

- 8.7 There is a total of 23.08 ha. of marketable land, divided between Linwood North/ the Phoenix Park and Linwood South/ Burnbrae Industrial Estate. Approval was granted in 2008 for an outline application for a mixed use development comprising Classes, 4, 5 and 6 (24 ha). The proposal will involve some loss of industrial land for residential development, however, this will assist in funding the significant infrastructure costs associated with the industrial development. Miller Developments Regeneration Ltd have submitted a planning application for land remediation, platform creation and installation of drainage infrastructure associated with the residential element of the mixed development.

Hillington and Renfrew North

- 8.8 The Hillington estate is Scotland's largest business park. The estate currently has some 27.4ha of marketable industrial land within Renfrewshire Council boundaries. Detailed permission was granted in 2008 for the development of 7,025 square metres (sqm) of business floorspace on the M8 frontage. Significant progress has been made on redevelopment of the former Rolls Royce premises with the development of the Pegasus Business Park by St Modwen and Northpoint by Affinity Property Partners. Work has started on clearing the remainder of the former Rolls Royce site which will provide approximately 10.5ha of land at the heart of the Hillington estate.
- 8.9 In recent years the Titanium Business Park at Renfrew North has been expanded with the development of two office Pavilions creating 7522 sqm of Class 4 office floorspace. One of the new office pavilions is still to be let, however, the majority of the floorspace at Titanium Business Park is now occupied. Further land is still available in this area for office/business developments.

Bishopton Community Growth Area

- 8.10 The development of 138,000sqm of business and industrial floorspace, approved as part of the masterplan, is key to the delivery of the Community Growth Area. The development of all serviced land for business and employment use is programmed for completion in 2027 with approximately 40ha developed. At completion of the project, a high quality and highly accessible business park will be developed which will be well located to support growth within the business services sector.

Glasgow Airport and Cart Corridor Local Industrial Area

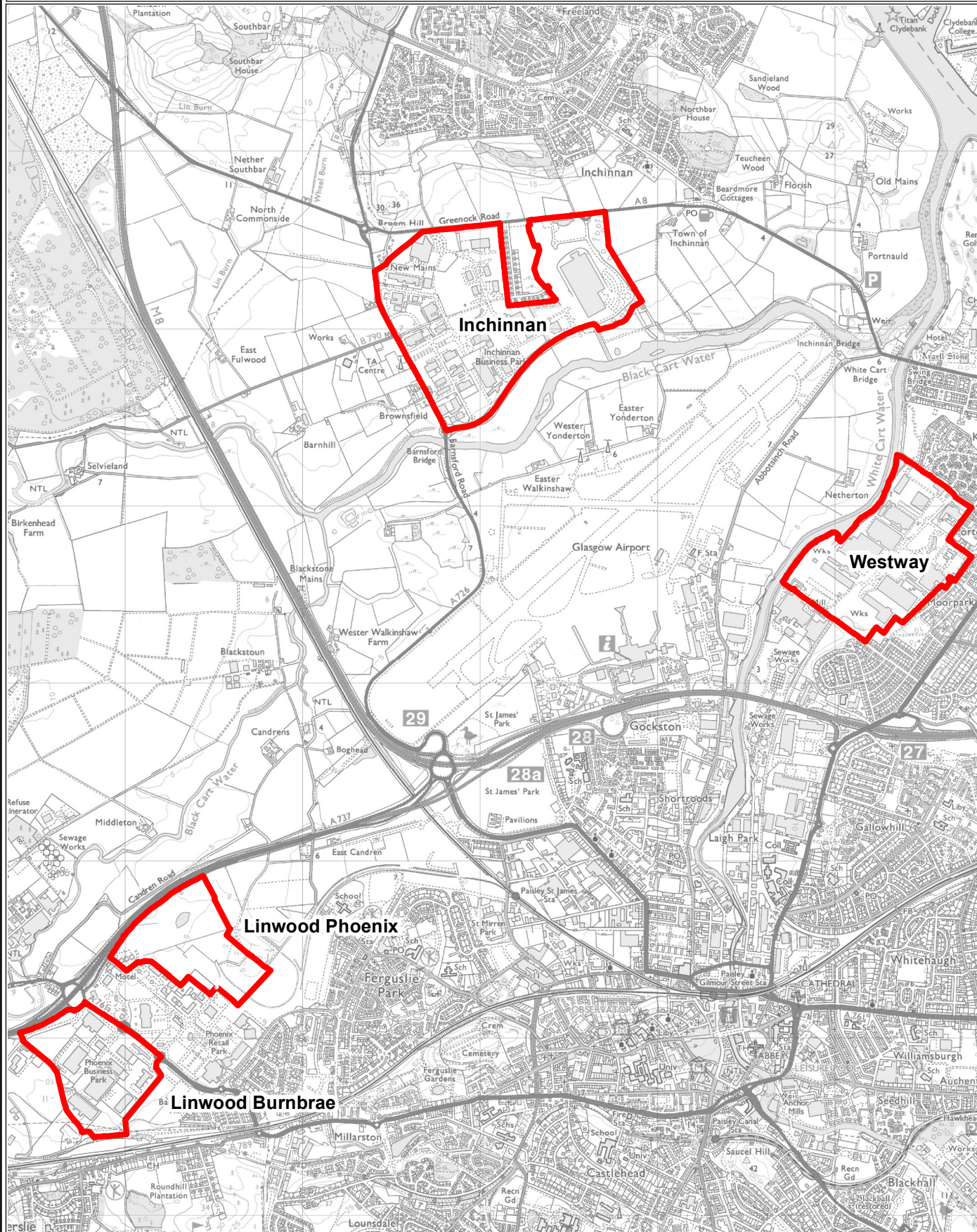
- 8.11 The Glasgow Airport Masterplan 2011 identifies the potential for expansion of the existing airport campus to the north east and the development of new commercial and industrial uses in the medium term.
- 8.12 The regeneration of the Cart Corridor Area in Paisley is recognised as a strategic priority for Renfrewshire. The Masterplan for the area will in due course deliver almost 250,000 square feet (in five phases) of industrial and business floorspace creating jobs and opportunities to meet a recognised demand for commercial space within Paisley.
- 8.13 There are 4.9 ha of marketable industrial and business land within the Paisley Cart Corridor Area, all of this land is of quality status. In 2010, the construction of four Class 4 office units (5,000 square metres) at Marchfield Avenue was completed. This development was part of the first commercial phase of the Cart Corridor regeneration project and most of the available floorspace has now been let. Cart Corridor Joint Venture Company have notified the Council of their intention to proceed with a planning application for phase 2 of the development which will seek approval for the erection of mixed use business, general industry/storage or distribution, hotel, food & drink, retail and residential development.

9. Summary

- 9.1 The notable feature of the last few years has been a lack of land take-up for industrial and business uses. This is seen as a direct consequence of the economic downturn and current market uncertainty for property investment. However, there are some signs this year that development activity is starting to pick up with new investment at Westway and Inchinnan Business Park within the GAZ and work commencing on a replacement leather cutting factory at the Locher Works, Bridge of Weir.
- 9.2 Renfrewshire has a considerable and varied supply of land for industrial and business developments. 48% of Renfrewshire's marketable supply is identified quality sites, with 83% of the quality sites being within the Glasgow Airport Zone SEIL and the Hillington and Renfrew North SEIL. Over 40ha of marketable land, which comprises the Bishopton SEIL, will further boost the quality supply once the required infrastructure is in place and remediation works are complete for Bishopton CGA.
- 9.3 Renfrewshire Council will continue to explore opportunities for good quality, well located industrial and business sites, as part of its ongoing review of land use designations for the Renfrewshire LDP. The identification of 3 SEIL's within Renfrewshire reflects the quality of these economic locations and the opportunity they provide to support sustainable economic growth within key growth sectors, including business and financial services, distribution and logistics, life sciences and green technologies.

APPENDIX 1: Strategic Economic Investment Locations

Glasgow Airport Zone SEIL



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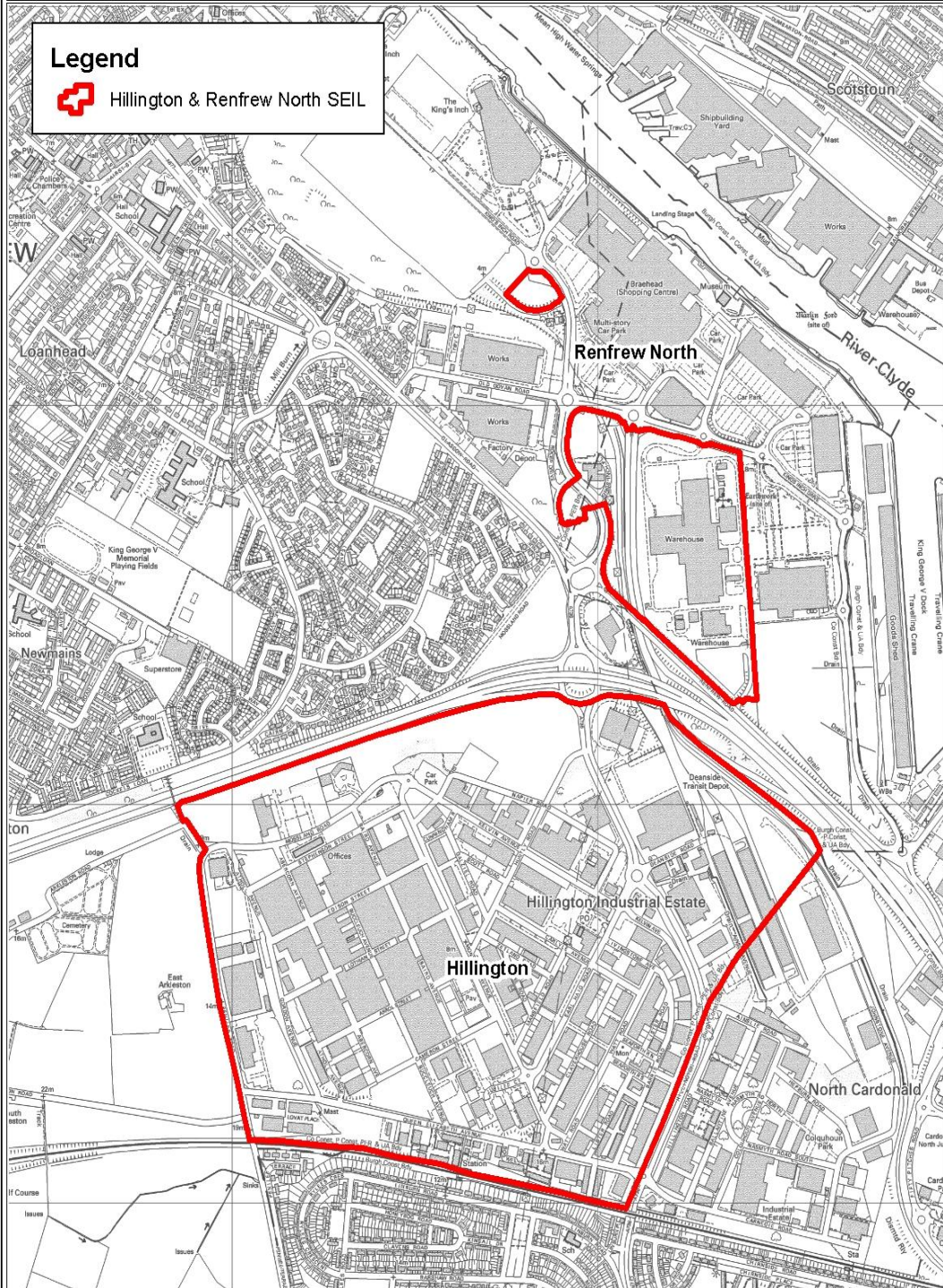
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Hillington & Renfrew North SEIL

Legend

 Hillington & Renfrew North SEIL



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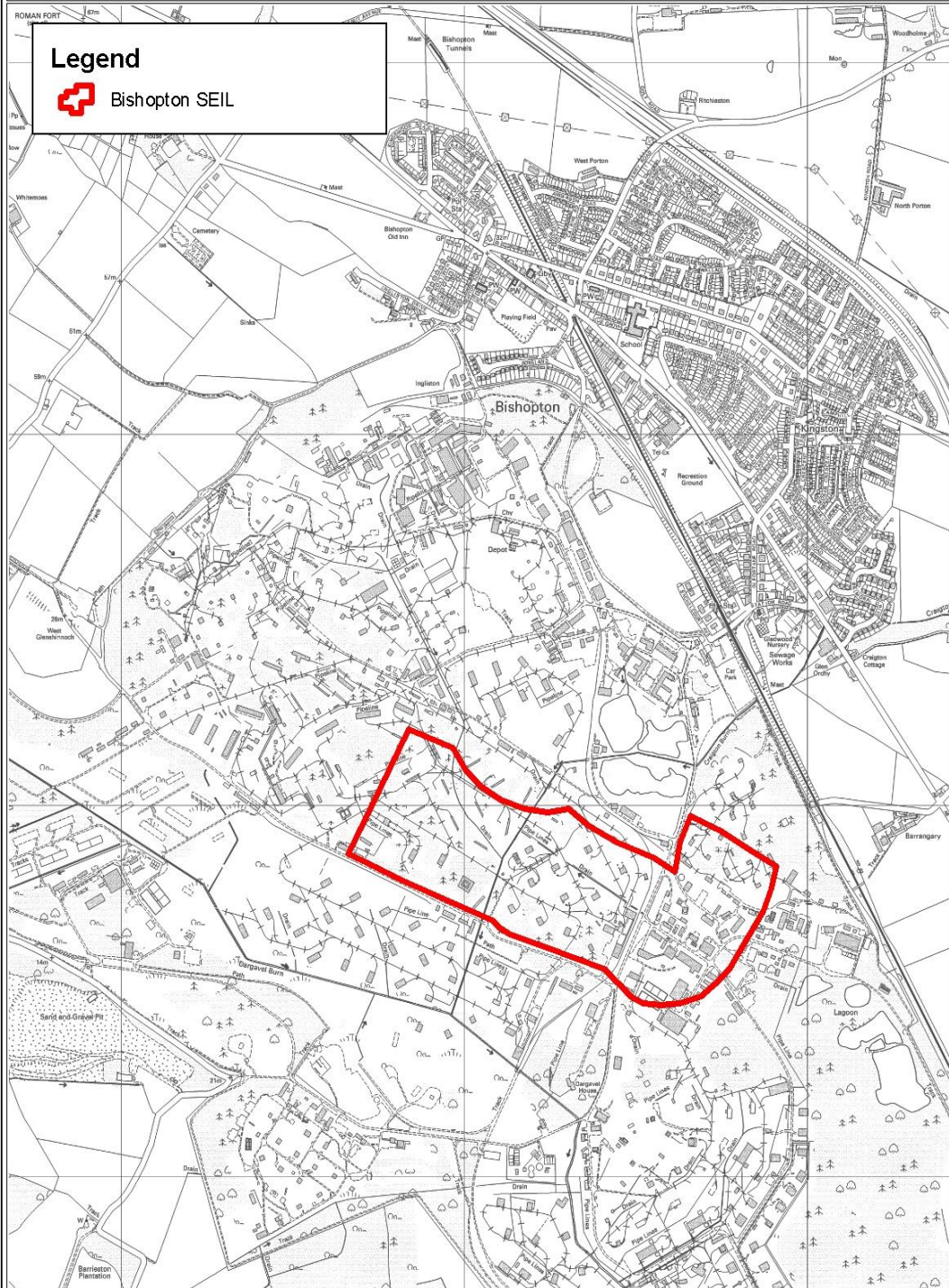
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Bishopton SEIL

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Bishopton SEIL



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APPENDIX 2: Industrial Land Supply Definitions

Category 1: **Confirmed Marketable Sites.** Sites with no servicing problems, in good locations and considered marketable by all parties.

Category 2: **Potential Marketable Sites.** Sites which could be marketed but which require some improvements in terms of promotion, appearance or servicing.

Category 3: **Remain in Industry Sites.** Additional sites in predominantly older industrial areas.

Category 4: **Reserved Sites.** Sites held by firms for their own expansion and therefore not part of the general industrial land supply.

Category 5 & 7: **Review to Other Potential Uses.** Sites that could be re-allocated from industry and business and are currently under review.

APPENDIX 3: Industrial Land Supply Sites as of 31 March 2012

Industrial Land Supply: March 2012

Marketable land supply - categories 1 and 2. General industrial land supply - categories 3 and 4. Sites being reviewed for other potential uses (Non Marketable) - categories 5 and 7.

LANDREF	INDUSTRIALAREA	STREETNAME	NETAREA	Category	QUALITY	MAPREF	
BI001	ROF	ROF, Station Road	40.3	2	PQ	243228	669827
BR001		Brookfield	0.4	5	o		
BW001	Millbrae	Kilmalcolm Road	0.2	5	o	238534	665838
BW005	Station Road	Main Street	0.65	5	o	239154	665333
ER002	Erskine Riverfront	Adjacent A725	3.09	1	QS	246321	671731
ER003A	Erskine Riverfront	Adjacent A726	7.2	5	o	246810	671147
ER003B	Erskine Riverfront	Adjacent to A726	1.4	5	o	246892	670830
ER005	Erskine Riverfront	Bridgewater	10.2	5	o	247709	670544
HI005	Hillington IE	Huntly Road	0.6	4	o	250983	665749
HI013	Hillington IE	Mossland Road	3.44	1	QS	251503	666034
HI013B	Hillington IE	Mossland Road	2.5	1	QS	250977	665965
HI013C	Hillington IE	Mossland Road	0.61	1	QS	251538	666061
HI014	Hillington IE	Montrose Ave/Kelvin Ave	0.4	1	QS	251509	666004
HI015	Hillington IE	Napier Rd/Hillington Rd	3.34	1	QS	251812	666148
HI015A	Hillington IE	Napier Rd/Hillington Rd	2.18	1	QS	251754	666070
HI017	Hillington IE	Queen Elizabeth Ave	1	1	QS	251133	665334
HI018	Hillington IE	Watt Road	0.3	1	QS	252038	665311
HI019	Hillington IE	Mossland Road	0.2	1	QS	251238	665986
HI025	Hillington IE	Gordon Ave / Queen Eliz Ave	0.9	1	QS	251337	665799
HI028	Hillington IE	Mossland Road	0.8	1	QS	251083	665848
HI029	Hillington IE	Queen Elizabeth Avenue	0.56	1	QS	251648	665102
HI030	Hillington IE	Lister Road	0.125	2	PQ	252178	665467
HI032	Hillington IE	Abercorn Avenue	10.5	2	PQ	251434	665411

LANDREF	INDUSTRIALAREA	STREETNAME	NETAREA	Category	QUALITY	MAPREF	
HI033	Hillington IE	Kelvin Avenue	0.54	1	QS	252131	665649
IN001A	Inchinnan IE	Greenock Road	1.1	1	QS	247501	668532
IN001B	Inchinnan IE	Greenock Road	1.04	4	o	247348	668500
IN001C	Inchinnan IE	Greenock Road	1.9	1	QS	247661	668546
IN004	Inchinnan IE	Inchinnan Bus Park (West)	2.6	1	QS	246590	668051
IN005B	Inchinnan IE	Inchinnan Drive	1.1	4	o	247296	666875
IN007	Inchinnan IE	Newmains Avenue	1	1	QS	246749	668293
IN009	Inchinnan IE	Brownsfield Road	3.1	1	QS	246849	668204
IN010	Inchinnan Business Park	Fountain Drive	0.7	2	PQ		
JO004	Nth Johnstone	Walkinshaw Street	0.1	5	o	242972	663449
JO008	Nth Johnstone	Gas St/Walkinshaw St	0.2	5	o	243092	663461
JO011	North Johnstone	Laighcartside Street	0.7	5	o	243182	663348
LC001	Struthers	Church Street	0.86	4	o	235336	665868
LC002	Church Street	Lochwinnoch	0.4	3	o	235249	658714
LW001	Linwood Burnbrae	Burnbrae Road	3.4	2	PQ	244265	663930
LW003	Linwood Phoenix	Linwood Road	19.2	1	QS	245348	664609
LW004	Linwood Burnbrae	Burnbrae Road	4.4	2	PQ	244060	663799
LW006	Linwood Burnbrae	Linwood Road	3.4	7	o	245263	663551
LW007	Linwood Phoenix	Barskiven Rd	1.68	1	QS	245638	664233
LW008	Linwood Phoenix	Linwood Road	4	7	o	245113	663615
LW009B	Linwood Phoenix	Linwood Road	1.8	1	QS	244904	663538
LW010	Linwood Burnbrae	West Avenue	0.4	1	QS	244879	664038
LW012	Linwood Burnbrae	Burnbrae Road	5.4	2	PQ	243704	663778
LW013		Middleton Road	6.35	5	o		
PA007	Abercorn Street	Abercorn Street	0.8	4	o	248458	665129



LANDREF	INDUSTRIALAREA	STREETNAME	NETAREA	Category	QUALITY	MAPREF	
PA012	Millarston	Fulbar Road	0.2	5	o	245950	663312
PA016	Murray Street	Greenhill Rd/Murray St	1.56	2	OM	247232	664566
PA020	Murray Street	Underwood Road	2.3	5	o	247582	664382
PA024	Hawkhead	Hawkhead Road	2.9	4	o	249629	663461
PA027	Murray Street	Murray Street	0.38	2	OM	247611	664664
PA033	Murray Street	Murray Street	1.01	2	OM	247438	664723
PA036	Abercorn Street	Hamilton Street	0.8	3	o	248559	664544
PA040	Millarston	Ferguslie Main Road	1.8	5	o	246131	663373
PA046	Inchinnan Road	Inchinnan Road	0.7	3	o	248231	665142
PA052	Murray Street	MacDowall Street	0.6	3	o	247585	664782
PA055	Murray Street	Underwood Road	0.4	3	o	247812	664478
PA057	Murray Street	Murray Street	0.28	3	o	247506	664629
PA060	Murray Street	Paisley	2	5	o	247060	664647
PA061	Renfrew Road	Paisley	0.8	3	o	248864	665574
PA063	Sneddon	Back Sneddon	0.06	3	o	248270	664552
PA065A	St James	Greenock Road	2.78	5	o	246311	665021
PA065C	St James	Greenock Road	1.2	5	o	246679	665161
PA066	Inchinnan Road	Inchinnan Road	3	1	QS	248215	665486
PA067	Airport East	Abbotsinch Road	0.48	2	PQ	248427	666140
PA068	Murray Street	MacDowall Street	1.35	3	o	664534	247692
PA069	Inchinnan Road	Sanderling Road	0.4	1	QS	248200	665721
PA070	Inchinnan Road	Sanderling Road	0.4	1	QS	247997	665699
PA071	Murray Street	McFarlane Street	0.22	4	o	247200	665081
PA072	Abercorn Street	Abercorn Street/harbour Road	0.22	3	o	248481	664808
PA073	Shortroods	Marchfield Avenue	0.8	1	QS	248193	665637

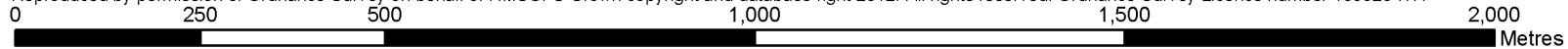
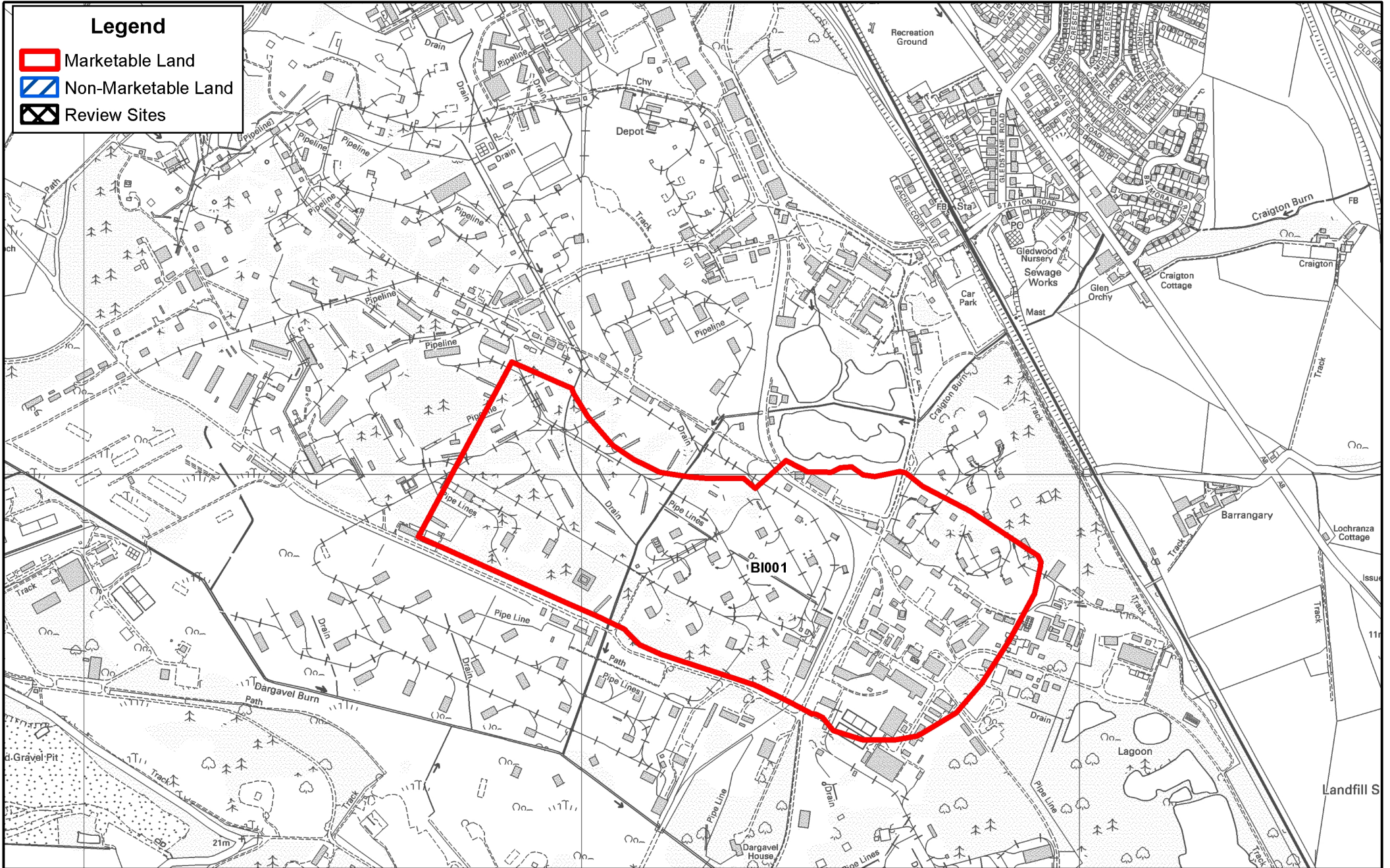
LANDREF	INDUSTRIALAREA	STREETNAME	NETAREA	Category	QUALITY	MAPREF	
PAo75	Murray Street	Clark Street	0.7	4	o	247220	664958
PAo76	Shortroods	Inchinnan Road	0.3	2	PQ	248269	665676
PAo77		Harbour Road	2.4	5	o		
PAo78		Neilston Road	3.45	5	o		
PAo79		Ferguslie Park Avenue	1.7	5	o		
RWoo4	Renfrew North	Fishers Road	6	5	o	250068	668416
RWoo6	Renfrew North	Kings Inch road	1.08	1	QS	251439	667950
RWoo7	Westway	Wright Street	2.6	1	QS	249085	666360
RW014	Westway	Wright Street (South)	3.1	7	o	248990	666235
RW016	Westway	Porterfield Road	3	1	QS	248956	666524
RW019	Renfrew North	Meadowside Street	4	5	o	250271	668322
RW021	Westway	Porterfield Road	1.1	1	QS	249498	667152
RW025	Renfrew North	Kings Inch Road	1	1	QS	251684	667354
RW027	Mitsui Babcock	Wright Street	2.3	7	o	248780	666377
RW028		Rocep Drive	0.6	1	QS	251935	666751
RW029		Kings Inch Drive	0.53	1	QS		
RW030		KingsInch Drive	1.9	1	QS		
RW031		Old Govan Road	5.8	2	PQ	251682	666990
RW032		Brown Street	1.6	5	o		

Footnote: Quality Supply = QS, Potential Quality = PQ, Other Marketable = OM. Further information available on request.

Bishopton - Industrial Land Supply Sites 2012

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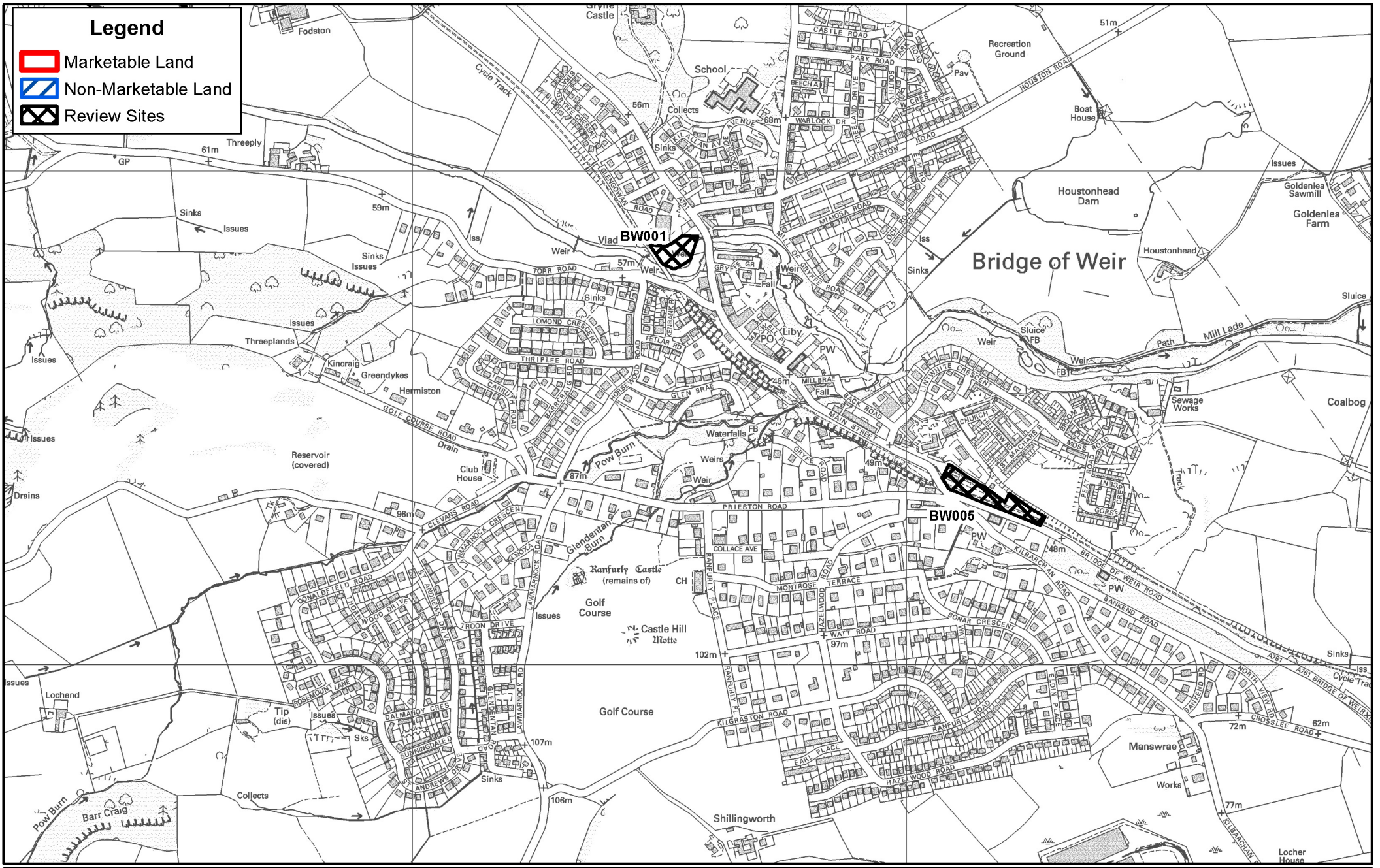
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Bridge of Weir - Industrial Land Supply Sites 2012

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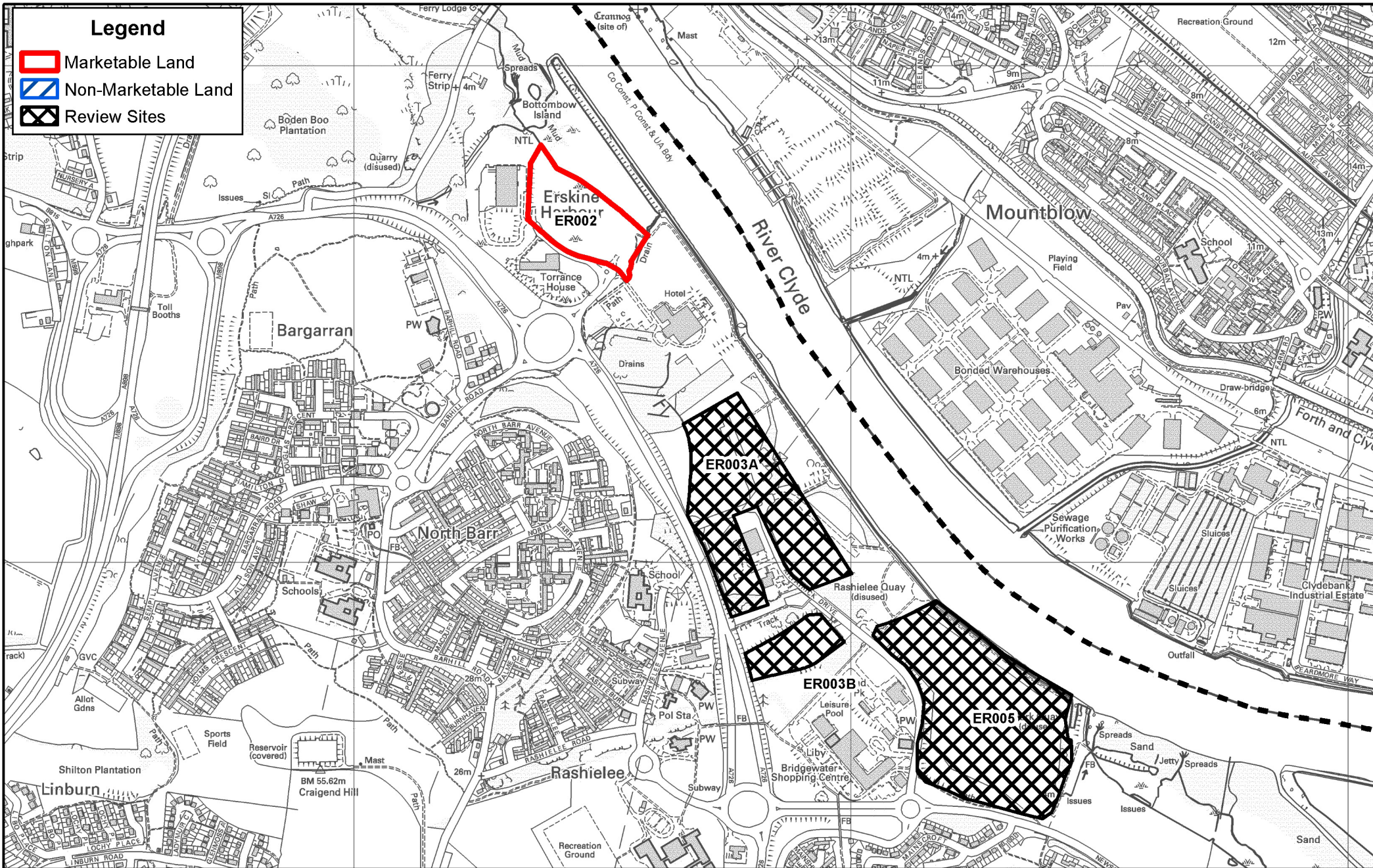
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Erskine - Industrial Land Supply Sites 2012

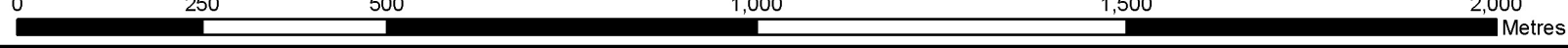
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-  Marketable Land
-  Non-Marketable Land
-  Review Sites

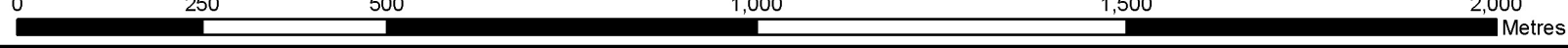
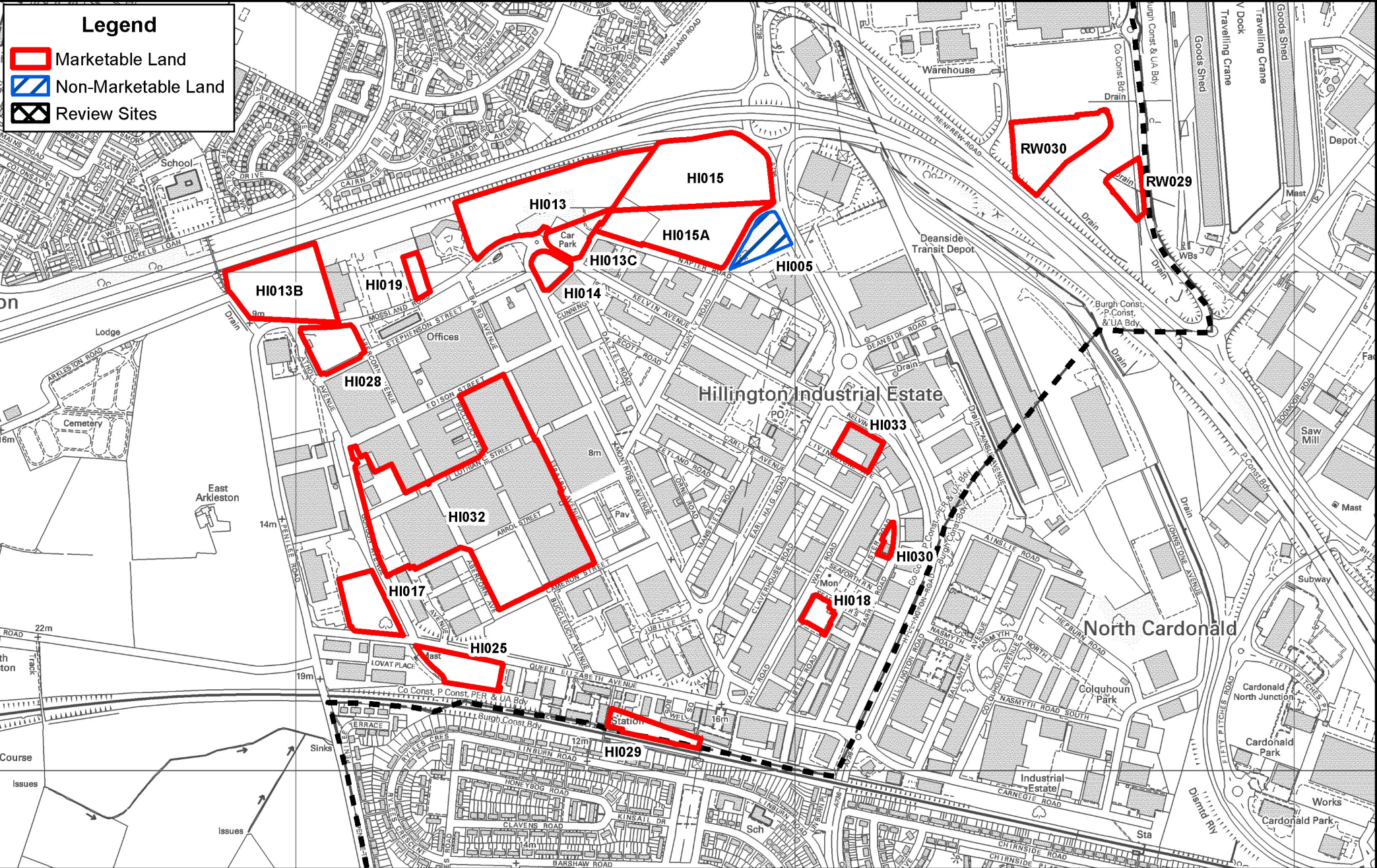


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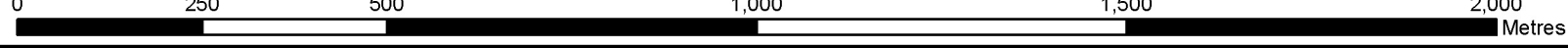
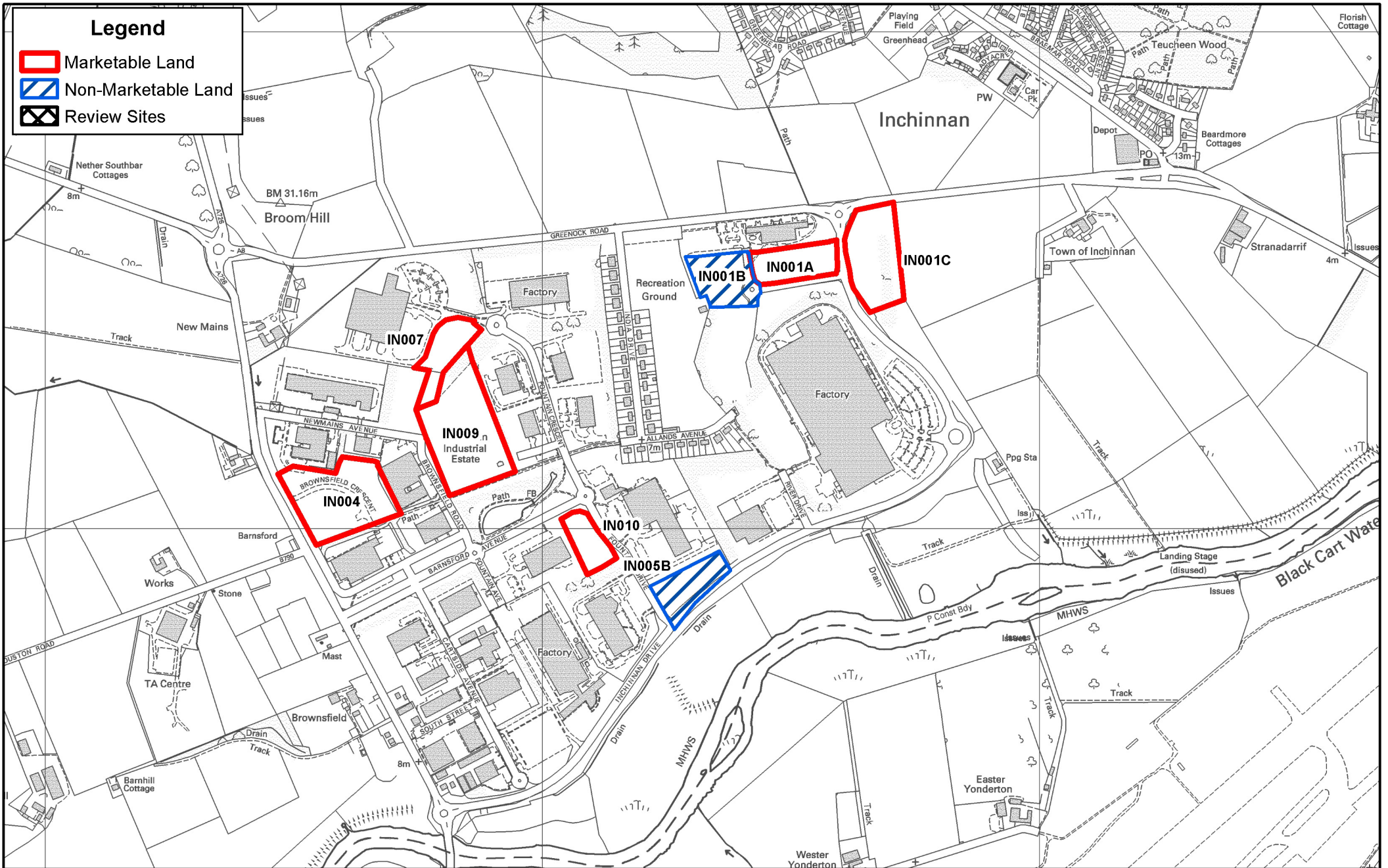
Hillington - Industrial Land Supply Sites 2012



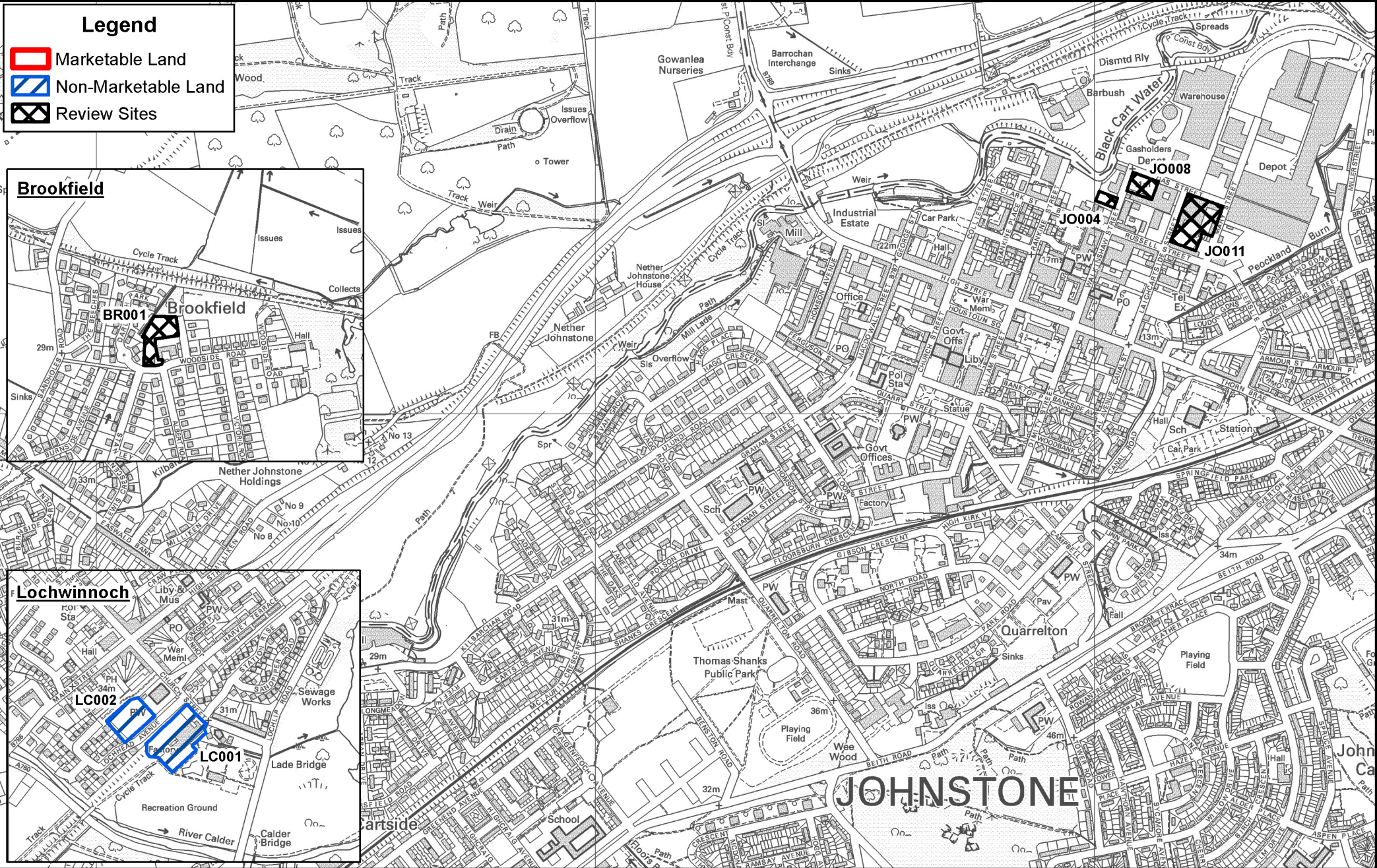
Inchinnan - Industrial Land Supply Sites 2012

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- Marketable Land
- Non-Marketable Land
- Review Sites

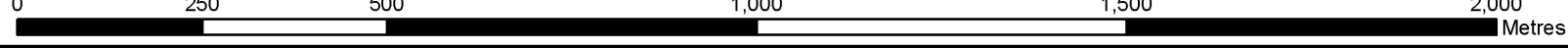


Johnstone, Lochwinnoch & Brookfield - Industrial Land Supply Sites 2012



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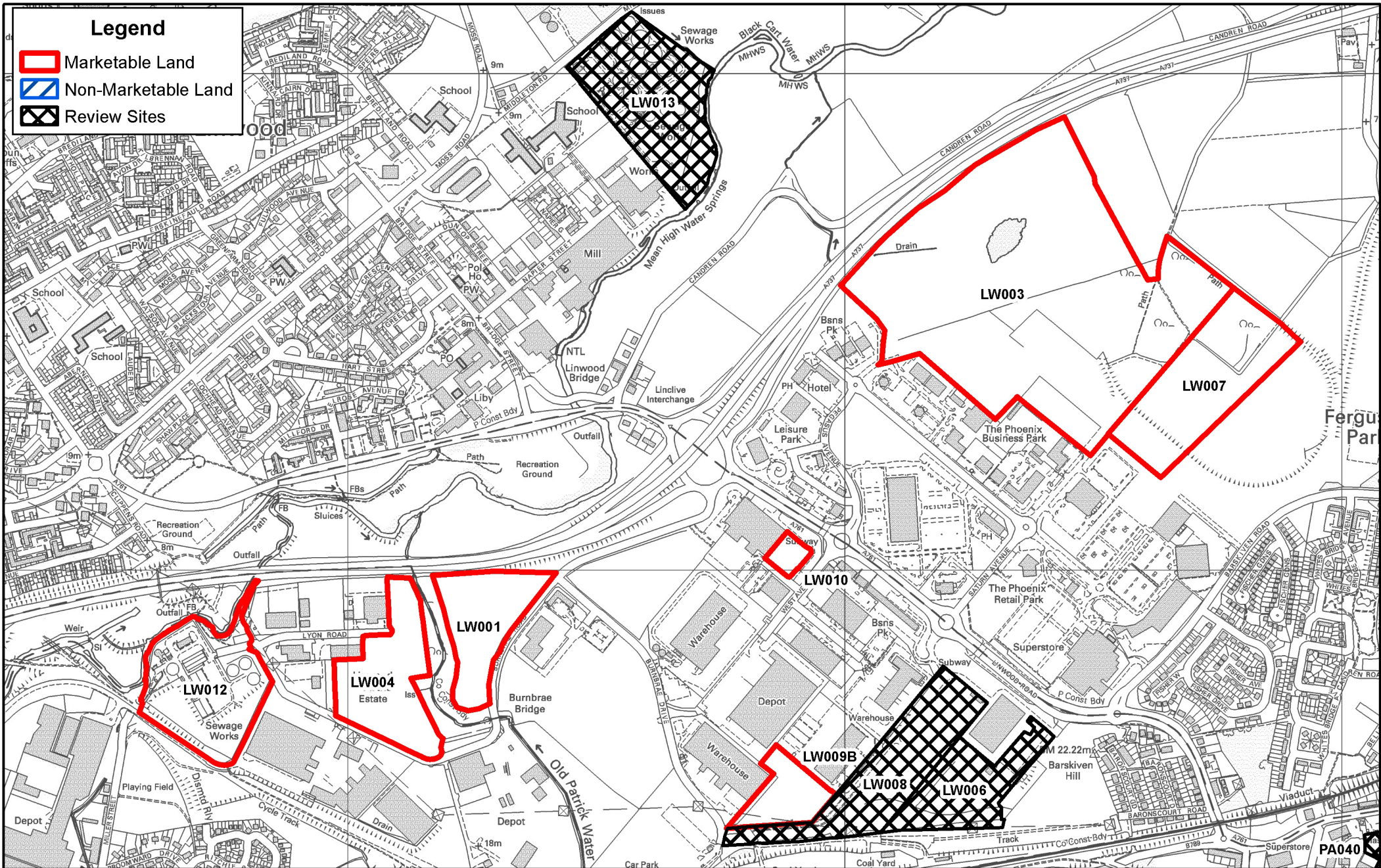
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Linwood - Industrial Land Supply Sites 2012

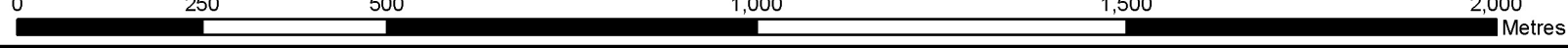
Legend

- Marketable Land
- Non-Marketable Land
- Review Sites

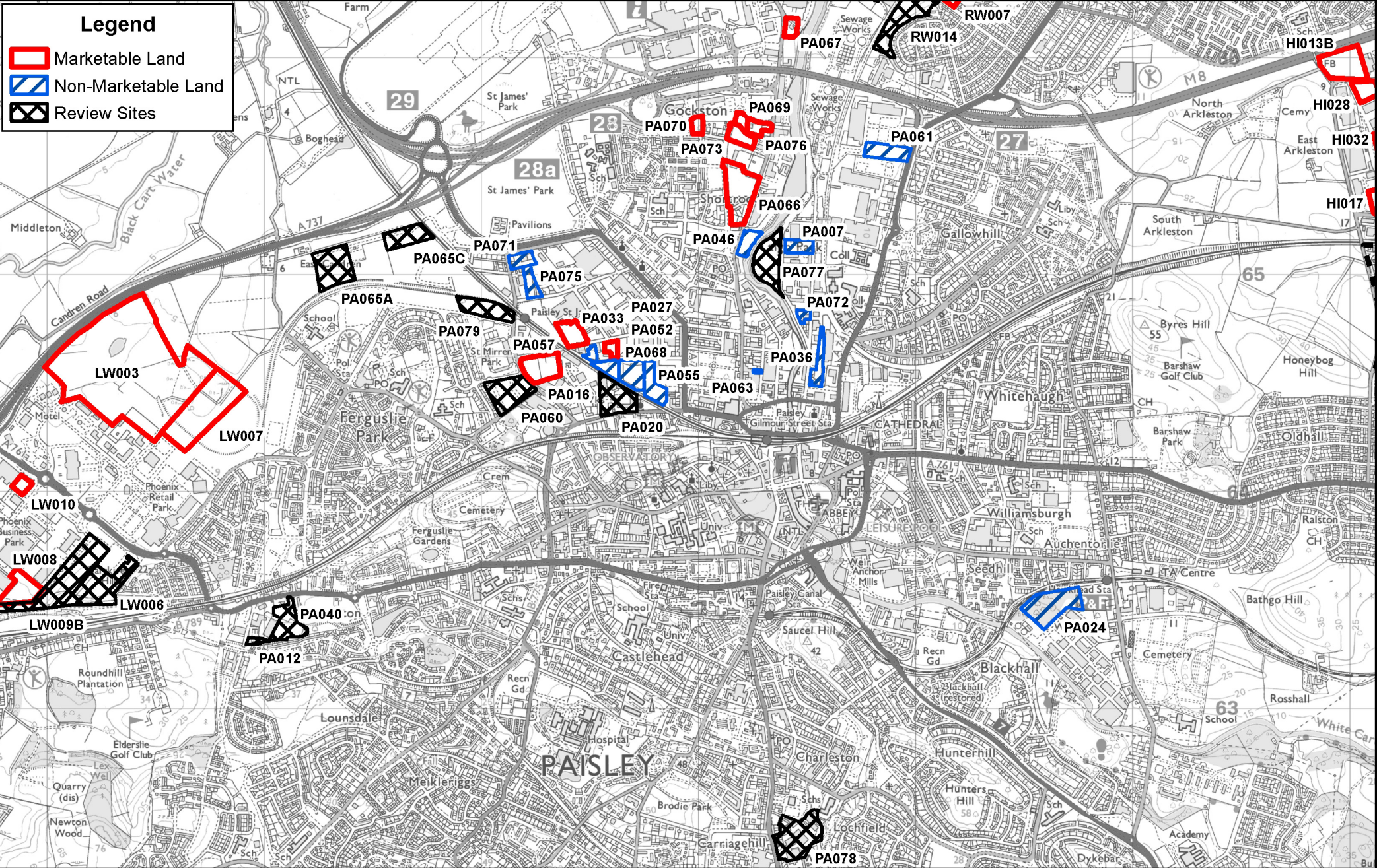


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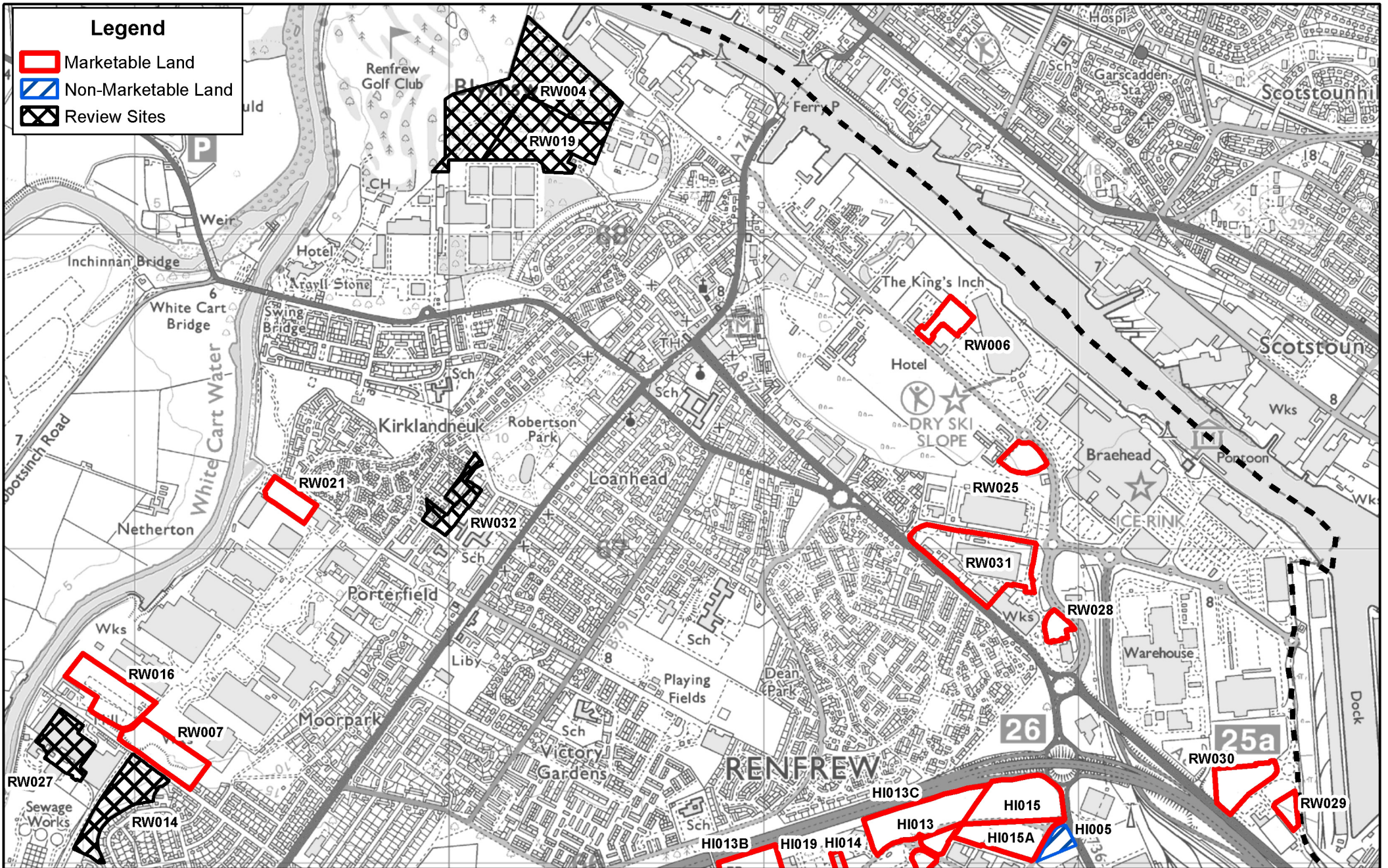
Paisley - Industrial Land Supply Sites 2012



Renfrew - Industrial Land Supply Sites 2012

Legend

- Marketable Land
- Non-Marketable Land
- Review Sites



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