

Dundee City Council

Dundee Local Development Plan 2

Business Land Audit 2025



1. Introduction

The Dundee Business Land Audit (BLA) is an annual audit to monitor supply, take up and status of business land within the Dundee City Council (DCC) area. The audit assesses the range and choice of marketable sites and locations for businesses with a variety of size and quality requirements, as well as identifying the availability and constraints of employment land sites within DCC boundary.

The Business Land Audit (BLA) is carried out by the Planning Team within the City Development Department. The survey is undertaken annually at the start of April. The audit is only concerned with business land defined as land within an area allocated within the Dundee Local Development Plan 2019 as a Principal, Specialist or General Economic Development Area.

Business Land:

Definition: Land within an area allocated as a Principal, Specialist or General Economic Development Area in the Dundee Local Development Plan 2019.

Key Statistics 2025

Marketable Supply = 140.23 hectares

Take Up of Business Land in 2024/25 = 1.7 hectares

A GIS map has been prepared to provide some context and an interactive map to show the sites that have formed the basis of the audit. The GIS map can be accessed from the [Planning Division: Research and Statistics | Dundee City Council](#)

Policy Context

National Planning Framework 4 (NPF4)

NPF4 indicates that Local Development Plans (LDPs) should allocate sufficient land for business and industry, considering business and industry land audits, in particular ensuring that there is a suitable range of sites that meet current market demand, location, size and quality in terms of accessibility and services. This allocation should take account of local economic strategies and support broader objectives of delivering a low carbon and net zero economic recovery, and a fairer and more inclusive wellbeing economy.

NPF4 aims to promote productive places, and Policy 26 focuses on business and industry and intends to encourage, promote and facilitate business and industry uses and to enable alternative ways of working such as home working, live-work units and micro-businesses.

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Dundee Local Development Plan (2019)

The Dundee Local Development Plan was adopted in February 2019, establishing land use allocations and policies relevant to business development and employment in the Council's administrative area.

The current economic climate remains characterised by strong expectations for economic growth particularly in key sectors for Dundee and Scotland including: energy (specifically oil and gas decommissioning and offshore renewables); tourism; life sciences, universities and the creative industries. As well as supporting the growth of these sectors the City's economic strategy looks to meet the needs and opportunities of indigenous business and inward investors.

To support growth within these areas the Dundee Local Development Plan 2019 strategy is to identify and safeguard a wide range of sites for businesses in locations across the city. These locations are identified on the LDP 2019 Proposals Map as being either Principal, Specialist or General Economic Development Areas.

There are six policies in the LDP 2019 related to employment which emphasise the primary importance of economic growth in the land use strategy as a whole.

Dundee's Economic Development Area Profiles

Policy 3: Principal Economic Development Areas	City-wide significance and as such will be safeguarded for Class 4 (Business), Class 5 (General Industry) and Class 6 (Storage and Distribution). Uses other than these will be resisted
Policy 4: Specialist Economic Development Areas	Encouragement will be given to the establishment and retention of uses within Class 4 (Business) on the Specialist Economic Development Areas identified on the Proposals Map, particularly those uses which are in accordance with the distinctive nature of each area.
Policy 5: General Economic Development Areas	Proposals for Class 4, 5 and 6 developments will be supported. Other uses of a wider industrial nature such as car showrooms, wholesaling and scrap yards may be permitted provided subject to conditions
Policy 6: Ancillary Services within Economic Development Areas	Within Economic Development Areas, appropriate small-scale ancillary services which can be demonstrated to meet the needs of employees and complement existing businesses will be supported

Other policies that make special provision for particular needs on designated economic development areas include; Policy 43: Waste Management Installations and Policy 45: Energy Generating Facilities. These policies ensure that Dundee has a generous and varied supply of land in accessible locations across the city to provide for the potential needs of new and developing sectors.

2. Methodology

The survey only includes sites located within the allocated Economic Development Areas identified in the Local Development Plan 2019. It does not include vacant buildings. The survey identifies the business land supply and then assesses this to differentiate between those sites which are serviced or serviceable within 5 years and those which are not. This is defined in the survey as: This is defined in the survey as:

- a) land classified as marketable and assessed and recorded as being immediately available;
- b) land classified as marketable and assessed and recorded as being affected by minor constraints but also serviceable within 5 years; and
- c) land assessed and recorded as having major constraints.

Although most land classified as immediately available is serviced land this is not necessarily the case with all sites. Any business land that is without minor or major physical obstacles to development that can be built on immediately, meets anticipated requirements and is accessible by walking, cycling and public transport is regarded as immediately available.

Preparation of the Audit

The audit is prepared from sites designated for employment uses in the LDP 2019. These sites have been through the formal plan adoption process and therefore have been identified as effective.

The 2025 audit undertook an assessment of sites as of 1st April 2025 and includes physical surveys of sites taken at that time. The survey included a reassessment of a site's capacity to be developed, and this also resulted in some minor boundary alterations (involving both expansion and reductions in site areas). The 2025 audit repeated the same physical survey method as used in the 2024 audit so as to offer comparable statistics.

Each site must be a parcel of land at least 0.1 hectares in size to be included in the audit and be completely vacant at the time of survey.

Some sites did again have minor evidence of activity such as parked HGV's or trailers but if a site had no signage, fencing or other indicators suggesting that this was a permanent active use then these would still be considered to be vacant and available for development

As before, all sites are assessed for provision of services and any potential constraints are identified, we gather the following information on all of our sites:

- Site Area (ha)
- Availability (immediately available, minor constraints, major constraints)
- Constraint (only physical, no constraints)
- Land use class
- Brownfield/Greenfield

3. Data Analysis

The key summary figures from the audit are presented in Table 1, covering the last five years.

The total supply of land is firstly classified as immediately available or constrained land. The land judge constrained is then further assessed and the constraints categorised as minor or major.

A total for marketable land is given by the sum of immediately available and minor constraints. The total of all constrained land is given by the total of the two sub-categories minor and major.

Table 1: Available Business Land Summary

	2019	2020 & 2021	2022	2023	2024	2025
Total Supply of available land	163.54	No data	160.74	159.81	143.04	140.23
Available land that is immediately available and therefore marketable (IA)	127.20	No data	125.22	122.86	109.15	93.77
Available land that has minor constraints but still considered marketable (MIN)	12.10	No data	11.3	No data	10.93	10.93
Available land that has major constraints and not considered marketable at this time (MAJ)	24.24	No data	24.24	No data	22.96	22.96
Total employment land that is marketable (IA + MIN)	139.30	No data	136.5	134.96	120.08	104.7
Total employment land that has constraints (MIN +MAJ)	36.34	No data	35.54	No data	33.89	33.89

An additional six sites were identified as being of 0.1 hectares or below: cumulatively amounting to 0.4 hectares.

The audit does not routinely count sites with vacant buildings, partly due to the difficulty of accurately identifying that a building is indeed entirely vacant. One site identified during the survey is notable: Broomhill Road (Former Carstore) contains a vacant building and amounts to 1.58 hectares; this site is not included in the above figures.

Chart 1: Business Supply/Annual Take Up

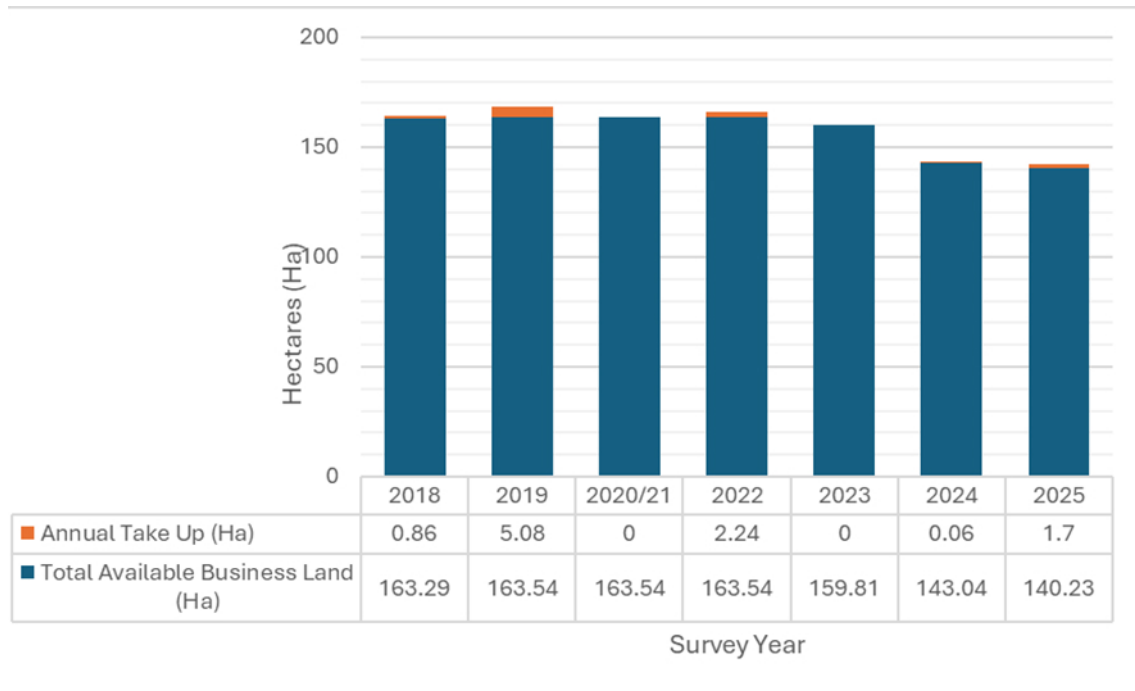


Table 2: range of immediately available site sizes

Site Size (hectares)	Number of sites
> 0.1 / under 2	45
2 - 10	10
11 - 20	0
21 +	1
Total	56

Take Up Analysis

Since 2018, the annual take up has varied from 0 – 5.4 hectares, with an average of 1.69 hectares per annum. The total take-up in 2025 was 5.4 hectares, which equated to 4.1% of the marketable supply and in total, 3 plots were taken up.

In the financial 2024/25, three sites were developed as below:

BLS0198 – 0.5 Hectares - 1 Kilspindie Street Dunsinane Industrial Estate Dundee - Erection of industrial unit (Class 5) and installation of a 2.4m high palisade security fence with associated access, parking and landscaping.

The land at Kilspindie Street located within the Dunsinane Principal Economic Development area was developed to include the erection of a new industrial building with associated fencing and parking. The proposal is mainly Class 6 (Storage and Distribution). The use is in line with the aspirations for Principal Economic Development Area and has contributed to the occupation of a vacant site, which strives to make contributions towards low/zero carbon technology in new developments.

BLS0087 –1.2 Hectares - Land to North of Arbroath Road and East of Tom Johnston Road West Pitkerro Industrial Estate Dundee - Erection of a Class 1 retail foodstore and 2no units (Class 4, 5 and 6) with ancillary trade counter, associated car parking, access, landscaping and other works.

The site, north of Arbroath Road within the West Pitkerro Principal Economic Development Area, was originally refused for supermarket use due to policy conflicts and poor sustainable travel options. The decision was later overturned on appeal by the DPEA, and the site has since been developed and is now occupied.

There was positive uptake in land during the previous survey with around 15 hectares of land being removed.

The total effective business land supply has reduced from 143.04 ha in 2024 to 127.66 ha in 2025, representing a net decrease of 15.38 ha. This change is largely due to the removal of several sites that are no longer available for development, either because they have been taken up, brought into active use, or redeveloped for alternative purposes. The most significant reduction relates to the Claverhouse Industrial Estate, where three sites have been removed following their redevelopment as a storage and distribution depot. Additional deletions include two Kilspindie Road sites which are now in active use, and a small site at Guthrie Street which has been removed from the small sites list.

Table 3: Take Up by Employment Use

Year	Employment Use						Non-employment Use				Total (ha.)
	Business	Industrial	Storage	Sui Generis	Supporting Infrastructure (Other)	Total (ha.)	Housing	Retail	Other	Total (ha.)	
2018	0	0	0	0.41	0.45	0.86	0	0	0	0	0.86
2019	0	2.50	0	2.58	0	5.08	0	0	0	0	5.08
2020/2021	0	0	0	0	0	0	0	0	0	0	0
2022	0	1.02	0.93	0.29	0	0	0	0	0	0	2.24
2023	0	0	0	0	0	0	0	0	0	0	0
2024	0.06	0	0	0	0	0	0	0	0	0	0.06
2025	0	0	0.5	0	0	0	0	1.2	0	0	1.7

The generous supply of land in locations across the city has enabled these developments to take place. Without the safeguarding policy approach within the Local Development Plan, these sites may have been developed for other uses perhaps making the site search for these businesses more difficult.

Sites for Future Consideration

The site of the former Bonar House which was demolished in 2004 and the site cleared (a long-term vacant site) is being redeveloped as a new industrial estate providing a total of 26 starter unit within the Dryburgh Principal Economic Development Area. The proposed units would be within the employment use classes 4, 5 and 6.

A further development site is adjacent the SSEN site described above, a large-scale Class 6 (storage and distribution) warehouse is being constructed. This development will provide jobs and increase economic activity within this locus.

Remedial works are ongoing with regards to the decontamination of the former gas works to enable development of the Eden Project which was granted planning permission in 2024.

New Sites

There were no new sites allocated to BLA for 2024/25 audit year.

Conclusion

The 2025 audit shows that there is a marketable supply of 140.23 hectares. This is varied in terms of size, type and location and should cater to the needs of both inward investment and the expansion of existing businesses within the city. There has been a modest take up of land over the last 12 months of 1.7 hectares. As the take up of business land is only 4.1% of the total supply of business land there is no requirement to identify new sites.

The nature of the take up is positive for Dundee, the economic strategy and the policy approach in the Dundee Local Development Plan 2019. In the wider Dundee context, there has been consistent investment in new and existing business premises creating and maintaining existing jobs directly or through construction. This investment has been made by large and small businesses, on sites across the city and across a variety of sectors including retail, manufacturing and storage.

This helps to demonstrate the wide range of businesses in Dundee and the need for the city to maintain a generous supply of business land of varying sizes and in varying locations to ensure that the City can readily respond to the needs of inward investors and those indigenous businesses already located within the City of Dundee.

A GIS map has been prepared to provide some context and an interactive map to show the sites that have formed the basis of the audit. The GIS map can be accessed from the [Planning Division: Research and Statistics | Dundee City Council](#)

Contact Details

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