SCOTTISH EXECUTIVE
Development Department

Retail
Development Survey

2002

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Retail Development Survey

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Contents

1. Introduction and Summary

1.1 This report summarises the results of the 2002 Scottish Retail Development Survey. The Survey is a co-operative effort between local authorities and the Scottish Executive Development Department. It involves the monitoring of all retail developments over 1,000 sq. m (gross) which are recorded as ‘active’ by local authorities during the calendar year (A guide to different planning stages is set out in Figure 1 overleaf). All 32 local authorities provided returns, although 4 (Eilean Siar, Orkney Islands, Scottish Borders and the Shetland Islands) registered a nil return for the year.

1.2 The following main points emerge from the 2002 survey (all figures have been rounded to the nearest ’000 sq. m):

- **Number of entries:** During the year, 209 retail developments were recorded as being ‘active’ at some stage of the planning process, the lowest amount of all 5 years. (Refer to table 1)
- **Distribution of entries:** Glasgow and Clyde Valley and Lothian Structure Plan areas together accounted for some 52% of all entries (compared to 50% in 2001 and 57% in 2000). (Refer to table 2)
- **Applications:** 93 retail planning applications were submitted, proposing 495,000 sq. m floorspace. This is a similar number to 2001 but 7,000 sq. m less in terms of floorspace. (Refer to tables 1 and 3).
- **Refusals:** 7 applications (for 27,000 sq. m) were refused consent without the possibility of further appeal, and a further 5 applications (for 28,000 sq. m) were refused consent, pending the prospect of further appeal, public inquiry or call-in. (Refer to tables 1 and 3)
- **Retail Format:** The most applications submitted in terms of number and size was for superstores (28/112,000 sq. m). (Refer to table 7)
- **Sequential Approach:** More floorspace was approved in town centre/edge of centre locations (156,000 sq. m) than elsewhere (7,000 sq. m). Most refusals were in edge of centre and out of centre locations. (Refer to table 13)
- **Sequential Approach and Retail Format:** Most ‘mixed’ retail development was in town centre/ edge of centre locations (103,000 sq. m out of a total of 116,000 sq. m). Most comparison development returned this year to out of centre/out of town locations (27,000 sq. m out of a total of 45,000 sq. m). (Refer to tables 6,18 and 19)
- **Brownfield Development:** Brownfield locations have dominated over greenfield locations for the whole 5 years of this survey and at all stages – 91% approvals, 80% applications, 73 % of those developments newly trading. (Refer to tables 11, 16 and 17)
- **Under Construction:** 24 qualifying retail developments (for 144,000 sq. m) were under construction during 2002 (compared to 16 covering 84,000 sq. m 2001 and 36 covering 215,000 sq. m in 2000). (Refer to table 1)
- **Newly Trading:** 27 new developments (113,000 sq. m) began trading (compared to 26 covering 139,000 sq. m in 2001 and 44 covering 203,000 sq. m in 2000). The highest amount were located in Edinburgh, North Lanarkshire, Glasgow and Perth and Kinross. (Refer to tables 1 and 3).

1.3 Broad comparisons with 1998, 1999, 2000 and 2001 data are set out in figures 2 to 5.

2. Background/Methodology

2.1 The Scottish Executive Development Department considers that a monitoring system for retail development within Scotland is desirable in order to:

(a) Provide the basis for annual retail monitoring reports.
(b) Assist the review of the performance of planning policy and its implementation.
(c) Provide a mechanism by which specific questions can be answered on retail planning and development in Scotland.

2.2 Following research into the design, content and implementation of a suitable system (Monitoring of Retail Developments, Scottish Office Central Research Unit, 1998), an inaugural survey (covering 1998) was carried out and published in November 2000. Results of the 2001 survey are to be published alongside this document.

2.3 This bulletin is the product of the fifth annual survey. It summarises information gathered from the 32 Scottish local authorities about all significant retail developments that were in the planning system, under construction or which commenced trading during 2002. Figure 1 is a guide to the planning stages used.

2.4 The data has been analysed to identify and present the statistics and trends outlined in this bulletin. It is hoped that the information will be of use to planning authorities, developers and others wishing to identify market trends across Scotland. Where applicable, the information will also be used to assess the effectiveness of planning policy, including NPPG8 (revised).

2.5 The information is presented in the same way as in the earlier reports to allow for comparison.

Figure 1: Planning Stages Recorded by Local Authorities

1. Planning application submitted. Outline or detailed planning application has been submitted (and registered).
2. Potential appeal or inquiry. Planning authority has refused planning permission and there is the potential for an appeal, or an appeal has been held but the decision is still awaited. This also includes inquiries to be held, or awaiting decision, following call-in by the Scottish Ministers.
3. Planning permission refused. No prospect of appeal as a result of time lapse or dismissal of appeal.
4. Planning permission granted (outline or detailed).
5. Planning application withdrawn. Application for retail scheme has been submitted but subsequently withdrawn prior to a planning decision.
6. No decision. Outline or detailed planning application has been submitted (and registered) either during the year or in previous years, but no decision was made during the calendar year.
7. Development under construction. Following grant of planning permission in detail or approval of all reserved matters, development works have commenced on site but scheme is not trading.
8. Development commenced trading following completion of part or whole development.
9. Any other status of development proposal not included in the above.

3. Number of Retail Developments

3.1 Table 1 summarises the number of retail developments recorded by each local authority in 2002, in terms of the planning stage reached.

Table 1: Planning Stage by Local Authority

Local Authority	Total Entries	Application Submitted	Approved	Refused – No Appeal	Refused – Potential Appeal/Inquiry	Withdrawn	Under Construction	Commenced Trading	Other
Aberdeen City	15	5		1		3	2		4
Aberdeenshire	6	3	3		1				2
Angus	7	6	2			1			4
Argyll and Bute	3	3							3
Clackmannanshire	3	1						2	
Dumfries and Galloway	6	6	2	1			1	2	1
Dundee City	11	2	1		1	2	2		3
East Ayrshire	2	1							
East Dunbartonshire	1	1							
East Lothian	1	1							
East Renfrewshire	1							1	
Edinburgh, City of	24	8	5			1	9	7	10
Eilean Siar									
Falkirk	5	3	1						4
Fife	9	3							
Glasgow City	26	3	12	2		1		3	5
Highland	5	3	2						
Inverclyde	4	1							3
Midlothian	5	1	1	1	1	1			2
Moray	5	2					1	1	1
North Ayrshire	1	1							1
North Lanarkshire	11	6	3				2	3	5
Orkney Islands									
Perthshire and Kinross	9	1	1			1	3	4	2
Renfrewshire	11	2	3	1		2	2		1
Scottish Borders									
Shetland Islands									
South Ayrshire	7	4	1		1			1	5
South Lanarkshire	14	13	3		1		1	1	
Stirling	6	2	1	1			1	1	3
West Dunbartonshire	8	8	2			1			5
West Lothian	3	3	3					1	
Scotland	**209**	**93**	**46**	**7**	**5**	**13**	**24**	**27**	**64**

Notes: *(a) It is important to note that this table does not permit conclusions to be drawn regarding the rate of approval/refusal for each local authority. The table provides a snapshot of planning activity throughout 2002. It does not indicate, that in the case of Aberdeenshire for example, the local authority received three applications and approved them all. It merely represents the level of activity in each category during the year. None of the planning stages identified is expressed as a proportion of the total number of applications submitted. Furthermore, the total number of entries for each local authority will not necessarily equal the value in each category, as any given scheme may have been at more than one stage during the course of the year and, as a result, may have two or more entries.*
(b) 'Other' generally refers to applications made in an earlier year and not yet decided, or where an earlier approval has not yet been implemented.

3.2 The table shows that Glasgow had the highest number of recorded entries for the year (26), followed by Edinburgh (24) and Aberdeen (15). Edinburgh and Glasgow have featured each year to date.

3.3 In total, the number of applications refused was 12. This number has continued to decline since 1998. 24 retail developments were under construction, increasing on last year, back to previous levels. Newly trading developments are close in number to 2001 but continue the trend in decreasing floorspace since 1999. Edinburgh had the highest number of developments under construction (9), followed by Perthshire and Kinross (3). Edinburgh also has the highest number of newly trading developments (7) and again followed by Perthshire and Kinross (4).

3.4 Table 2 illustrates that planning applications and approvals were concentrated in the Glasgow and Clyde Valley Structure Plan area. There was also significant activity in the Aberdeen/Aberdeenshire Structure Plan area.

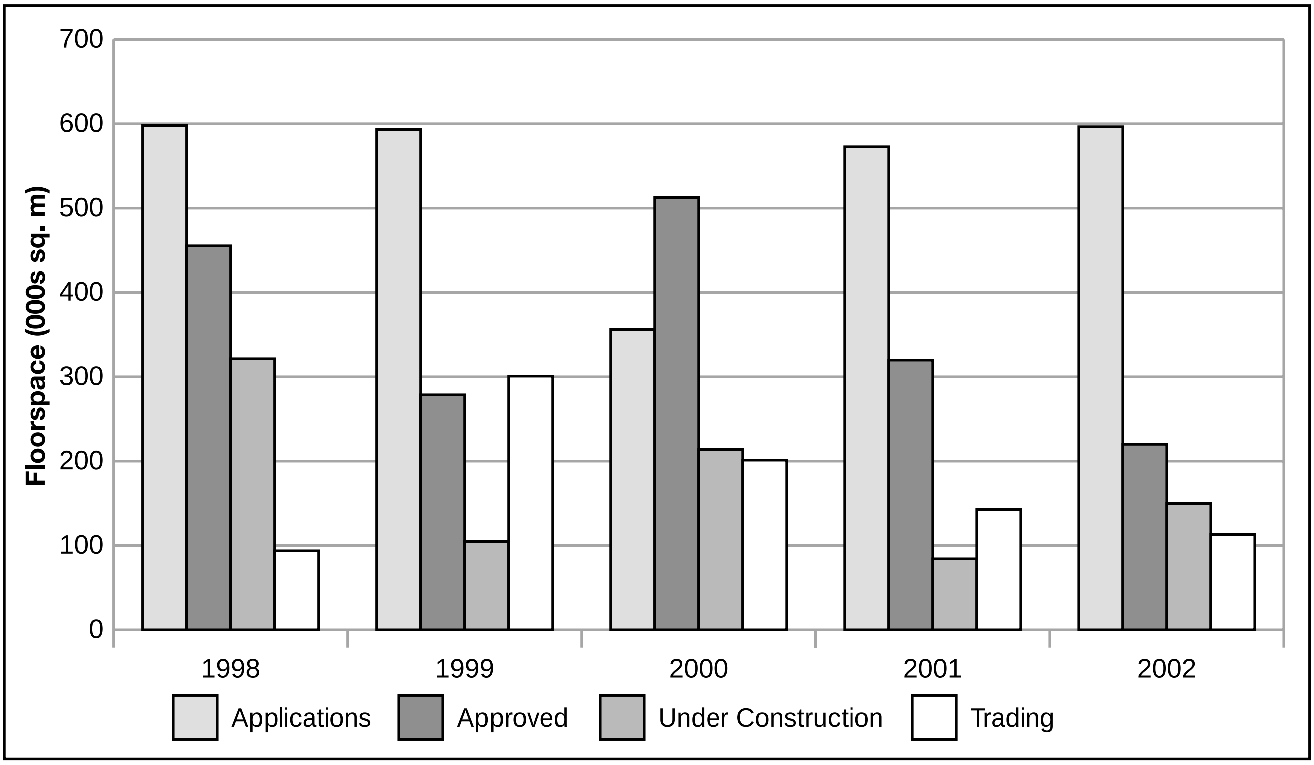
Table 2: Planning Stage by Structure Plan Area

Structure Plan Area	Total Entries	Application Submitted	Approved	Refused – No Appeal	Refused – Potential Appeal/Inquiry	Withdrawn	Under Construction	Commenced Trading	Other
Aberdeen/Aberdeenshire	21	8	3	1	1	3	2		6
Argyll and Bute	3	3							3
Ayrshire	10	6	1		1			1	6
Dumfries and Galloway	6	6	2	1			1	2	1
Dundee and Angus	18	8	3		1	3	2		7
Eilean Siar									
Falkirk	5	3	1						4
Fife	9	3							
Glasgow and Clyde Valley	76	34	23	3	1	4	5	8	19
Highland	5	3	2						
Lothian	33	13	9	1	1	2	9	8	12
Moray	5	2					1	1	1
Orkney									
Perthshire and Kinross	9	1	1			1	3	4	2
Scottish Borders									
Shetland									
Stirling and Clackmannan	9	3	1	1			1	3	3
Scotland	**209**	**93**	**46**	**7**	**5**	**13**	**24**	**27**	**64**

4. Retail Floorspace[1]

4.1 Table 3 indicates the amount of floorspace at each planning stage in each authority. Glasgow dominates in terms of number of entries and floorspace approved and refused no appeal. Other areas are now challenging this dominance for floorspace applications submitted (Fife, 41,000 sq. m), refused potential appeal (South Lanarkshire, 10,000 sq. m) and under construction (Edinburgh, 42,000 sq. m). General comparisons with previous years are shown in Figure 2.

Figure 2: Floorspace by Planning Stage



1 Floorspace totals for Scotland may not be the same when comparing Local Authority areas with Structure Plan areas due to individual areas being rounded to the nearest 1000.

Table 3: Planning Stage by Local Authority (Floorspace – sq. m)

Local Authority	Total Entries	Application Submitted	Approved	Refused – No Appeal	Refused – Potential Appeal/Inquiry	Withdrawn	Under Construction	Commenced Trading	Other
Aberdeen City	15	40000		6000		14000	22000		22000
Aberdeenshire	6	10000	9000		5000				
Angus	7	25000	4000			4000			
Argyll and Bute	3	6000							
Clackmannanshire	3	3000						6000	6000
Dumfries and Galloway	6	22000	4000	3000			2000	10000	12000
Dundee City	11	7000	6000		4000	8000	25000		25000
East Ayrshire	2								
East Dunbartonshire	1	10000							
East Lothian	1	3000							
East Renfrewshire	1							1000	1000
Edinburgh, City of	24	40000	21000			6000	42000	34000	77000
Eilean Siar									
Falkirk	5	16000	8000						
Fife	9	41000							
Glasgow City	26	12000	73000	10000		11000		15000	15000
Highland	5	10000	7000						
Inverclyde	4	3000							
Midlothian	5	5000	5000	5000	5000	7000			
Moray	5	10000					6000	3000	10000
North Ayrshire	1	3000							
North Lanarkshire	11	49000	35000				10000	18000	29000
Orkney Islands									
Perthshire & Kinross	9	21000	3000			3000	11000	13000	24000
Renfrewshire	11	14000	16000	1000		3000	3000		3000
Scottish Borders									
Shetland Islands									
South Ayrshire	7	26000	2000		4000			4000	4000
South Lanarkshire	14	86000	24000		10000		19000	3000	22000
Stirling	6	4000	2000	2000			4000	4000	7000
West Dunbartonshire	8	24000	3000						
West Lothian	3	5000	5000					2000	2000
Scotland	**209**	**495000**	**227000**	**27000**	**28000**	**56000**	**144000**	**113000**	**259000**

4.2 Table 4 sets out the floorspace totals at the different planning stages for each of the major cities. This year the total number of entries is lower than 2001 and therefore the lowest of all 5 years to date. The change away from Glasgow's dominance is notable in a number of stages.

Table 4: Major Scottish Cities, Retail Floorspace Comparison (Floorspace – sq. m)

Local Authority	Total Entries	Application Submitted	Approved	Refused – No Appeal	Refused – Potential Appeal/Inquiry	Withdrawn	Under Construction	Commenced Trading	Other
Aberdeen City	15	40000		6000		14000	22000		22000
Dundee City	11	7000	6000		4000	8000	25000		25000
Edinburgh, City of	24	40000	21000			6000	42000	34000	77000
Glasgow City	26	12000	73000	10000		11000		15000	15000
Scotland	**76**	**99000**	**100000**	**16000**	**4000**	**39000**	**89000**	**49000**	**139000**

4.3 Table 5 sets out the amount of retail floorspace at the different planning stages across Structure Plan areas. As in the previous three years Glasgow and Clyde Valley Structure Plan area had the highest level of floorspace in submitted applications, as well as approved, total refused and newly trading. Lothian had the highest level of floorspace under construction.

Table 5: Planning Stage by Structure Plan Area (Floorspace – sq. m)

Structure Plan Area	Total Entries	Application Submitted	Approved	Refused – No Appeal	Refused – Potential Appeal/Inquiry	Withdrawn	Under Construction	Commenced Trading	Other
Aberdeen/Aberdeenshire	21	50000	9000	6000	5000	14000	22000		22000
Argyll and Bute	3	6000							
Ayrshire	10	29000	2000		4000			4000	4000
Dumfries and Galloway	6	22000	4000	3000			2000	10000	12000
Dundee and Angus	18	32000	10000		4000	13000	25000		25000
Eilean Siar	0								
Falkirk	5	16000	8000						
Fife	9	41000							
Glasgow and Clyde Valley	76	197000	151000	11000	10000	14000	33000	38000	71000
Highland	5	10000	7000						
Lothian	33	53000	30000	5000	5000	13000	42000	36000	79000
Moray	5	10000					6000	3000	9700
Orkney	0								
Perthshire and Kinross	9	21000	3000			3000	11000	13000	24000
Scottish Borders	0								
Shetland	0								
Stirling and Clackmannan	9	7000	2000	2000			4000	10000	14000
Scotland	**209**	**494000**	**226000**	**27000**	**28000**	**57000**	**145000**	**114000**	**260700**

5. Type of Development

5.1 Table 6 (overleaf) sets out the level of floorspace submitted, approved, refused and under construction during 2002, across all local authorities for a range of retail 'types'. The retail types are classed as *convenience*, *comparison*, *mixed* and *other*, and comprise the following types of retail format:

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	

5.2 The table shows that most of the submitted floorspace involved mixed (181,000 sq. m) or comparison development (160,000 sq. m). Submitted applications for convenience floorspace totalled 134,000 sq. m showing a continued decrease over the 4 years since 1999.

5.3 Most floorspace approved was for mixed (117,000 sq. m). This is almost twice as much as for approved convenience floorspace (64,000 sq. m) and over twice as much as comparison floorspace (44,000 sq. m). The highest amount refused consent without the prospect of further appeal was for convenience formats (181,000 sq. m). Most floorspace under construction was for comparison (63,000 sq. m) or mixed (56,000 sq. m).

Figure 3: Type of Retail Activity Approved

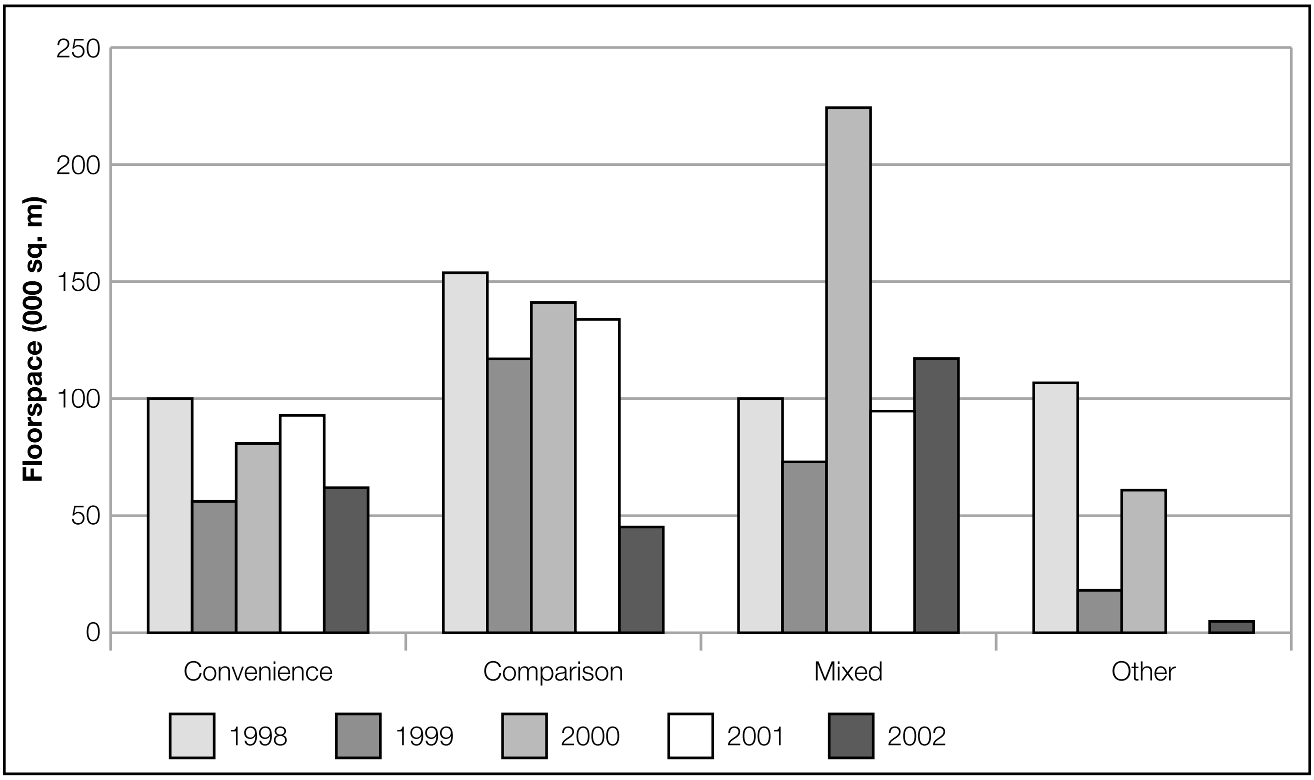


Table 6: Retail Type by Planning Stage and Local Authority (Floorspace – sq. m)

Local Authority	Convenience				Comparison				Mixed				Other			
	Submitted	Approved	Refused – No Further Appeal	Under Construction	Submitted	Approved	Refused – No Further Appeal	Under Construction	Submitted	Approved	Refused – No Further Appeal	Under Construction	Submitted	Approved	Refused – No Further Appeal	Under Construction
Aberdeen City	8000		6000		9000			22000	23000							
Aberdeenshire		4000			3000				7000	5000						
Angus	16000				4000	4000			5000							
Argyll and Bute	1000				3000								1000			
Clackmannanshire					3000											
Dumfries and Galloway	7000	2000			13000		3000		2000	2000		2000				
Dundee City		6000						25000	7000							
East Ayrshire																
East Dunbartonshire					10000											
East Lothian	3000															
East Renfrewshire																
Edinburgh, City of	16000	12000		5000	15000	4000		6000	9000	6000		31000				
Eilean Siar																
Falkirk	16000	8000														
Fife					19000				22000							
Glasgow City		9000	10000		12000	13000				51000						
Highland	4000	7000			6000											
Inverclyde	3000															
Midlothian					5000	5000	5000									
Moray	2000			6000	8000											
North Ayrshire	3000															
North Lanarkshire	9000	3000			19000	9000		10000	21000	23000						

	Submitted	Approved	Refused – No Further Appeal	Under Construction	Submitted	Approved	Refused – No Further Appeal	Under Construction	Submitted	Approved	Refused – No Further Appeal	Under Construction	Submitted	Approved	Refused – No Further Appeal	Under Construction
Orkney Islands																
Perthshire and Kinross				8000					21000					3000		3000
Renfrewshire	12000	10000		1000			1000			6000			2000			2000
Scottish Borders																
Shetland Islands																
South Ayrshire	2000	2000			5000				14000				6000			
South Lanarkshire	9000				22000	5000			45000	19000		19000	9000			
Stirling	1000		2000		2000	2000						4000				
West Dunbartonshire	22000	1000			2000	2000										
West Lothian									5000	5000						
Scotland	**134000**	**64000**	**18000**	**20000**	**160000**	**44000**	**9000**	**63000**	**181000**	**117000**	**0**	**56000**	**18000**	**3000**	**0**	**5000**

5.5 Table 7 provides a more detailed breakdown of retail format to identify the amounts of floorspace involved at each of the key planning stages.

Table 7: Retail Format by Key Planning Stage (Floorspace – sq. m)

Retail Format	Planning Application Submitted No.	Planning Application Submitted Sq. m	Approved No.	Approved Sq. m	Refused – No Further Appeal No.	Refused – No Further Appeal Sq. m	Under Construction No.	Under Construction Sq. m
Convenience								
Discount Supermarket	2	3000			1	2000		
Supermarket	7	19000	4	9000			1	1000
Superstore	28	112000	12	51000	2	14000	6	20000
Other			1	3000	1	3000		
Comparison								
Retail Warehouse Park	8	45000	2	4000			4	46000
Retail Warehouse Unit(s)	19	111000	6	26000	3	9000	2	13000
Other	3	4000	6	14000			2	4000
Mixed								
District/Town Centre Infill Development	4	9000	5	20000			3	18000
Individual Unit								
Local Shops/Neighbourhood Centre	3	13000	2	8000				
Retail Park	6	54000	1	2000			1	2000
Shopping Centre/Mall	9	104000	2	42000			3	35000
Other Mixed			4	45000				
Other								
Factory Outlet Centre	1	2000					1	2000
Retail Warehouse Club								
Not known								
Not listed above	3	17000	1	3000			1	3000
Scotland	**93**	**493000**	**46**	**227000**	**7**	**28000**	**24**	**144000**

5.6 The table shows that, across Scotland, there were more applications submitted (28) for the development of superstore floorspace than for any other retail format. For mixed shopping centre/mall the number of submitted applications increased slightly on 2001 figures but the total floorspace was less. Figures for factory outlet centres only showed refusals in 2001 whilst figures are included for submission and construction in 2002.

5.7 Most approvals involved convenience superstores (12 totalling 51,000 sq. m). Other mixed and mixed shopping centre/mall had slightly lower levels with 45,000 sq. m and 42,000 sq. m respectively. Convenience superstore also had the highest amount of floorspace refused (141,000 sq. m).

5.8 Table 8 provides a comparison of the highest cumulative totals across key planning stages between the four combined major cities and the rest of Scotland.

Table 8: Retail Format – Major City/Non-City Comparison (Floorspace – sq. m)

	Application Submitted	Approved	Refused – No Further Appeal	Under Construction
Aberdeen, Dundee, Edinburgh, Glasgow combined				
Retail Warehouse Park	15000			46000
Mixed Shopping Centre/Mall	7000			13000
Retail Warehouse Units	21000	4000		3000
Convenience Superstore	8000	22000	14000	4000
Factory Outlet Centre	0			
Other Local Authorities				
Retail Warehouse Park	30000	4000		
Mixed Shopping Centre/Mall	97000	42000		23000
Retail Warehouse Units	90000	22000	9000	9000
Convenience Superstore	104000	29000		16000
Factory Outlet Centre	2000			2000

5.9 The highest cumulative level of floorspace submitted across the four major cities was for retail warehouse units (21,000 sq. m). The highest cumulative level approved was for convenience superstores (22,000 sq. m).

6. Construction Type

6.1 Table 9 outlines the type of construction activity granted planning consent in each local authority. It shows approximately 75% of all approved development involved new build. Most of the conversion/ refurbishment was in Aberdeenshire ((5,000 sq. m) whilst most of the extension floorspace took place in North Lanarkshire (23,000 sq. m).

Table 9: Approves Construction Activity Across Local Authorities (Floorspace – sq. m)

	Alteration/Conversion and Refurbishment		**Extension**		**New Build**	
Local Authority	No.	Floorspace	No.	Floorspace	No.	Floorspace
Aberdeen City						
Aberdeenshire	2	5000			1	4000
Angus	1	3000			1	2000
Argyll and Bute						
Clackmannanshire						
Dumfries and Galloway			1	2000	1	2000
Dundee City			1	6000		
East Ayrshire						
East Dunbartonshire						
East Lothian						
East Renfrewshire						
Edinburgh, City of			2	3000	3	18000
Eilean Siar						
Falkirk					1	8000
Fife						
Glasgow City	1	3000	2	5000	9	65000
Highland					2	7000
Inverclyde						
Midlothian					1	5000
Moray						
North Ayrshire						
North Lanarkshire			1	23000	2	12000
Orkney Islands						
Perthshire and Kinross					1	3000
Renfrewshire					3	16000
Scottish Borders						
Shetland Islands						
South Ayrshire			1	2000		
South Lanarkshire			1	2000	2	23000
Stirling					1	2000
West Dunbartonshire					2	3000
West Lothian			3	5000		
Scotland	**4**	**11000**	**12**	**48000**	**30**	**170000**

6.2 Table 10 apportions the type of construction activity ganted planning consent to structure plan areas.

Table 10: Approved Construction Activity Across Structure Plan Areas (Floorspace – sq. m)

	Alteration/Conversion and Refurbishment		Extension		New Build	
Structure Plan Area	No.	Floorspace	No.	Floorspace	No.	Floorspace
Aberdeen/Aberdeenshire	2	5000			1	4500
Argyll and Bute						
Ayrshire			1	2000		
Dumfries and Galloway			1	2000	1	1600
Dundee and Angus	1	3000	1	6000	1	1600
Eilean Siar						
Falkirk					1	7600
Fife						
Glasgow and Clyde Valley	1	3000	4	29000	18	119000
Highland					2	7000
Lothian			5	8000	4	23000
Moray						
Orkney						
Perthshire and Kinross					1	2700
Scottish Borders						
Shetland						
Stirling and Clackmannan					1	2000
Scotland	**4**	**11000**	**12**	**47000**	**30**	**169000**

6.3 The table shows that the Glasgow and Clyde Valley Structure Plan area had three times the level of approved floorspace for conversion/refurbishment and extensions than Lothian, and over five times the level of new build than Lothian.

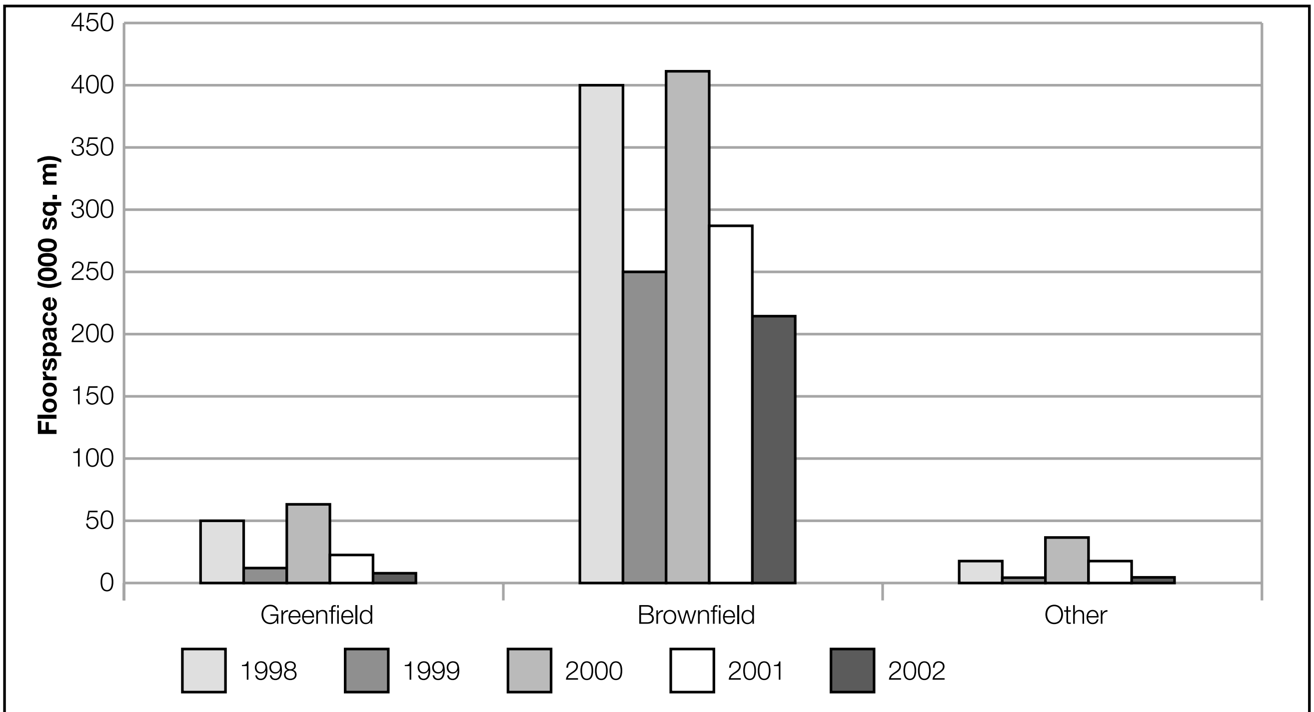
7. Location of Development

7.1 Table 11 shows the prominence of brownfield over greenfield in terms of number of entries at each stage and the amount of floorspace proposed. Figure 4 compares the brownfield/greenfield approvals over the 5 years of this survey.

Table 11: Greenfield/Brownfield Development by Planning Stage

		Application Submitted	Approved	Refused – No Appeal	Refused – Potential Appeal / Inquiry	Withdrawn	Under Construction	Commenced Trading	Other
Number of Entries	Greenfield	10	2	1	1	1			8
	Brownfield	74	42	5	3	12	16	19	49
	Other	9	2	1	1		8	7	7
	Scotland	93	46	7	5	13	24	26	64
% of Total Entries	Greenfield	11%	4%	14%	20%	8%	0%	0%	13%
	Brownfield	80%	91%	71%	60%	92%	67%	73%	77%
	Other	10%	4%	14%	20%	0%	33%	27%	11%
Floorspace (sq. m gross)	Greenfield	60000	6000	2000	5000	4000			50000
	Brownfield	403000	214000	20000	18000	52000	103000	78000	381000
	Other	29000	6000	5000	5000		41000	33000	39000
	Scotland	492000	226000	27000	28000	56000	144000	111000	471000

Figure 4: Greenfield/Brownfield Approvals



7.2 Table 12 sets out the local plan allocation (where known) for the number of proposals at each planning stage. Allocations for adopted local plans and draft local plans (where relevant) are included.

Table 12: Retail Development by Local Plan Policy Allocation

	Application Submitted		Approved		Refused – No Appeal		Refused – Potential Appeal / Inquiry		Withdrawn		Under Construction		Commenced Trading		Other	
	adopted	draft	adopted	draft	adopted	draft	adopted	draft	adopted	draft	adopted	draft	adopted	draft	adopted	draft
Retail	31	38	18	28	1	2	2	2	6	3	9	7	9	14	15	17
Industry	21	10	9	1	2	2	1	1	2	2	5	2	7	1	22	8
Housing	4	7	2	3	1				3		1	1	2	2	6	5
Mixed	8	1	3	4		1			1		3	1	2		4	2
Countryside/ Greenbelt	7		1		1		2	2							7	4
Sport/ Recreation	1	1	1				1	1			1		2	1	2	2
Opportunity Sites	9	6	2	1						1	1		3		5	7
Offices	1	1									4		3		1	1
Open Space	1	1	1												4	1
Other	17	16	9	9	2	1		2	1	2	2		3	2	7	6
Total	**100**	**81**	**46**	**46**	**7**	**6**	**6**	**8**	**13**	**8**	**26**	**11**	**31**	**20**	**73**	**53**

7.3 The largest number of retail applications submitted, approved, under construction and newly trading were for sites allocated for retail uses and, as in 2001, in general areas allocated for industry followed this. Sites designated as ‘other’ were less than the high levels shown in 2001.

8. Sequential Approach

8.1 One of the key policy guidelines contained within NPPG8 (Revised 1998) is the requirement for planning authorities to adopt a sequential approach to selecting sites for new retail, commercial leisure developments and other key town centre uses. Town centre sites are identified as the preferred location choice, followed by, edge of centre and out of centre sites.

8.2 Table 13 sets out the level of planning applications, approvals, refusals etc. on the basis of the sequential approach across Scotland.

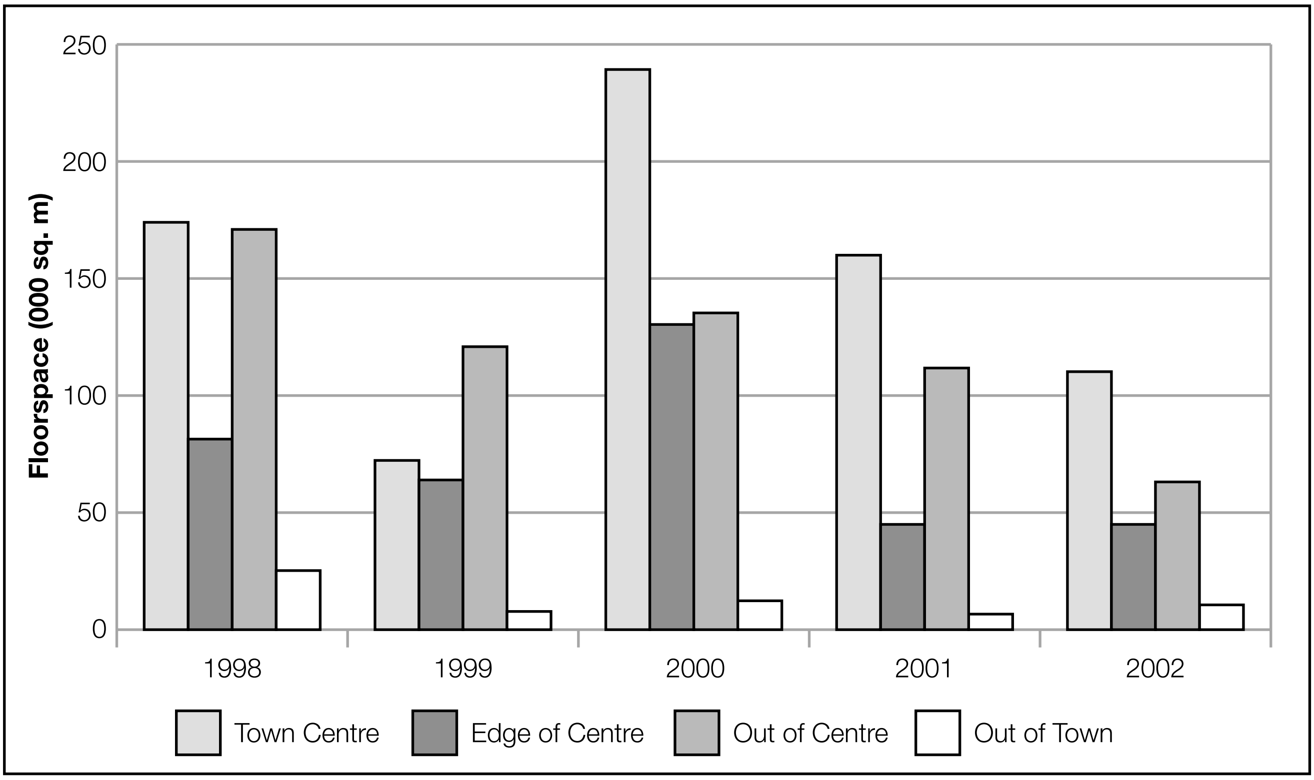
Table 13: Sequential Location by Key Planning Stage

		No. of Entries	Application Submitted	Approved	Refused – No Appeal	Refused – Potential Appeal/Inquiry	Withdrawn	Under Construction	Commenced Trading	Other
Number of Entries	Town Centre	47	21	14			1	9	10	7
	Edge of Centre	41	19	13	2	2		4	8	17
	Out of Centre	106	47	17	4	1	12	10	8	31
	Out of Town	10	5	2	1	2		1	1	6
	Not Known	5	1							3
	Scotland	**209**	**93**	**46**	**7**	**5**	**13**	**24**	**27**	**64**
% of Total Entries	Town Centre	22%	23%	30%	0%	0%	8%	38%	37%	11%
	Edge of Centre	20%	20%	28%	29%	40%	0%	17%	30%	27%
	Out of Centre	51%	51%	37%	57%	20%	92%	42%	30%	48%
	Out of Town	5%	5%	4%	14%	40%	0%	4%	4%	9%
	Not Known	2%	1%	0%	0%	0%	0%	0%	0%	5%
Floor-space (sq. m gross)	Town Centre	441000	129000	110000			7000	63000	44000	186000
	Edge of Centre	186000	76000	46000	6000	14000		17000	32000	81000
	Out of Centre	548000	230000	63000	16000	4000	49000	61000	36000	162000
	Out of Town	74000	56000	7000	5000	10000		3000	3000	36000
	Not Known	10000	1000							6000
	Scotland	**1259000**	**492000**	**226000**	**27000**	**28000**	**56000**	**144000**	**115000**	**471000**
% of Total Floor-space	Town Centre	35%	26%	49%	0%	0%	13%	44%	38%	39%
	Edge of Centre	15%	15%	20%	22%	50%	0%	12%	28%	17%
	Out of Centre	44%	47%	28%	59%	14%	88%	42%	31%	34%
	Out of Town	6%	11%	3%	19%	36%	0%	2%	3%	8%
	Not Known	1%	0%	0%	0%	0%	0%	0%	0%	1%

8.3 The table indicates that more floorspace was approved in town centre and edge of centre combined (156,000 sq. m) than in out of centre and out of town combined (70,000 sq. m). The percentage of town centre sites receiving approval was less than in 2001 but still remains at 30%.

8.4 Figure 5 compares the sequential location of approved floorspace with 1998, 1999, 2000 and 2001 returns.

Figure 5: Sequential Location of Approved Floorspace



8.5 Table 14 shows the sequential location of approved planning consents in each local authority area. Table 15 sets out the same information for Structure Plans.

Table 14: Sequential Approach – Approved Planning Applications by Local Authority (Floorspace – sq. m)

	Town Centre		Edge of Centre		Out of Centre		Out of Town	
Local Authority Area	No.	sq. m	No.	sq. m	No.	sq. m	No.	sq. m
Aberdeen City								
Aberdeenshire	3	9000						
Angus	2	4000						
Argyll and Bute								
Clackmannanshire								
Dumfries and Galloway			2	4000				
Dundee City					1	6000		
East Ayrshire								
East Dunbartonshire								
East Lothian								
East Renfrewshire								
Edinburgh, City of	1	4000	2	3000	2	14000		
Eilean Siar								
Falkirk			1	8000				
Fife								
Glasgow City	3	43000	6	24000	3	7000		
Highland			1	6000	1	1000		
Inverclyde								
Midlothian							1	5000
Moray								
North Ayrshire								
North Lanarkshire	1	23000			2	12000		
Orkney Islands								
Perthshire and Kinross							1	3000
Renfrewshire	1	5000			2	11000		
Scottish Borders								
Shetland Islands								
South Ayrshire					1	2000		
South Lanarkshire	1	19000			2	5000		
Stirling					1	2000		
West Dunbartonshire			1	2000	1	1000		
West Lothian	2	3000			1	2000		
Scotland	**14**	**110000**	**13**	**47000**	**17**	**63000**	**2**	**8000**

Table 15: Sequential Approach – Approved Planning Applications by Structure Plan Area (Floorspace – sq. m)

	Town Centre		Edge of Centre		Out of Centre		Out of Town	
Structure Plan Area	No.	sq. m	No.	sq. m	No.	sq. m	No.	sq. m
Aberdeen/Aberdeenshire	3	9000						
Argyll and Bute								
Ayrshire					1	2000		
Dumfries and Galloway			2	4000				
Dundee and Angus	2	4000			1	6000		
Eilean Siar								
Falkirk			1	8000				
Fife								
Glasgow and Clyde Valley	6	89000	7	26000	10	36000		
Highland			1	6000	1	1000		
Lothian	3	7000	2	3000	3	16000	1	5000
Moray								
Orkney								
Perthshire and Kinross							1	3000
Scottish Borders								
Shetland								
Stirling and Clackmannan					1	2000		
Scotland	**14**	**109000**	**13**	**47000**	**17**	**63000**	**2**	**8000**

8.5 Tables 16 and 17 provide a detailed breakdown of greenfield/brownfield development by planning stage and the four locations defined by the sequential approach. They highlight the continued prominence of brownfield sites at most planning stages and sequential locations.

Table 16: Greenfield/Brownfield Development by Sequential Location and Planning Stage (No.)

	Town Centre			**Edge of Centre**			**Out of Centre**			**Out of Town**		
	Green	Brown	Other	Green	Brown	Other	Green	Brown	Other	Green	Brown	Other
Submitted		19	2		16	3	8	36	3	2	2	1
Approved		14			12	1	2	15			1	1
Refused – No Appeal					2		1	3				1
Refused – Potential Appeal					2			1		1		1
Under Construction		3	6		4			8	2		1	

Table 17: Greenfield/Brownfield Development by Sequential Location and Planning Stage (Floorspace – sq. m)

	Town Centre			**Edge of Centre**			**Out of Centre**			**Out of Town**		
	Green	Brown	Other	Green	Brown	Other	Green	Brown	Other	Green	Brown	Other
Submitted		122000	7000		63000	12000	35000	190000	5000	25000	27000	5000
Approved		110000			45000	1000	6000	57000			3000	5000
Refused												–
No Appeal					6000		2000	15000				5000
Refused												–
Potential Appeal					14000			4000		5000		5000
Under Construction		29000	34000		17000			55000	6000		3000	

8.6 Tables 18 and 19 set out the varying frequency and size of different retail formats across each planning stage and sequential location.

8.7 The tables show that ‘mixed retail development’ was most common in town centre locations (13). Convenience was again the most frequently recorded type within edge of centre areas (13), and was also the dominant type of retailing recorded in out of centre locations (20).

Table 18: Retail Format by Sequential Location and Planning Stage (No.)

	Town Centre				Edge of Centre				Out of Centre				Out of Town			
	Convenience	Comparison	Mixed	Other	Convenience	Comparison	Mixed	Other	Convenience	Comparison	Mixed	Other	Convenience	Comparison	Mixed	Other
Submitted	3	4	13	1	13	4	2		20	19	6	2		3	1	1
Approved	2	4	8		7	3	3		8	6	3			1		1
Refused – No Appeal					1	1			3	1				1		
Refused – Potential Appeal					1	1			1					2		
Under Construction	3		6		1	2	1		3	6		1				1

Table 19: Retail Format by Sequential Location and Planning Stage (Floorspace – sq. m)

	Town Centre				Edge of Centre				Out of Centre				Out of Town			
	Convenience	Comparison	Mixed	Other	Convenience	Comparison	Mixed	Other	Convenience	Comparison	Mixed	Other	Convenience	Comparison	Mixed	Other
Submitted	7000	8000	113000	1000	47000	18000	11000		79000	104000	35000	11000		29000	21000	6000
Approved	9000	11000	90000		27000	7000	13000		27000	22000	13000			5000		3000
Refused – No Appeal					3000	3000			15000	1000				5000		
Refused – Potential Appeal					4000	10000			4000					10000		
Under Construction	10000		53000		2000	13000	2000		10000	49000		2000				3000

9. Largest Developments by Planning Stage

9.1 Table 20 below, sets out the 10 largest retail schemes at each of the planning stages identified in the report.

The key trends from the table may be summarised as follows:

- **Largest applications:** Whilst a variety in locations is shown all were new build. Eight were mixed development and nine were on brownfield sites.

- **Largest approved schemes:** Six were in the Glasgow and Clyde Valley Structure Plan area and nine were new build. All were on brownfield sites and seven were either in town centre or edge of centre locations.

- **Largest refused consent without the prospect of further appeal:** Six of the seven in this category were new build and each were in a variety of locations. Five were brownfield sites and all were either convenience or comparison formats.

- **Largest refused consent but with the possibility of appeal/inquiry/call-in:** Four out of the total of five of these were new build and all were either convenience or comparison formats. There was a mix of locations and whether the proposal was on brownfield or greenfield sites.

- **Largest developments under construction:** Nine were new build and five were in town centres. There was a variety on location and in format.

- **Largest schemes newly trading:** Eight of these developments were new build and seven were in town or edge of centre locations. Eight were on brownfield sites but there was a mixture of formats.

- **Largest withdrawn schemes:** Nine applications were out of centre and all were either convenience or comparison formats. Eight were new build.

Table 20: Largest Retail Developments by Planning Stage

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								
22000	Mercat Extension, The Esplanade, Kirkcaldy	Fife	Fife	New Build	Mixed – Shopping Centre/Mall	Yes	20	Brownfield	Town Centre
20900	Perth Agricultural Centre, Crieff Road	Perthshire & Kinross	Perthshire & Kinross	New Build	Mixed – Retail Park	Yes	9	Brownfield	Out of Town
19045	East Kilbride, Town Centre expansion	South Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre/Mall	No	0	Brownfield	Town Centre
19000	Plaza Town Centre Rothesay	South Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre/Mall	Yes	30	Brownfield	Town Centre
18790	Cumbernauld Town Centre	North Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre/Mall	Yes	0	Brownfield	Town Centre
14970	Milton Link	Edinburgh	Lothian	New Build	Comparison – Retail Warehouse Park	No	11	Greenfield	Out of Town
13800	Land at Kyle, Smith & Mill Street, Ayr	South Ayrshire	Ayrshire	New Build	Mixed – Shopping Centre/Mall	Yes	19	Brownfield	Town Centre
12500	Hospitals, Berryden Road	Aberdeen	Aberdeen/ Aberdeenshire	New Build	Mixed – Retail Park	No	0	Brownfield	Out of Centre
11517	Tesco, Renfrew Road, Paisley	Renfrewshire	Glasgow & Clyde Valley	New Build	Convenience – Superstore	No	1	Brownfield	Out of Centre
10700	King St Bus Depot	Aberdeen	Aberdeen/ Aberdeenshire	New Build	Mixed – Retail Park	No	5	Brownfield	Out of Centre

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								
27850	Auchinlea Park (Glasgow Fort)	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – other	Yes	NK	Brownfield	Town Centre
22836	Motherwell Town Centre	North Lanarkshire	Glasgow & Clyde Valley	Extension	Mixed – Shopping Centre/Mall	Yes	50+	Brownfield	Town Centre
19000	Plaza Town Centre Rothesay	South Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre/Mall	Yes	30	Brownfield	Town Centre
12000	Candleriggs, Trongate, Wilson Street	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – District/ Town/City Centre infill	Yes	NK	Brownfield	Town Centre
9300	Auchinlea Park (Glasgow Fort)	Glasgow	Glasgow & Clyde Valley	New Build	Mixed – other	Yes	NK	Brownfield	Edge of Centre
9291	B&Q Coatbank Street Coatbridge	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of Centre
8361	New Mart Road Chesser (ASDA)	Edinburgh	Lothian	New Build	Convenience – Superstore	No	1	Brownfield	Out of Centre
7600	Brockville, Falkirk	Falkirk	Falkirk	New Build	Convenience – Superstore	No	1	Brownfield	Edge of Centre
6247	Redevelopment to supermarket, Dingwall	Highland	Highland	New Build	Convenience – Superstore	No	1	Brownfield	Edge of Centre
6000	Forth Ports, Newhaven Harbour	Edinburgh	Lothian	New Build	Mixed – Local/ Neighbourhood	Yes	NK	Brownfield	Out of Centre

Floor Area sq. m	Description	Local Authority	Structure Plan Area	Construction Type	Retail Format Centre	Mixed Use	No. of Units	Brown/ Greenfield	Sequential Location
	7 Largest Schemes Refused – No Appeal								
7450	250 Alexandra Parade	Glasgow	Glasgow & Clyde Valley	New Build	Convenience – Superstore	No	1	Brownfield	Out of Centre
6100	North Anderson Drive Fire Station	Aberdeen	Aberdeen/ Aberdeenshire	New Build	Convenience – Superstore	No	1	Brownfield	Out of Centre
5111	Straiton Farm, Loanhead	Midlothian	Lothian	New Build	Comparison – Retail Warehouse Unit(s)	No	4	Other	Out of Town
2948	CO-OP	Dumfries & Galloway	Dumfries & Galloway	New Build	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Edge of Centre
2700	170 High Street	Glasgow	Glasgow & Clyde Valley	New Build	Other Convenience	Yes	1	Brownfield	Edge of Centre
1800	C&A Models, Borrowmeadow Road	Stirling	Stirling & Clackmannan	New Build	Convenience – Discount Supermarket	No	3	Greenfield	Out of Centre
1143	Renfrew Retail Park, Renfrew	Renfrewshire	Glasgow & Clyde Valley	Extension	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of Centre
	5 Largest Refused – Potential Appeal or Inquiry								
10000	Mavor Avenue, East Kilbride	South Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit(s)	Yes	1	Brownfield	Edge of Centre
5111	Straiton Farm, Loanhead	Midlothian	Lothian	New Build	Comparison – Retail Warehouse Unit(s)	No	4	Other	Out of Town
5000	Brodies Countryfare, Drumoak	Aberdeenshire	Aberdeen/ Aberdeenshire	New Build	Other Comparison	#N/A	1	Greenfield	Out of Town
4222	Existing B&Q Warehouse, Dundee	Dundee	Dundee & Angus	Alteration/ Conv	Convenience – Superstore	No	1	Brownfield	Out of Centre
100	Duke's Road, Troon	South Ayrshire	Ayrshire	New Build	Convenience – Superstore	No	1	Brownfield	Edge of Centre

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								
19100	Links Road	Aberdeen	Aberdeen/ Aberdeenshire	New Build	Comparison – Retail Warehouse Park	No	13	Brownfield	Out of centre
19000	Plaza Town Centre Rothesay	South Lanarkshire	Glasgow & Clyde Valley	New Build	Mixed – Shopping Centre/Mall	Yes	30	Brownfield	Town Centre
12569	Newkirkgate, Leith	Edinburgh	Lothian	Refurb/Repair	Mixed – Shopping Centre/Mall	No	35	Other	Town Centre
12400	East Dock Street, Dundee	Dundee	Dundee & Angus	New Build	Comparison – Retail Warehouse Park	No	10	Brownfield	Edge of Centre
12100	Brown & Tawse, Kingsway West	Dundee	Dundee & Angus	New Build	Comparison – Retail Warehouse Park	No	13	Brownfield	Out of Centre
9291	B&Q Coatbank Street Coatbridge Lanarkshire	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of Centre
8920	Harvey Nicols – store only (St Andrew Square)	Edinburgh	Lothian	New Build	Mixed – District/ Town/City Centre infill	Yes	1	Other	Town Centre
7025	The Walk (St Andrew Square)	Edinburgh	Lothian	New Build	Mixed – District/ Town/City Centre infill	Yes	23	Other	Town Centre
6400	Tesco, Blackfriars Road, Elgin	Moray	Moray	New Build	Convenience – Superstore	No	1	Brownfield	Town Centre
5300	Edinburgh Road Tesco	Perthshire and	Perthshire & Kinross Kinross	New Build	Convenience – Superstore	No	1	Brownfield	Out of Centre

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								
12569	Newkirkgate, Leith	Edinburgh	Lothian	Refurb/Repair	Mixed – Shopping Centre/Mall	No	35	Other	Town Centre
10200	Forge Retail Park, Parkhead	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Park	No	1	Brownfield	Edge of Centre
9291	B & Q Coatbank Street Coatbridge Lanarkshire	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of Centre
8920	Harvey Nicols – store only (St Andrew Square)	Edinburgh	Lothian	New Build	Mixed – District/ Town/City Centre infill	Yes	1	Other	Town Centre
7898	Peel Centre (Sainsbury)	Dumfries and Galloway	Dumfries & Galloway	New Build	Comparison – Retail Warehouse Park	No	7	Brownfield	Out of Centre
7897	Town Park, South Circular Road, Coatbridge	North Lanarkshire	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Edge of Centre
5383	Tesco, Auld Brig Road, Alloa	Clackmannan	Stirling & Clackmannan	New Build	Convenience – Superstore	No	1	Brownfield	Town Centre
5300	Edinburgh Road Tesco	Perthshire and Kinross	Perthshire & Kinross	New Build	Convenience – Superstore	No	1	Brownfield	Out of Centre
4100	Duke's Road, Troon	South Ayrshire	Ayrshire	New Build	Convenience – Superstore	No	1	Brownfield	Edge of Centre
3700	Thistle Centre Extension, Stirling	Stirling	Stirling and Clackmannan	Extension	Mixed – Shopping Centre/Mall	Yes	3	Brownfield	Town Centre

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								
10500	Edmiston Drive, Helen Street	Glasgow	Glasgow & Clyde Valley	New Build	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of centre
7300	Former Dansco Dairy, Nivensknowe, Loanhead	Midlothian	Lothian	New Build	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of Centre
7000	Middleton Park	Aberdeen	Aberdeen/ Aberdeenshire	New Build	Convenience – Superstore	No	1	Brownfield	Town Centre
6000	Forth Ports, Newhaven Harbour	Edinburgh	Lothian	New Build	Convenience – Superstore	Yes	1	Brownfield	Out of Centre
4222	Existing B&Q Warehouse, South Road, Dundee	Dundee	Dundee & Angus	Alteration/ Conv	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of Centre
4222	Existing B&Q Warehouse, South Road, Dundee	Dundee	Dundee & Angus	Alteration/ Conv	Comparison – Retail Warehouse Unit(s)	No	1	Brownfield	Out of Centre
4200	Millburn Street	Aberdeen	Aberdeen/ Aberdeenshire	New Build	Other Comparison	No	7	Brownfield	Out of Centre
4180	Westway, Arbroath	Angus	Dundee & Angus	New Build	Convenience – Superstore	No	1	Greenfield	Out of Centre
2800	Land at Edinburgh Road	Perthshire and Kinross	Perthshire & Kinross	New Build	Comparison – Retail Warehouse Park	No	2	Brownfield	Out of Centre
2600	Portland Street	Aberdeen	Aberdeen/ Aberdeenshire	New Build	Other Comparison	No	2	Brownfield	Out of Centre

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