SCOTTISH EXECUTIVE
Development Department

Retail Development Survey

1998-2002
5 yr Trend Analysis

5-Year Trend Analysis (1998-2002)

Retail Development Survey

July 2004

Retail
Development Survey

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Contents

1. Introduction

1.1 This report summarises the results of the annual Retail Development Surveys completed between 1998 and 2002. The surveys involved the monitoring of all retail developments over 1000 sq. m (gross) which are recorded as active by the local authority. It is hoped the results and information will be of use to planning authorities, developers and others wishing to identify market trends across Scotland.

1.2 Each survey has been a co-operative effort between local authorities and the Scottish Executive Development Department. A sincere thank you is expressed to all officers involved in collating results for their authority.

1.3 For consistency and to enable comparisons to be made, the planning stages referred to are the same as in the annual reports and the format of this report uses similar headings. Figures for approvals and construction are given to indicate the filtering effect of each stage. Whilst information on the number of entries can assist with giving an overall impression floorspace figures provide an indication of the situation on the ground.

1.4 Monitoring and review are key activities in land use planning. The current NPPG 8 Town Centres and Retailing was reviewed and published in 1998. An aim of the retail monitoring system has been to assist with the review of the performance of retail planning policy and its implementation.

1.5 The Government's broad policy objectives in NPPG 8 cover a wide range of complex issues relating to town centres and retailing. In general they are:

- To Protect and Enhance Town Centres: The commitment to town centres through applying the sequential approach and promoting development in town centres in preference to out-of-centre leads to benefits in terms of urban regeneration, access, the minimisation of transport impacts and the protection of the greenbelt and open countryside.
- To Maintain Competition and Choice: The commitment to promote an efficient and innovative retail sector, in terms of vitality and viability, is related to continued investment in new schemes and refurbishments. Promotion of mixed used schemes and quality of design also contribute to the attraction of town centres.

1.6 This analysis of trends gives some general indications of whether the policy objectives are being applied in practice. This report will assist in the next review of NPPG 8's performance and complement work undertaken by CB Richard Ellis which looked at the effectiveness of NPPG 8, published in January 2004. Consideration must, however, be paid to limitations of the data and its interpretation, for example the influence of external pressures on the wider retail environment and the subjective completion of the survey by different officials each year.

2. Summary of Findings

2.1 Overall, this report indicates that the planning system, through approvals, and the development industry, through construction, are developing retail proposals that follow national policy guidance in NPPG 8.

2.2 The general trend for both numbers and floorspace levels of retail development applications has been relatively constant, albeit with slight overall decreases. There is no clear trend of the slight decrease in numbers being compensated by an increase in floorspace. This demonstrates continued investment in order to maintain competition and choice, which is reinforced by the greatest floorspace levels tending to be for comparison and mixed use retail classes rather than convenience.

2.3 The retail floorspace constructed is mainly in cities rather than elsewhere and it is constructed within town centres rather than out-of-town locations. The largest applications entered in the surveys were generally in city authorities and in the Glasgow and Clyde Valley and Lothian Structure Plan areas. These trends are to be expected as retailing is inextricably linked to wider economic circumstances. These areas serve greater concentrations of population and will therefore be more economically viable. Within Scotland the predominance of Glasgow in terms of floorspace constructed has weakened. Other cities, particularly Edinburgh, Dundee and Aberdeen, have increased their shares.

2.4 In general the sequential approach is therefore being applied and with the increase in mixed format schemes there are wider positive implications for meeting policies related to access and transport. As the majority of developments are on brownfield sites the policy objective to protect the greenbelt and the countryside as greenfield locations is also being sustained.

3. Returns

3.1 All 32 local authorities provided returns each year, although each year a number of authorities had nil returns (see Table 1 below). There is a consistent nil return for the Island groups.

Table 1: Nil Returns 1998-2002

1998	1999	2000	2001	2002
Argyll & Bute	Argyll & Bute	Argyll & Bute	East Lothian	Eilean Siar
Eilean Siar	Eilean Siar	Eilean Siar	Eilean Siar	Orkney
Orkney	Orkney	Orkney	Orkney	Shetland
Shetland	Shetland	Shetland	Shetland	Scottish Borders
East Renfrewshire				

4. Number of Retail Developments

4.1 Over the 5 years of the retail survey a total of 1125 entries were recorded. Figure 1 shows that whilst the number of entries each year is relatively constant, the highest was in 1999, and since then has reduced to a low in 2002. Figure 2 shows how the entries were distributed over the different planning stages. (Refer to Annex, Table 1 for actual figures.)

Figure 1: Total Number of Entries

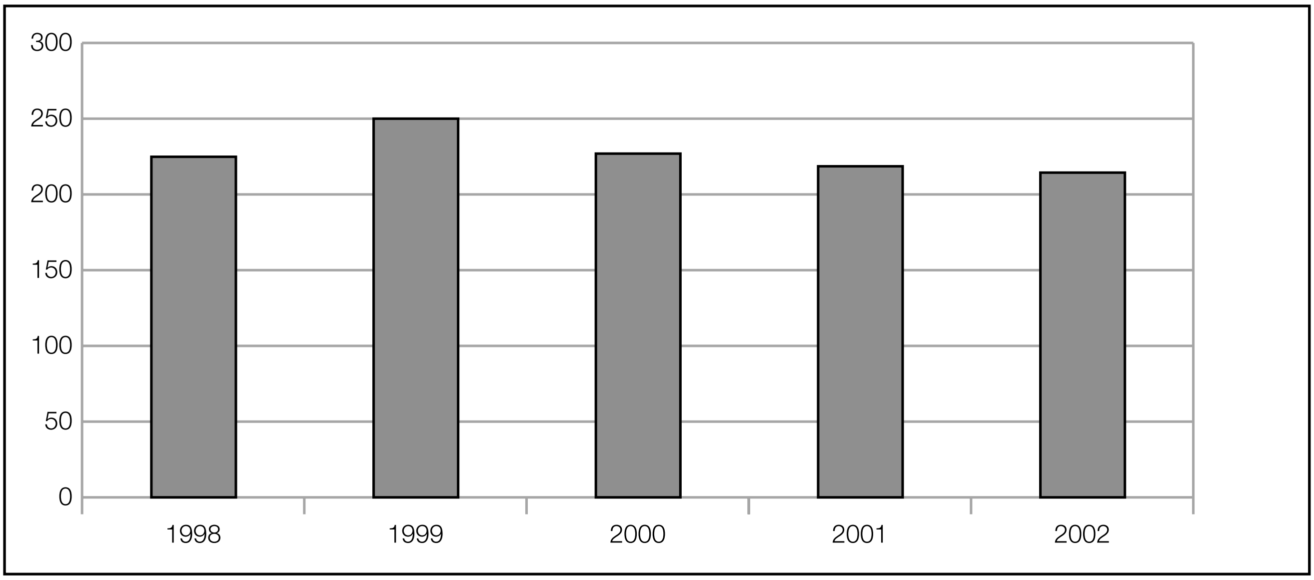
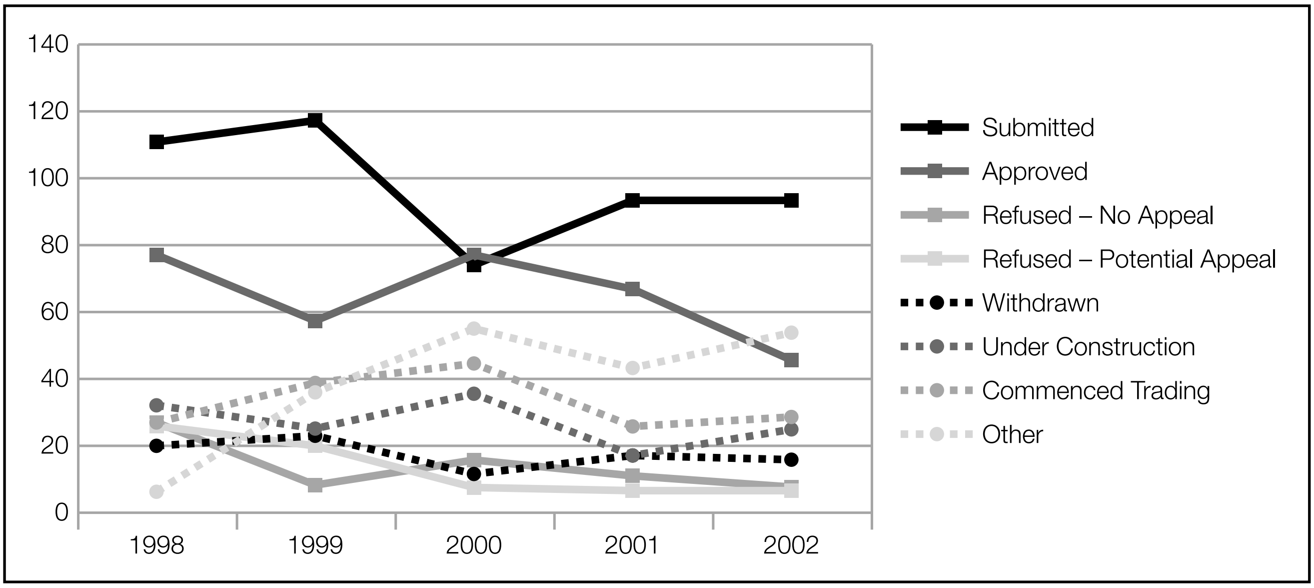


Figure 2: Number of Entries at each Key Planning Stage

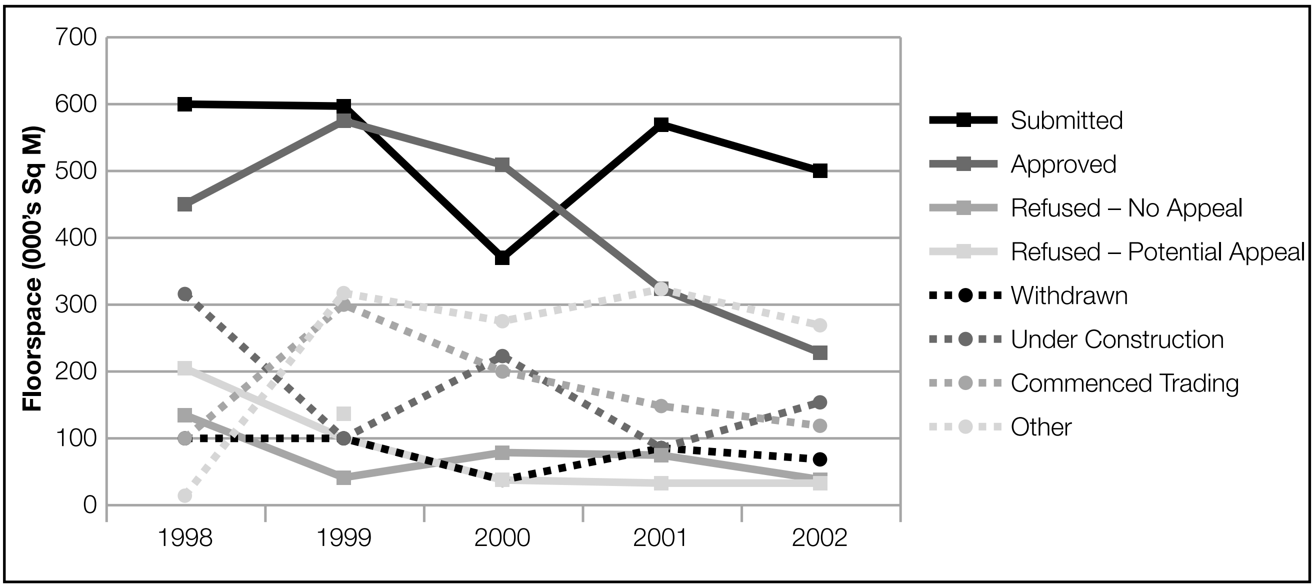


4.2 The number of retail applications submitted peaked in 1999, dipped in 2000 and has since increased slowly. Retail developments approved peaked in 2000 but has since been decreasing. There is no clear pattern of retail developments under construction but an average of 26 per year have been constructed over the 5 years. Developments which have commenced trading peaked in 2000.

5. Retail Floor Space

5.1 Figure 3 shows how floorspace was distributed over the different planning stages. The amount of floorspace submitted is relatively constant for 4 of the 5 years. (Refer to Annex, Table 2 for actual figures)

Figure 3: Floorspace by Key Planning Stage

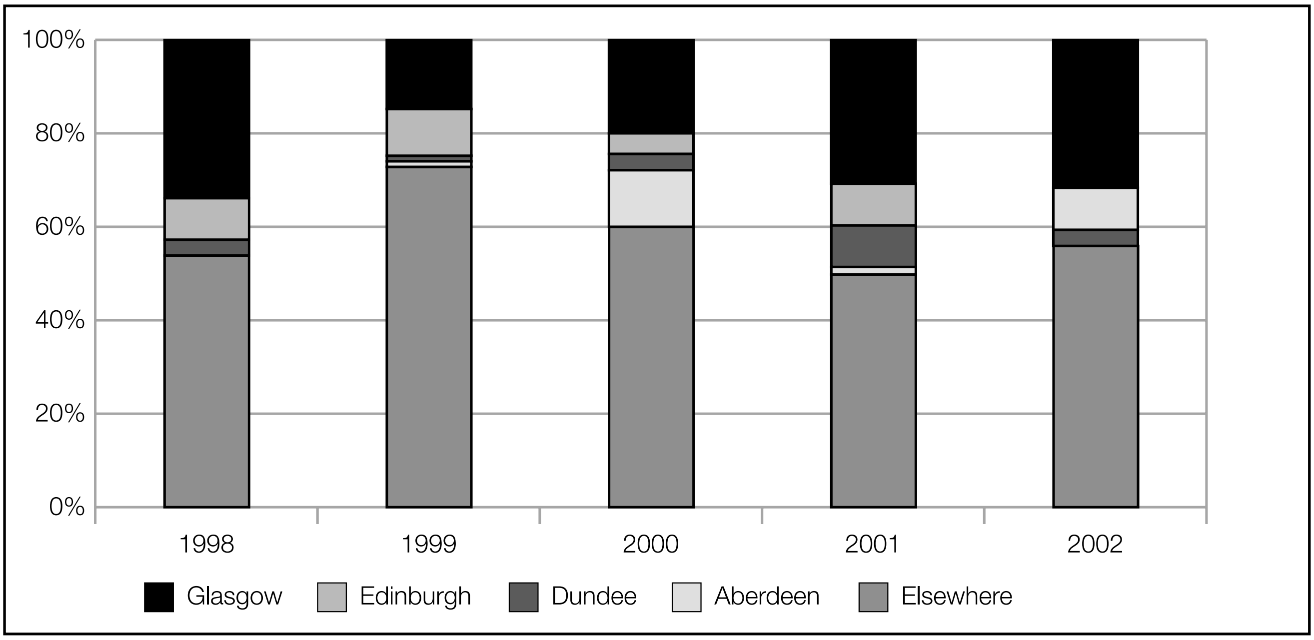


5.2 For approved retail entries Figure 2 shows a low in 1999 but this year was the highest in terms of floorspace. In line with Figure 2 however, there is no clear pattern of developments under construction, for which an average of 174,200 sq. m has been constructed annually over the 5 years. Retail floorspace where trading had commenced peaked in 1999 but it has been reducing each year since.

Distribution of Approved Floorspace

5.3 Looking at the distribution of approved floorspace, Figure 4 shows that the amount located elsewhere dominates over the four main cities. Within the cities Glasgow has the most floorspace approved over the 5 years. (Refer to Annex, Table 3 for actual figures)

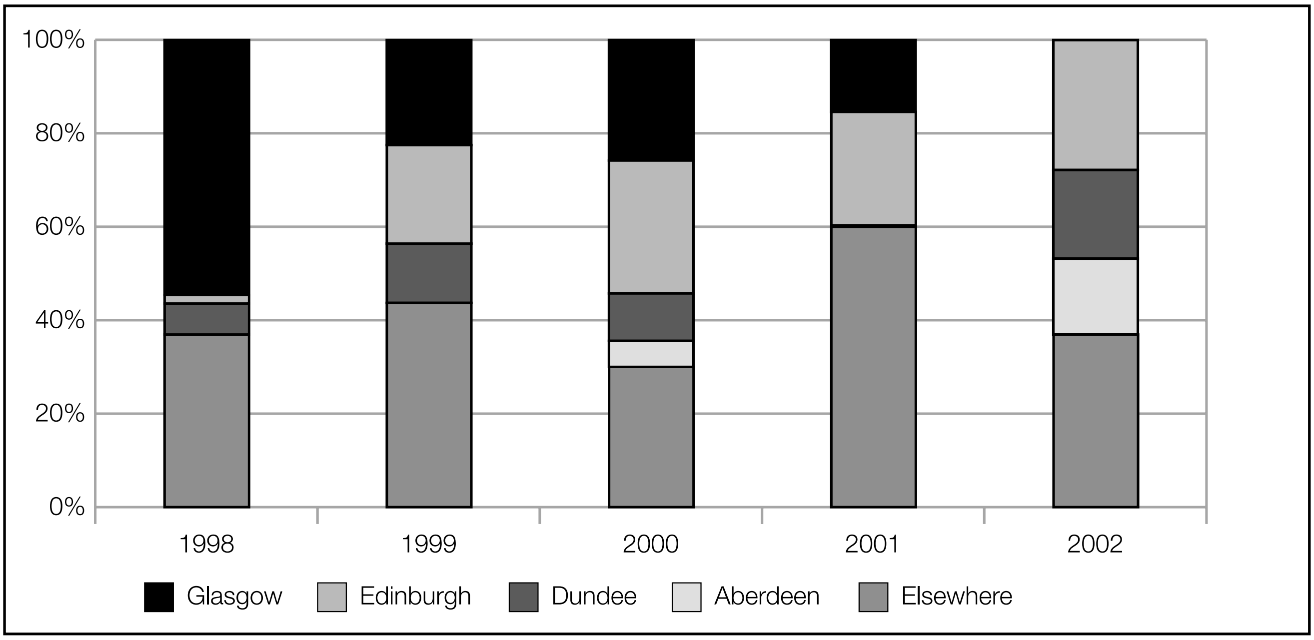
Figure 4: Percentage Approved Floorspace in Cities/Elsewhere



Distribution of Floorspace Under Construction

5.4 In contrast to the distribution of approved floorspace, the distribution of constructed floorspace (Figure 5) in the four main cities is higher than elsewhere, with the exception of 2001. The cities accounted for an average of 58% over the whole 5 years, with Glasgow predominating in 1998 and Edinburgh thereafter. There were also significant amounts of retail floorspace construction in 2002 in Dundee and Aberdeen. (Refer to Annex, Table 4 for actual figures)

Figure 5: Percentage Floorspace Under Construction in Cities/Elsewhere



6. Type of Development

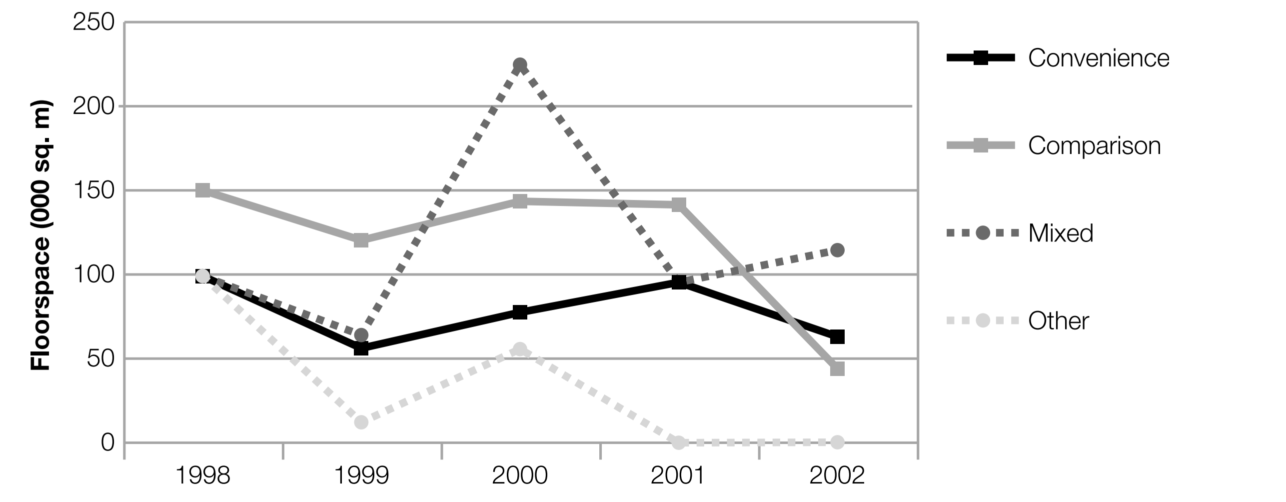
6.1 The retail types are classed as *Convenience*, *Comparison*, *Mixed* and *Other*. They comprise the following retail format types:

Convenience	Comparison	Mixed	Other
■ Superstore	■ Retail Warehouse Unit(s)	■ Retail Park	■ Factory Outlet
■ Supermarket	■ Retail Warehouse Park	■ Shopping Centre/ Mall	■ Factory Outlet Centre
■ Discount Supermarket	■ Other Comparison	■ District/Town/ City Centre Infill	■ Not Listed Above
■ Other Convenience		■ Local Shop/ Neighbourhood Centre	
		■ Other Mixed	

Approved Floorspace

6.2 Over the 5 years of the survey the amount of convenience floorspace approved remained relatively constant, averaging at approximately 79,000 sq. m per year, as shown in Figure 6. The floorspace approved for comparison developments is also relatively stable but a significant decline is shown in 2002. For mixed development an exceptionally high peak can be seen in 2000 of 228,000 sq. m. (Refer to Annex, Table 5 for actual figures)

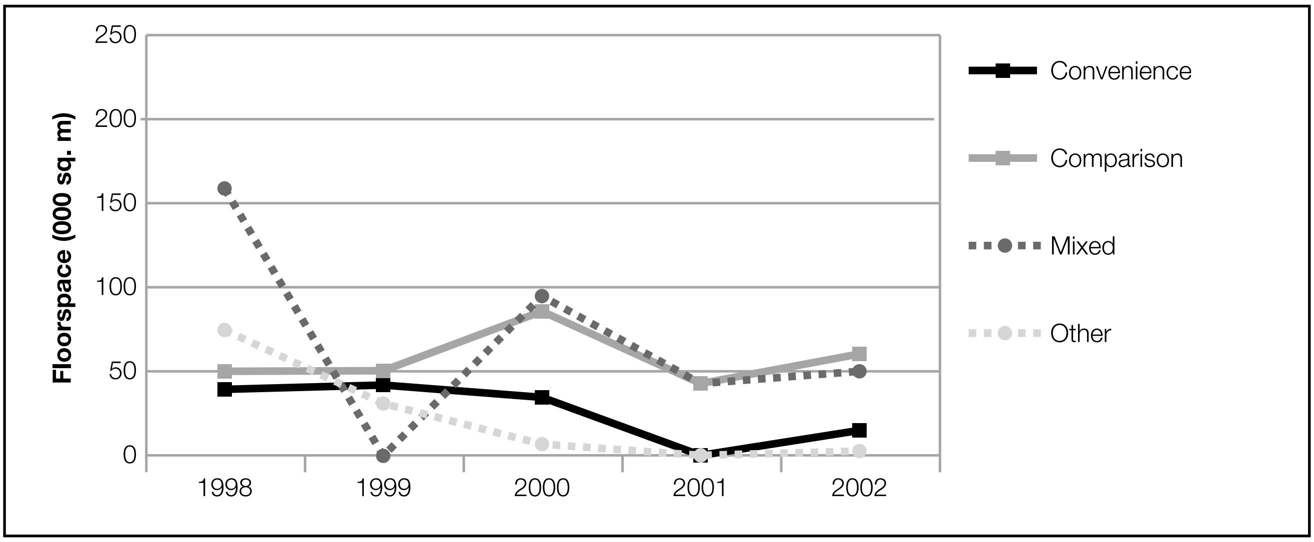
Figure 6: Approved Floorspace by Development Type



Floorspace Under Construction

6.3 Figure 7 indicates that the total amounts constructed are significantly lower than those approved for all retail types. Only mixed development exceeds 100,000 sq. m while convenience development does not exceed 50,000 sq. m.

Figure 7: Floorspace Under Construction by Development Type



Convenience

6.4 Within the convenience class, superstores have a clear dominance, although the amount approved has varied considerably. Figure 9 shows that floorspace constructed is considerably lower than the amount approved, with retail types other than superstores showing very low levels. (Refer to Annex Tables 6 and 7 for actual figures)

Figure 8: Approved Floorspace of Convenience Retail Types

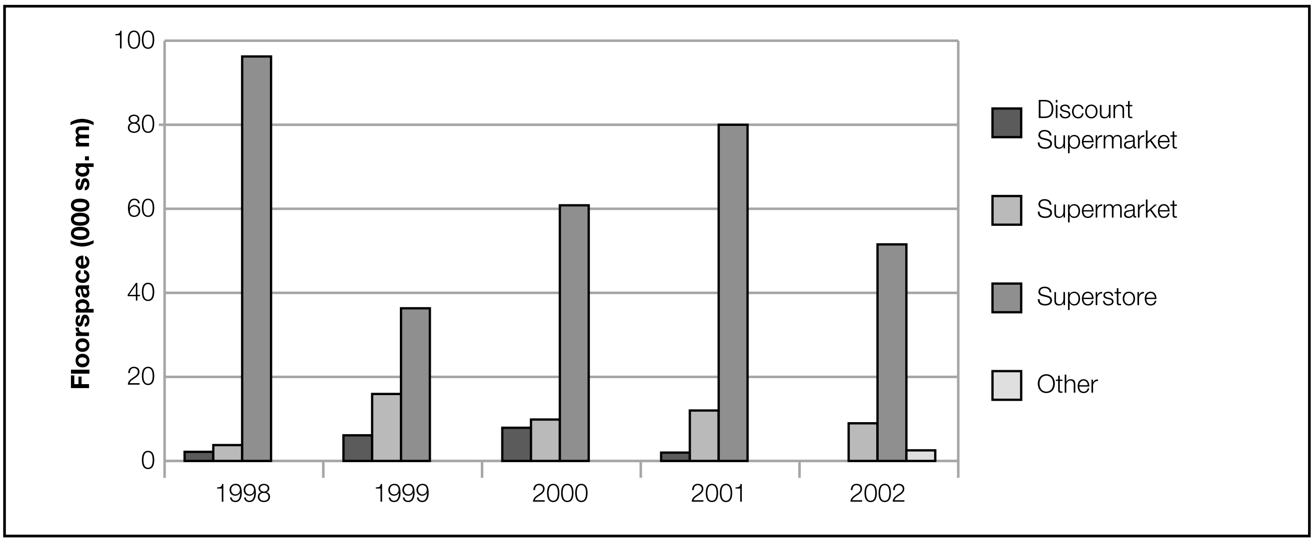
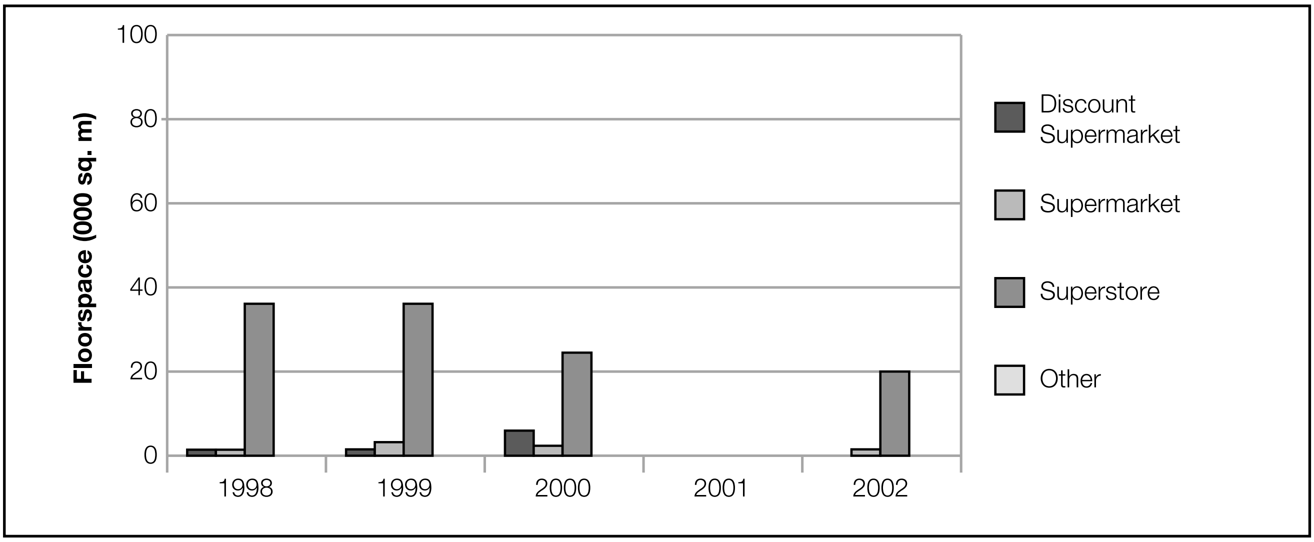


Figure 9: Floorspace Under Construction for Convenience Retail Types



Comparison

6.5 Within the comparison class, retail warehouse parks dominate the amount of floorspace approved, particularly for 1998 to 2001. However, as shown in Figure 10, the floorspace reduces significantly in 2002. Retail warehouse units show a peak in 1999 but floorspace has reduced in each subsequent year.

6.6 In terms of comparison floorspace constructed, Figure 11 shows retail warehouse park figures to be reducing from 1998 to 2001 but returning to a high in 2002. This pattern is almost opposite that of approved floorspace. The construction of retail warehouse unit floorspace is however similar to that of approvals, albeit with a years delay. (Refer to Annex, Tables 8 and 9 for actual figures)

Figure 10: Approved Floorspace of Comparison Retail Types

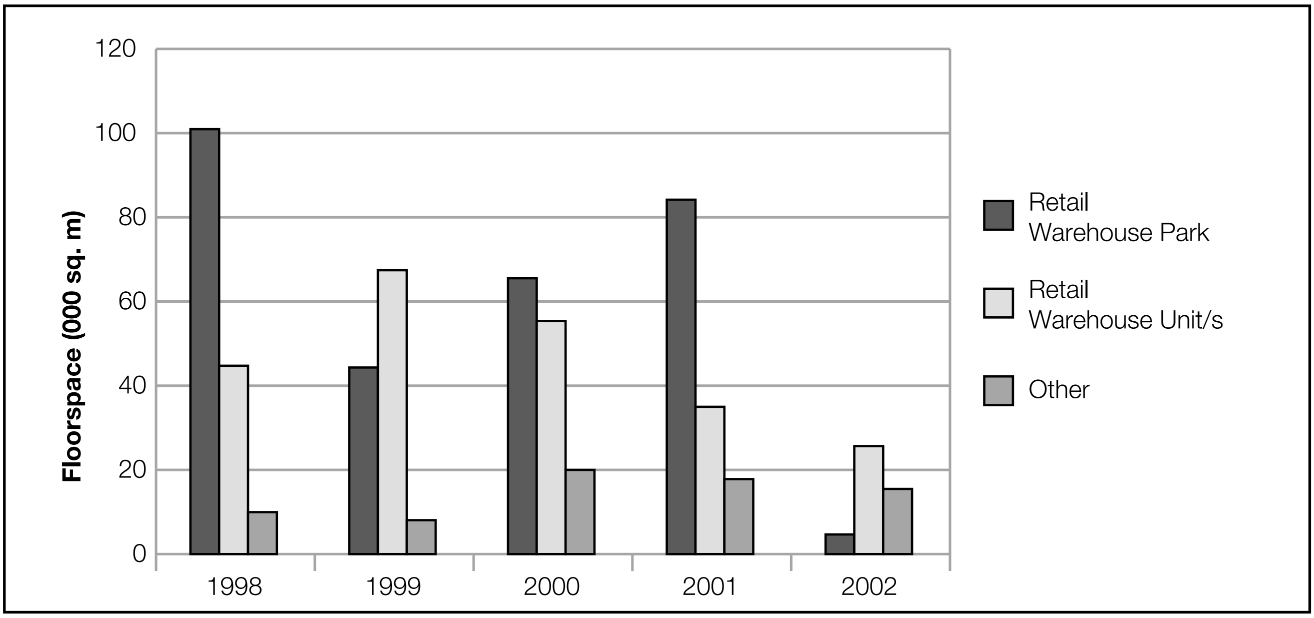
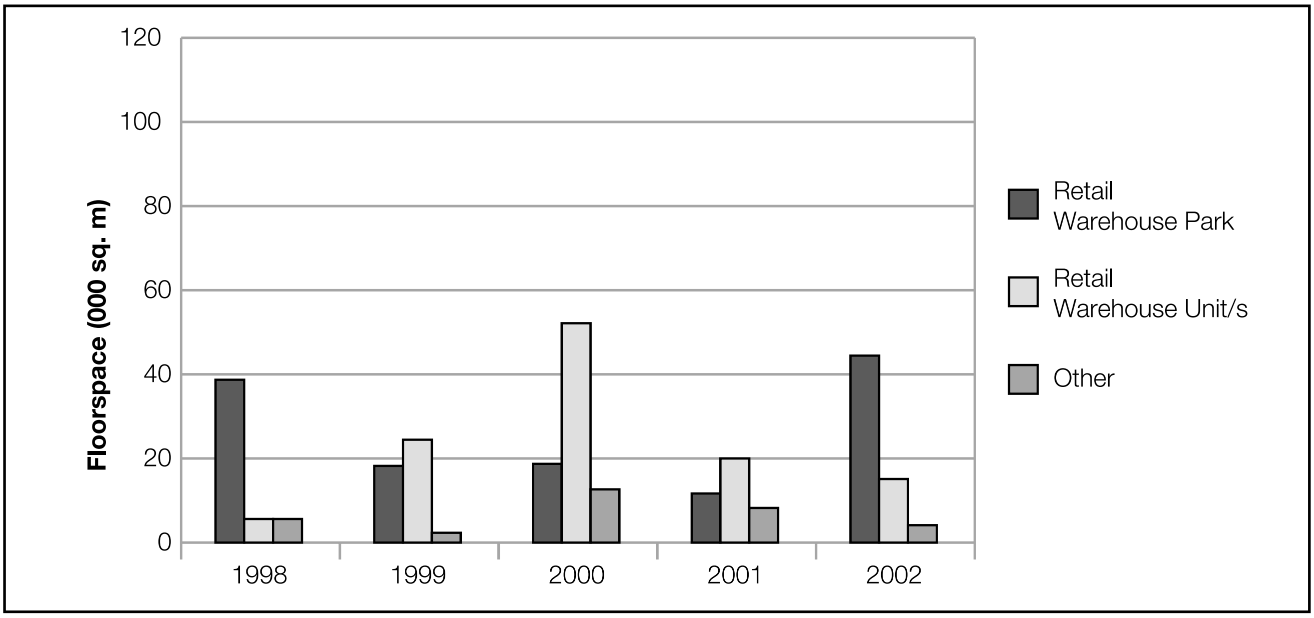


Figure 11: Floorspace Under Construction for Comparison Retail Types



Mixed

6.7 Of mixed retail types, shopping centres/malls show a clear predominance. Figure 12 shows that approved floorspace for shopping centres/malls was highest in 1998 and 2000. The amounts of floorspace approved for district/town centre infill development has been increasing to its highest level in 2002. Retail parks reached a peak in 2000.

6.8 Of the floorspace constructed for mixed retail types, only shopping centre/mall and district/town centre infill development have notable figures. Shopping centre/mall floorspace under construction averages at approximately 36,000 sq. m per year. In contrast to the floorspace approved, district/town centre infill development under construction shows a general pattern of decline. (Refer to Annex, Tables 10 and 11 for actual figures)

Figure 12: Approved Floorspace of Mixed Retail Types

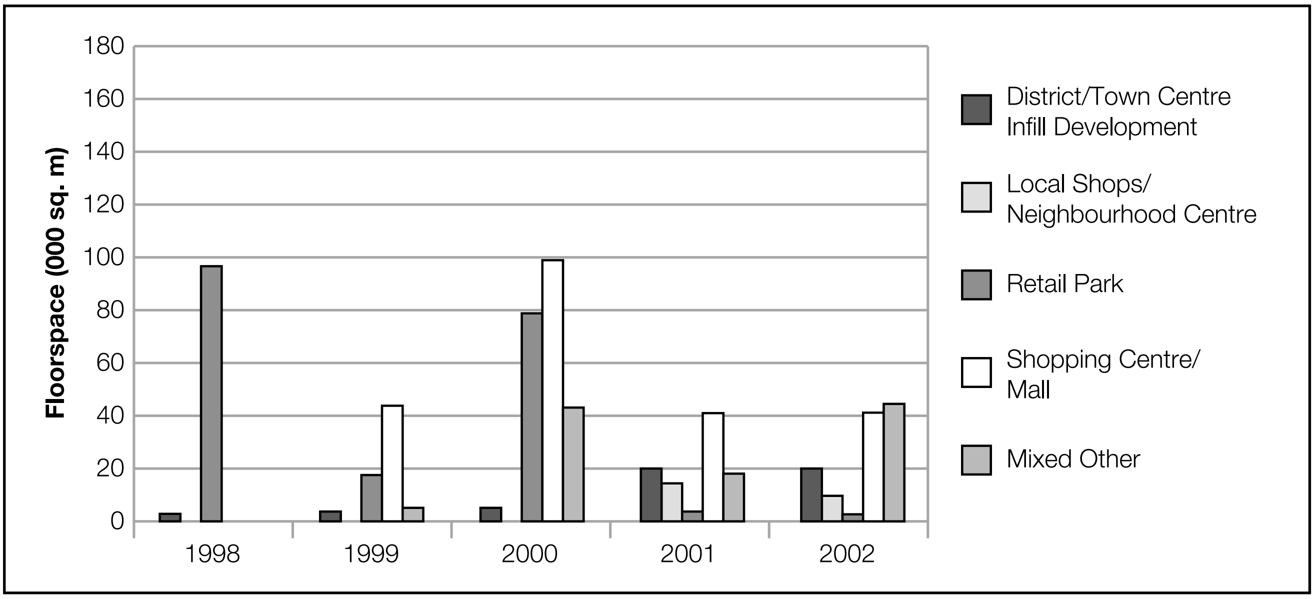
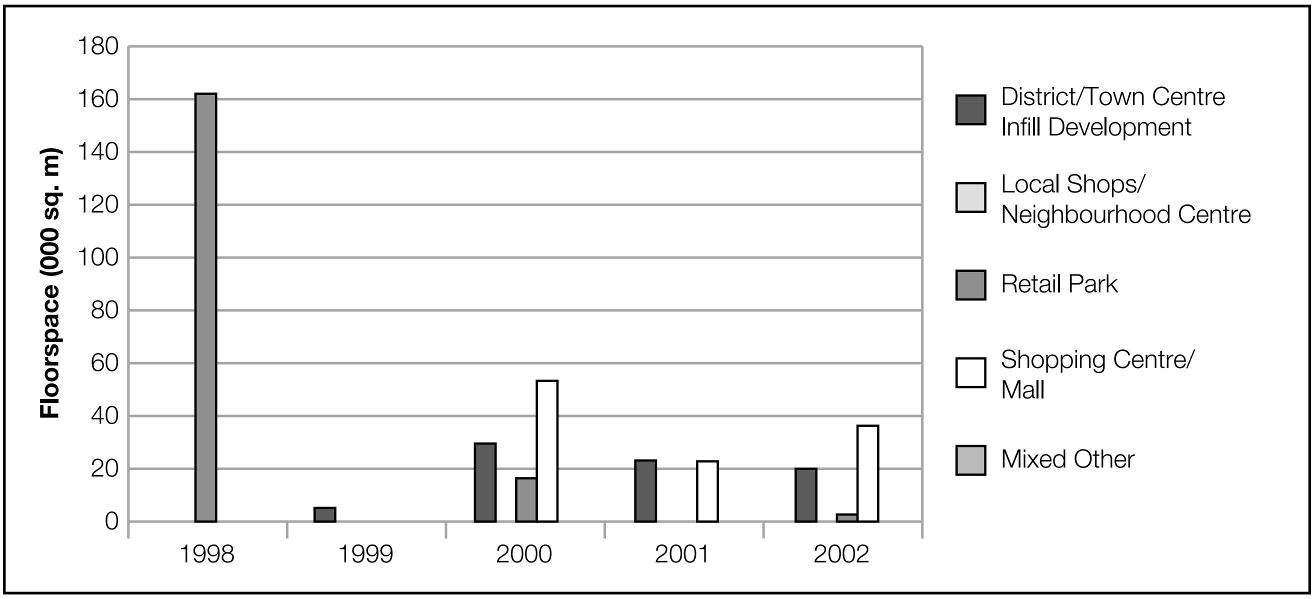


Figure 13: Floorspace Under Construction for Mixed Retail Types



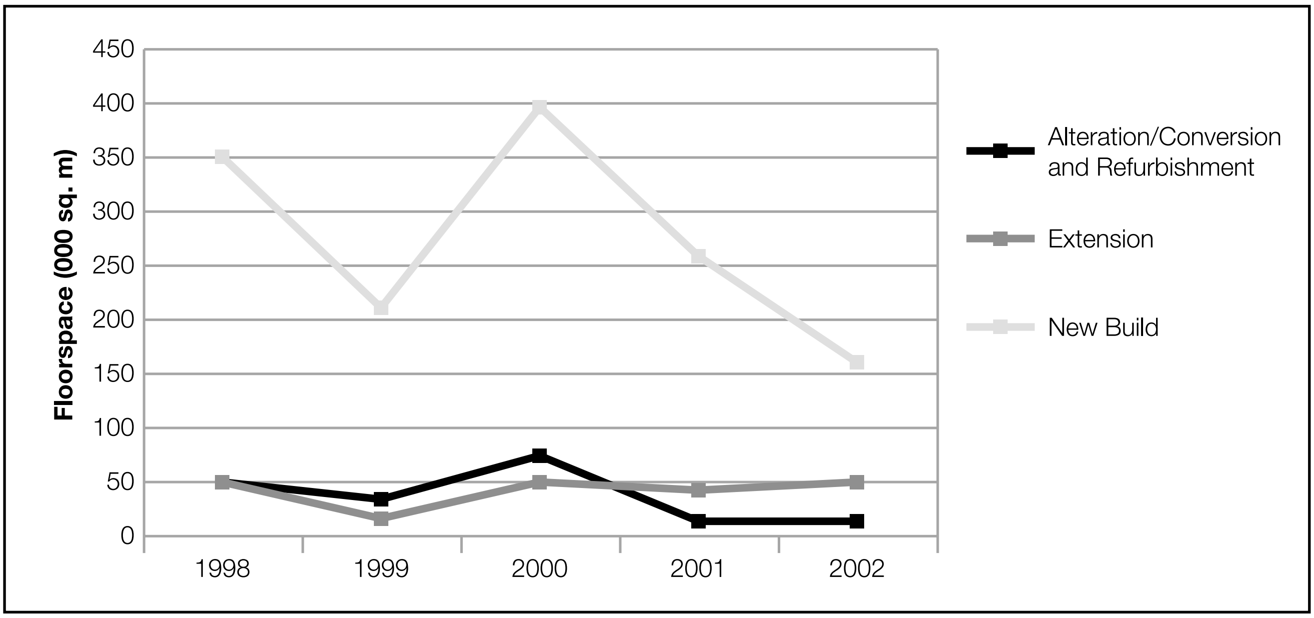
Other

6.9 Although approved and constructed, factory outlet centres floorspace was recorded in the early years of the survey it has since reduced to very low levels with only 2,000 sq. m constructed since 2000.

7. Construction Type

7.1 Figure 14 shows that new build accounts for the most approved floorspace. Floorspace amounts for extension, alteration and conversion and refurbishment have remained relatively constant, not exceeding 70,000 sq. m per year. (Refer to Annex, Table 12 for actual figures)

Figure 14: Approved Floorspace of Different Construction Types

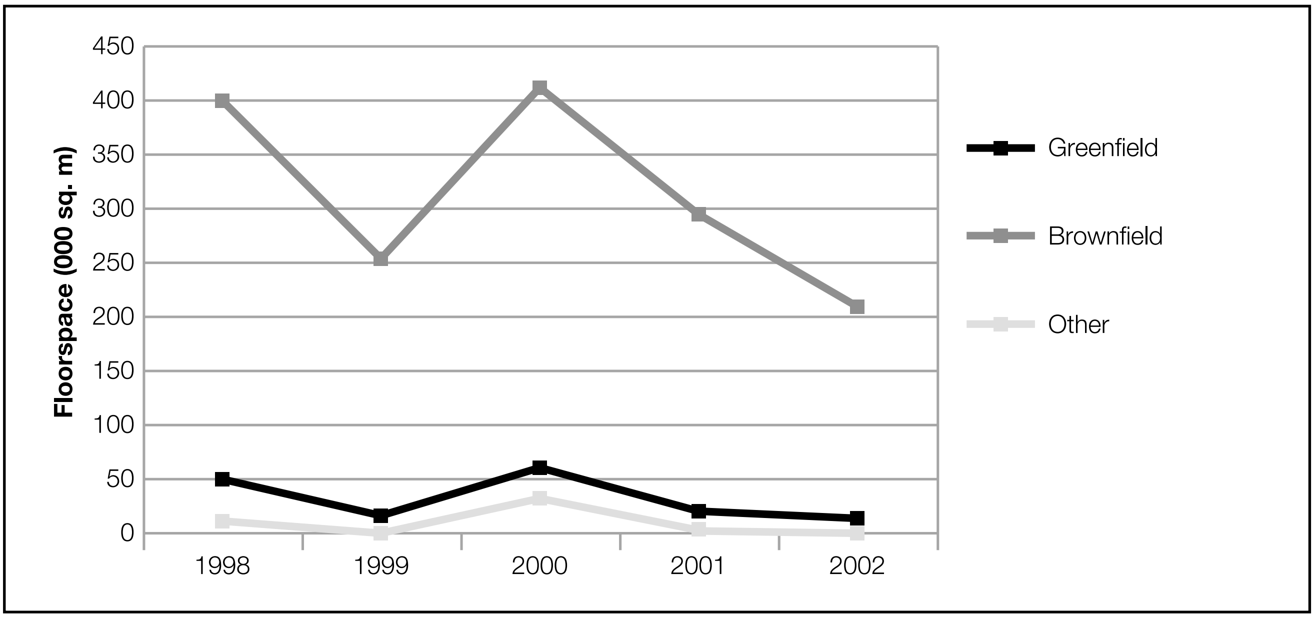


8. Location of Development

Approved

8.1 Over the years of the survey, retail approvals have been mostly in brownfield locations. Figure 15 shows a peak in 2000 but a reduction each year onwards. This, however, has not been matched by an increase in approvals in greenfield locations. These have remained relatively constant, averaging at just over 10,000 sq. m per year. (Refer to Annex, Table 13 for actual figures)

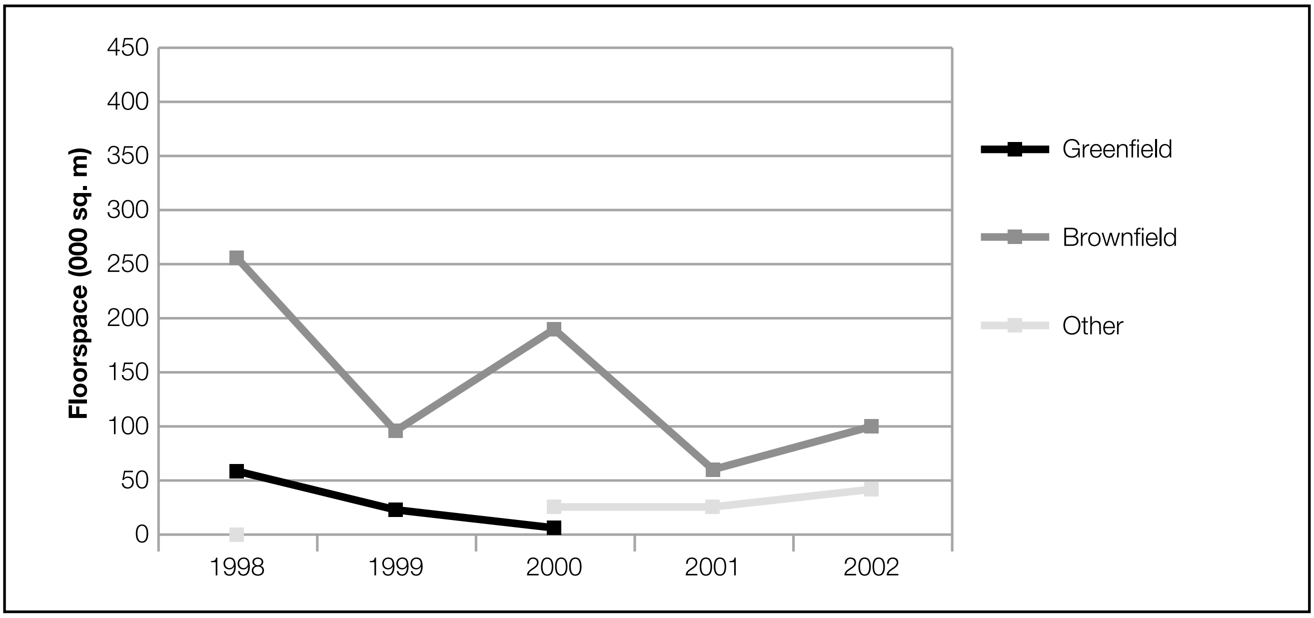
Figure 15: Approved Floorspace on Greenfield/Brownfield Sites



Under Construction

8.2 The dominance of brownfield locations continues in respect of floorspace under construction, as shown in Figure 16. The overall trend mirrors the decrease over the 5 years that is shown in approvals. Greenfield shows a reduction to the point where no retail developments over 1,000 sq. m are under construction for 2001 and 2002. (Refer to Annex, Table 14 for actual figures)

Figure 16: Floorspace Under Construction on Greenfield/Brownfield Sites

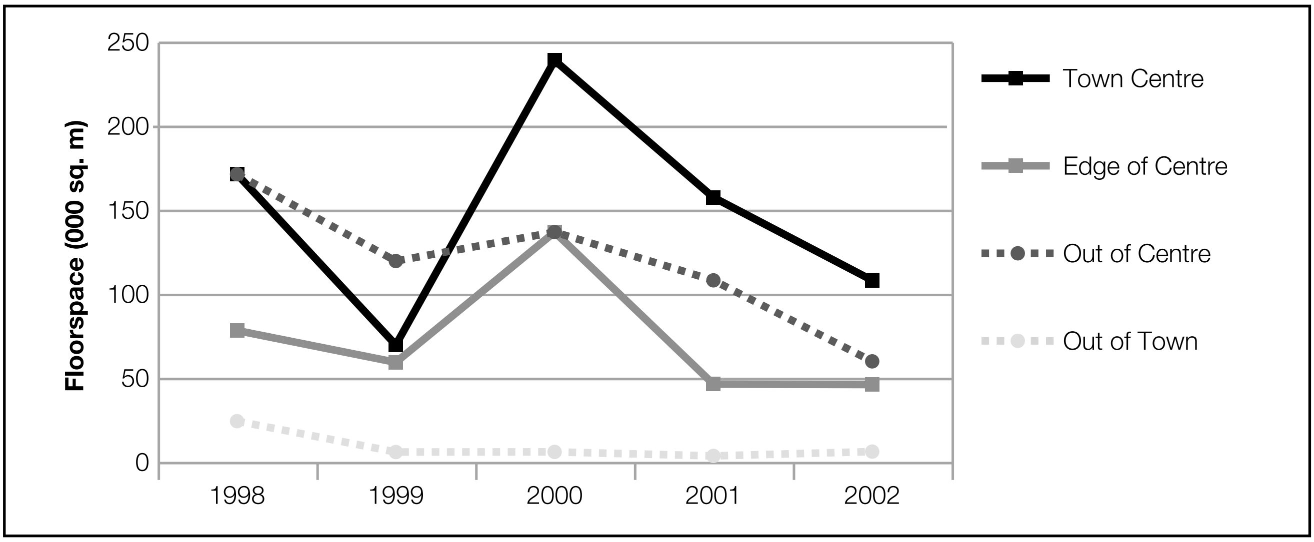


9. Sequential Location

Approved

9.1 Figure 17 shows the highest amount of approved floorspace to be in town-centre locations for all years of the survey, with the exception of 1999. Town-centre approvals peaked in 2000 but have been reducing since. Out-of-centre floorspace approvals have reduced and out of town has remained very low. (Refer to Annex, Table 15 for actual figures)

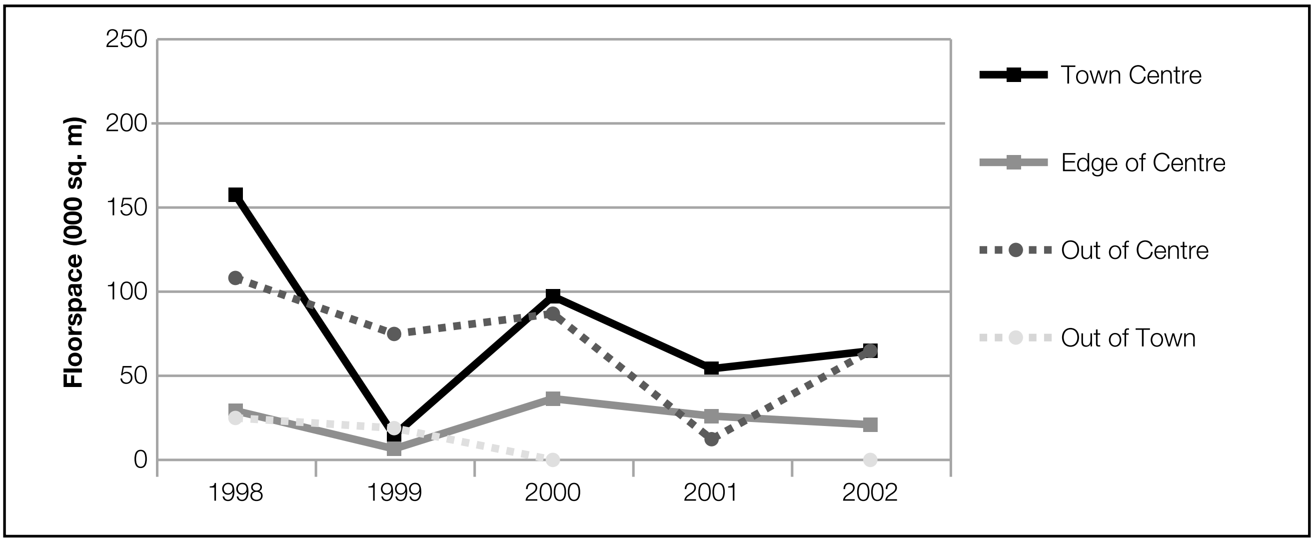
Figure 17: Approved Floorspace by Sequential Location



Under Construction

9.2 For floorspace under construction, town-centre locations peaked in 1998, with a low in 1999. Although amounts have increased since then they have remained below 100,000 sq. m. The reduction in town-centre sites is, however, not matched by an overall increase in other locations. Construction in edge-of-centre locations has been reducing since 2000 and out-of-centre locations also show an overall decline since 1998. Out-of-town developments constructed have remained low throughout the years of the survey. (Refer to Annex, Table 16 for actual figures)

Figure 18: Floorspace Under Construction by Sequential Location



Greenfield/Brownfield

9.3 Figure 19 shows that of the floorspace approved, brownfield sites are predominant in town-centre locations. Figure 20 shows the predominance of greenfield development in out of town locations. This peaked in 1998 but reduced over the following three years to where there were no retail developments over 1,000 sq. m approved on out-of-town greenfield sites. (See Annex, Tables 17 and 18 for actual figures)

Figure 19: Approved Town-Centre Applications on Greenfield/Brownfield Sites

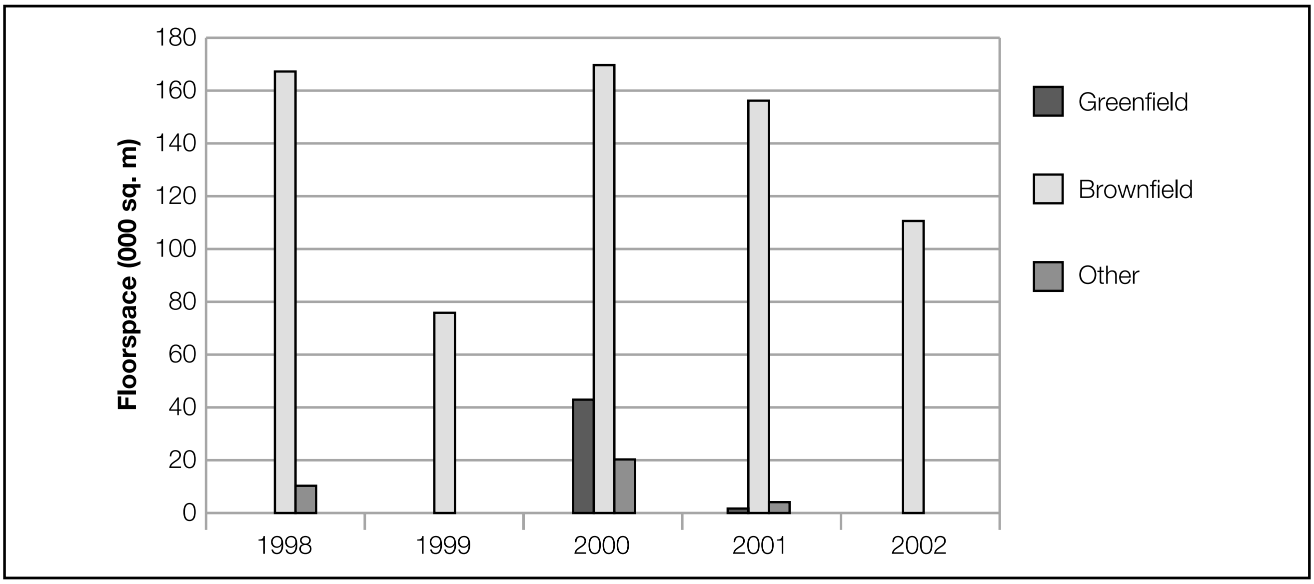
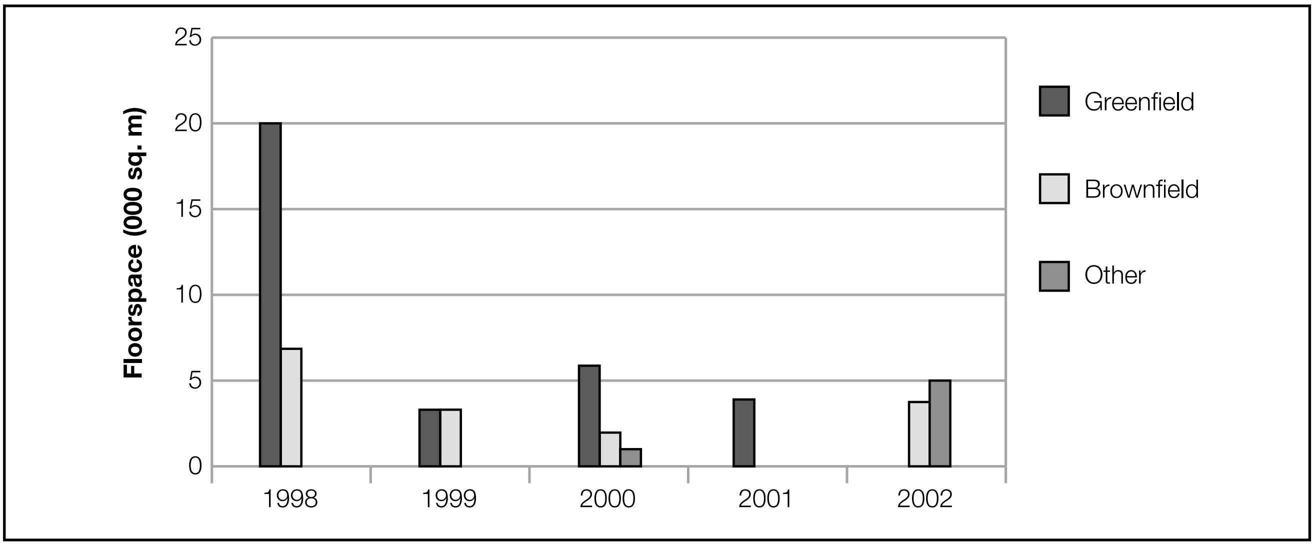


Figure 20: Approved Out-of-Town Applications on Greenfield/Brownfield Sites



10. Largest Schemes

10.1 Table 19 in the Annex shows the details of the ten largest retail schemes at each of the planning stages identified in this report over the series of the 5 years. Key trends may be summarised as follows:

10 Largest Applications: The largest floorspace recorded over the 5 years was for 93,000 sq. m. It was for a new build, mixed shopping centre/mall development in a town centre and on a brownfield site (Pollock Centre, Glasgow). This was significantly higher than the second largest recorded floorspace of 57,000 sq. m (Ravenscraig). Whilst the two largest applications over the 5 years were recorded in 2001, seven of the ten were recorded from the first 2 years of the survey. Nine were in the west of Scotland, in either Glasgow or North Lanarkshire and nine were new build developments.

10 Largest Approved: The two largest applications approved, at 35,000 sq. m, were both Cumbernauld Town Centre but are 2 years apart. Those approved were more dispersed over the 5 years of the survey than for other planning stages. Nine of the 10 were again in the west of Scotland, in either Glasgow or North Lanarkshire and eight were new build. Nine were on brownfield sites and eight were in town-centre locations.

10 Largest Refused – No Appeal: The schemes refused with no potential for appeal were smaller in size when compared to other planning stages, the largest being 22,836 sq. m (Motherwell Town Centre). These are distributed over the 5 years and over a greater variety of locations. Six of the 10 were for comparison development and seven were either out of centre or out of town.

10 Largest Refused – Potential Appeal or Inquiry: All schemes refused with the potential of appeal were recorded in 1998 or 1999 and all were for new build developments. Seven of the 10 were in the east of Scotland, with five of these being in Edinburgh. Seven were either out of centre or out of town.

10 Largest Under Construction: All of the largest schemes under construction were Glasgow, Edinburgh and Dundee. The largest three were in Glasgow, two of which were in town-centre locations (Buchanan Galleries and St Enoch Centre) but the largest, at 55,000 sq. m was out of centre (Braehead). The largest four were recorded in the first year of the survey (1998). Eight of the 10 were new build developments, seven were mixed use schemes and nine were on brownfield sites.

10 Largest Commenced Trading: The schemes which commenced trading are similar to those which were under construction but follow a few years behind. Eight of the 10 largest schemes therefore commenced trading in 1999/2000. Nine were in either the Glasgow and Clyde Valley or Lothian Structure Plan areas. Nine were new build developments and eight of the 10 were on brownfield sites.

10 Largest Withdrawn: The schemes withdrawn were smaller in size in general to the other key planning stages. Nine of the 10 were for comparison schemes, either retail warehouse units or parks. Nine were on brownfield sites and all were either in out-of-centre or out-of-town locations.

Annex

Table 1: Number of Entries by Planning Stage

	Total Entries	Submitted	Approved	Refused No Appeal	Refused – Potential Appeal	Withdrawn	Under Construction	Commenced Trading	Other
1998	227	109	77	25	22	19	30	25	6
1999	252	115	56	9	20	22	24	37	35
2000	223	72	78	14	6	10	36	44	52
2001	214	92	68	10	5	15	16	26	43
2002	209	93	46	7	5	13	24	27	51

Table 2: Floorspace by Planning Stage (sq. m)

	Total Floorspace	Submitted	Approved	Refused No Appeal	Refused – Potential Appeal	Withdrawn	Under Construction	Commenced Trading	Other
1998	1532036	599000	458000	119000	212000	113000	319000	89000	11000
1999	1617899	591000	566000	40000	124000	109000	109000	303000	314000
2000	1319957	363000	508000	73000	34000	36000	215000	203000	282000
2001	1328719	565000	325000	72000	23000	79000	84000	139000	322000
2002	1258173	495000	227000	27000	28000	56000	144000	113000	259000

Table 3: Approved Floorspace in Cities/Elsewhere (sq. m)

	Aberdeen	Dundee	Edinburgh	Glasgow	4 Cities Total	Total Approved Floorspace	Elsewhere	Cities %	Elsewhere %
1998		12000	47000	153000	212000	458000	246000	46%	54%
1999	2000	9000	54000	89000	154000	566000	412000	27%	73%
2000	60000	23000	25000	99000	207000	508000	301000	41%	59%
2001	2000	30000	24000	104000	160000	325000	165000	49%	51%
2002		6000	21000	73000	100000	227000	127000	44%	56%

Table 4: Floorspace Under Construction in Cities/Elsewhere (sq. m)

	Aberdeen	Dundee	Edinburgh	Glasgow	4 Cities Total	Total Constructed Floorspace	Elsewhere	Cities %	Elsewhere %
1998		25000	3000	172000	200000	319000	119000	63%	37%
1999		11000	24000	26000	61000	109000	48000	56%	44%
2000	8000	25000	63000	53000	149000	215000	66000	69%	31%
2001			21000	13000	34000	84000	50000	40%	60%
2002	22000	25000	42000		89000	144000	55000	62%	38%

Table 5: Floorspace of Development Type (sq. m)

	Convenience			Comparison			Mixed			Other		
	Submitted	Approved	Under Construction	Submitted	Approved	Under Construction	Submitted	Approved	Under Construction	Submitted	Approved	Under Construction
1998	157000	100000	37000	225000	155000	48000	103000	98000	164000	115000	105000	70000
1999	188000	57000	38000	143000	118000	44000	238000	73000	5000	24000	16000	23000
2000	67000	80000	32000	158000	140000	84000	131000	228000	93000	6000	60000	8000
2001	146000	93000		138000	136000	38000	260000	94000	46000	17000		
2002	134000	64000	20000	160000	44000	63000	181000	117000	56000	18000	3000	5000

Table 6: Convenience Retail Types – Floorspace Approved (sq. m)

	Discount Supermarket	Supermarket	Superstore	Other
1998	1000	3000	95000	
1999	6000	16000	35000	
2000	8000	10000	61000	
2001	2000	11000	80000	
2002		9000	51000	3000

Table 7: Convenience Retail Types – Floorspace Under Construction (sq. m)

	Discount Supermarket	Supermarket	Superstore	Other
1998	1000	1000	35000	
1999	1000	2000	35000	
2000	5000	2000	25000	
2001				
2002		1000	20000	

Table 8: Comparison Retail Types – Floorspace Approved (sq. m)

	Retail Warehouse Park	Retail Warehouse Unit/s	Other
1998	102000	44000	9000
1999	44000	65000	8000
2000	66000	54000	19000
2001	85000	33000	17000
2002	4000	26000	14000

Table 9: Comparison Retail Types – Floorspace Under Construction (sq. m)

	Retail Warehouse Park	Retail Warehouse Unit/s	Other
1998	38000	5000	5000
1999	17000	24000	2000
2000	17000	53000	13000
2001	10000	20000	8000
2002	46000	13000	4000

Table 10: Mixed Retail Types – Floorspace Approved (sq. m)

	District/Town Centre Infill Development	Local Shops/ Neighbourhood Centre	Retail Park	Shopping Centre/ Mall	Other Mixed
1998	2000			96000	
1999	3000		16000	44000	5000
2000	5000		78000	98000	43000
2001	19000	12000	4000	42000	17000
2002	20000	8000	2000	42000	45000

Table 11: Mixed Retail Types – Floorspace Under Construction (sq. m)

	District/Town Centre Infill Development	Local Shops/ Neighbourhood Centre	Retail Park	Shopping Centre/ Mall	Other Mixed
1998				164000	
1999	4000				
2000	29000		13000	51000	
2001	23000			23000	
2002	18000		2000	35000	

Table 12: Approved Floorspace by Construction Type (sq. m)

	Alteration/Conversion & Refurbishment	Extension	New Build
1998	59000	57000	345000
1999	34000	16000	216000
2000	70000	49000	389000
2001	13000	43000	267000
2002	11000	48000	170000

Table 13: Approved Floorspace on Greenfield/Brownfield Sites (sq. m)

	Greenfield	Brownfield	Other
1998	50000	396000	15000
1999	13000	249000	2000
2000	63000	415000	30000
2001	19000	290000	14000
2002	6000	214000	6000

Table 14: Floorspace Under Construction on Greenfield/Brownfield Sites (sq. m)

	Greenfield	Brownfield	Other
1998	60000	258000	3000
1999	20000	90000	
2000	6000	182000	27000
2001		63000	21000
2002		103000	41000

Table 15: Sequential Location of Approved Floorspace (sq. m)

	Town Centre	Edge of Centre	Out of Centre	Out of Town	Scotland
1998	176000	81000	173000	26000	456000
1999	74000	63000	122000	6000	265000
2000	237000	130000	132000	8000	507000
2001	161000	46000	112000	3000	322000
2002	110000	46000	63000	7000	226000

Table 16: Sequential Location of Floorspace Under Construction (sq. m)

	Town Centre	Edge of Centre	Out of Centre	Out of Town	Scotland
1998	159000	25000	113000	22000	319000
1999	13000	6000	74000	17000	110000
2000	96000	32000	85000	3000	216000
2001	51000	22000	11000		84000
2002	63000	17000	61000	3000	144000

Table 17: Approved Town Centre Floorspace in Greenfield/Brownfield Sites (sq. m)

	Greenfield	Brownfield	Other
1998		168000	8000
1999		74000	
2000	45000	169000	22000
2001	1000	154000	6000
2002		110000	

Table 18: Approved Out-of-Town Floorspace in Greenfield/Brownfield Sites (sq. m)

	Greenfield	Brownfield	Other
1998	20000	7000	
1999	3000	3000	
2000	6000	2000	1000
2001	3000		
2002		3000	5000

Table 19: Largest Retail Developments by Planning Stage

Year	Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	10 Largest Applications									
2001	93000	Pollok Centre, Cowglen Road	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre / Mall	Yes		Brownfield	Town Centre
2001	57000	Ravenscraig Motherwell	North Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre / Mall	Yes	0	Other	Out of Centre
1998	55000	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Mixed Shopping Centre / Mall	Yes	0	Brownfield	Out of Centre
1998	52000	Buchanan Galleries, City Centre	Glasgow	Glasgow & Clyde Valley	New Build	Mixed Shopping Centre / Mall	No	80	Brownfield	Town Centre
1998	35000	Town Centre, Cumbernauld	North Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed Shopping Centre / Mall	No	45	Brownfield	
1998	32515	Land Adjacent to A8/ M8 Carnbroe	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	Yes	2	Greenfield	Out of Town
1998	32111	Land to south west of junction 6, Newhouse	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	Yes	2	Greenfield	Out of Town
1998	32003	Guild Street Station	Aberdeen	Aberdeen & Aberdeenshire	New Build	Other – not listed above	Yes	37	Brownfield	Town Centre
1999	27900	Auchinlea Road	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – Other	Yes		Greenfield	Town Centre
2001	27850	Auchinlea Park (Glasgow Fort)	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – Other	Yes		Brownfield	Town Centre

Year	Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	10 Largest Approved Schemes									
1998	35000	Town Centre, Cumbernauld	North Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed Shopping Centre / Mall	No	45	Brownfield	Town Centre
2000	35000	Cumbernauld Town Centre	North Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed Shopping Centre / Mall	Yes	45	Brownfield	Town Centre
2000	32000	Guild Street Station / Union Square	Aberdeen	Aberdeen & Aberdeenshire	New Build	Other – Not listed above	Yes	38	Brownfield	Town Centre
2000	27900	Achinlea Road	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – Other	Yes		Greenfield	Town Centre
2001	27850	Auchinlea Park (Glasgow Fort)	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	Yes		Brownfield	Town Centre
2002	27850	Auchinlea Park (Glasgow Fort)	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – Other	Yes		Brownfield	Town Centre
1998	26000	St Enoch Centre, City Centre	Glasgow	Glasgow & Clyde Valley	Extension	Mixed Shopping Centre / Mall	No	0	Brownfield	Town Centre
1998	24000	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	No	14	Brownfield	Out of Centre
2002	22836	Motherwell Town Centre	North Lanarkshire	Glasgow & Clyde Valley	Extension	Mixed – Shopping Centre / Mall	Yes	50+	Brownfield	Town Centre
1999	21850	London Road / Hamilton Road	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse	No	1	Brownfield	Out of Centre

Year	Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	10 Largest Schemes Refused – No Appeal									
2001	22836	Motherwell Town Centre Redevelopment	North Lanarkshire	Glasgow & Clyde Valley	Extension	Mixed – Shopping Centre / Mall	No	50+	Brownfield	Town Centre
1998	19000	Hillington Industrial Estate	Renfrewshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	No	1	Brownfield	Out of Town
1998	14900	Shielhill/Dubford	Aberdeen	Aberdeen & Aberdeenshire	New Build	Comparison – Retail Warehouse Park	No	8	Greenfield	Out of Town
2001	14615	Motherwell Town Centre Redevelopment	North Lanarkshire	Glasgow & Clyde Valley	Extension	Mixed – Shopping Centre / Mall	No	50+	Brownfield	Town Centre
2000	11100	Land south of Heathfield Road, Ayr	South Ayrshire	Ayrshire	New Build	Comparison – Retail Warehouse Park	Yes	9	Brownfield	Out of Centre
2000	10430	Park St / Mentieth Rd, Motherwell	North Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed – Other	No	2	Brownfield	Edge of Centre
1999	10219	Dalmarnock Trading Estate, Rutherglen	South Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	No	8	Brownfield	Out of Town
1998	10200	Gilston Farm, Polmont	Falkirk	Falkirk	New Build	Other – Factory Outlet Centre	Yes	0	Greenfield	Out of Town
1998	9950	Former Tennent's Works Site, Coatbridge	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	No	8	Brownfield	Out of Centre
2000	9300	Former Van Leer Site, Kingsway West	Dundee	Dundee & Angus	New Build	Comparison – Retail Warehouse Unit	Yes	1	Brownfield	Out of Centre

Year	Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	10 Largest Refused – Potential Appeal or Inquiry									
1998	32111	Land to south west of junction 6, Newhouse	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	Yes	2	Greenfield	Out of Town
1998	23250	Princes Street Galleries	Edinburgh	Lothian	New Build	Mixed – Shopping Centre / Mall	No	70	Other	Town Centre
1999	23250	Princes Street Galleries	Edinburgh	Lothian	New Build	Mixed – Shopping Centre / Mall	Yes	100	Other	Town Centre
1998	21100	Ocean Terminal, Leith Docks	Edinburgh	Lothian	New Build	Mixed – Shopping Centre / Mall	Yes	58	Brownfield	Out of Centre
1998	19141	Links Road	Aberdeen	Aberdeen & Aberdeenshire	New Build	Comparison – Retail Warehouse Park	No	3	Brownfield	Out of Centre
1999	18600	Scott Lithgow Site, Port Glasgow	Inverclyde	Glasgow & Clyde Valley	New Build	Mixed – Retail Park	Yes	9	Brownfield	Edge of Centre
1998	17770	Kinnaird Park / Pillar	Edinburgh	Lothian	New Build	Comparison – Retail Warehouse Park	No	0	Brownfield	Out of Centre
1998	16260	Newcraighall / Chartwell (phase 3)	Edinburgh	Lothian	New Build	Comparison – Retail Warehouse Park	No	0	Other	Out of Centre
1999	15000	Shielhill/Dubford	Aberdeen	Aberdeen & Aberdeenshire	New Build	Comparison – Retail Warehouse Park	No	8	Greenfield	Out of Town
1998	14700	Cuckoo Bridge, Dumfires	Dumfries & Galloway	Dumfries & Galloway	New Build	Mixed – Retail Park	No	6	Brownfield	Out of Centre

Year	Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	10 Largest Schemes Under Construction									
1998	55000	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Mixed Shopping Centre / Mall	Yes	0	Brownfield	Out of Centre
1998	52000	Buchanan Galleries, City Centre	Glasgow	Glasgow & Clyde Valley	New Build	Mixed Shopping Centre / Mall	No	80	Brownfield	Town Centre
1998	26000	St Enoch Centre, City Centre	Glasgow	Glasgow & Clyde Valley	Extension	Mixed Shopping Centre / Mall	No	0	Brownfield	Town Centre
1998	25000	Overgate Centre	Dundee	Dundee & Angus	New Build	Mixed Shopping Centre / Mall	No	43	Brownfield	Town Centre
2000	25000	Overgate Centre	Dundee	Dundee & Angus	New Build	Mixed Shopping Centre / Mall	Yes	43	Brownfield	Town Centre
2000	24500	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	Yes	1	Brownfield	Out of Centre
1999	24200	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	No	14	Brownfield	Out of Centre
2000	22238	Harvey Nicols / The Walk. St Andrews Sq	Edinburgh	Lothian	New Build	Mixed – District / Town / City Centre Infil	Yes	24	Other	Town Centre
2000	21366	Ocean Terminal, Leith Docks	Edinburgh	Lothian	New Build	Mixed – Shopping Centre / Mall	Yes	58	Brownfield	Out of Centre
1998	20000	Argyle St / Virginia St, Glasgow City Centre	Glasgow	Glasgow & Clyde Valley	Extension	Other – Not listed above	No	1	Brownfield	Town Centre

Year	Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	10 Largest Schemes Commenced Trading									
1999	55000	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre / Mall	Yes	100	Brownfield	Out of Centre
1999	52000	Buchanan Galleries	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre / Mall	No	80	Brownfield	Town Centre
1999	26000	St Enoch Centre	Glasgow	Glasgow & Clyde Valley	Extension	Mixed – Shopping Centre / Mall	No		Brownfield	Town Centre
2000	25000	Overhead Centre	Dundee	Dundee & Angus	New Build	Mixed – Shopping Centre / Mall	Yes	43	Brownfield	Town Centre
2001	24500	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	Yes	1	Brownfield	Out of Centre
2000	24200	Braehead	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	No	14	Brownfield	Out of Centre
2001	21366	Ocean Terminal, Leith Docks	Edinburgh	Lothian	New Build	Mixed – Shopping Centre / Mall	Yes	58	Brownfield	Out of Centre
1999	18000	IKEA, Straiton	Midlothian	Lothian	New Build	Comparison – Retail Warehouse Unit	No	1	Greenfield	Out of Town
2000	17500	Phase 3 (updated) Almondvale, Livingston	West Lothian	Lothian	New Build	Other – Factory Outlet Centre	Yes	110	Brownfield	Town Centre
2000	17470	Retail Park, Almondvale Road, Livingston	West Lothian	Lothian	New Build	Comparison – Retail Warehouse Park	Yes	10	Greenfield	Town Centre

Year	Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	10 Largest Schemes Withdrawn									
2001	3.5ha	Heathfield Road, Ayr	South Ayrshire	Ayrshire	New Build	Comparison – Retail Warehouse Unit	Yes	0	Brownfield	Out of Centre
1998	32515	Land Adjacent to A8/ M8 Carnbroe	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	Yes	2	Greenfield	Out of Town
1998	19141	Links Road	Aberdeen	Aberdeen & Aberdeenshire	New Build	Comparison – Retail Warehouse Park	No	3	Brownfield	Out of Centre
1999	17770	Kinnaird Park/Pillar	Edinburgh	Lothian	New Build	Comparison – Retail Warehouse Park	No		Brownfield	Out of Centre
2000	16700	Riverford Road, Cogan Street	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	Yes		Brownfield	Out of Centre
2001	16700	Riverford Road, Cogan Road	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	Yes		Brownfield	Out of Centre
1999	16260	Newcraighall/Chartwell (phase 3)	Edinburgh	Lothian	New Build	Comparison – Retail Warehouse Park	No		Brownfield	Out of Centre
1999	11354	Kinnaird Park/Pillar	Edinburgh	Lothian	New Build	Comparison – Retail Warehouse Park	Yes		Brownfield	Out of Centre
2002	10500	Edmiston Drive, Helen Street	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit	No	1	Brownfield	Out of Centre
1998	9300	Renfrew Road/ Wallneuk	Renfrewshire	Glasgow & Clyde Valley	New Build	Mixed Retail Park	Yes	3	Brownfield	Out of Centre

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