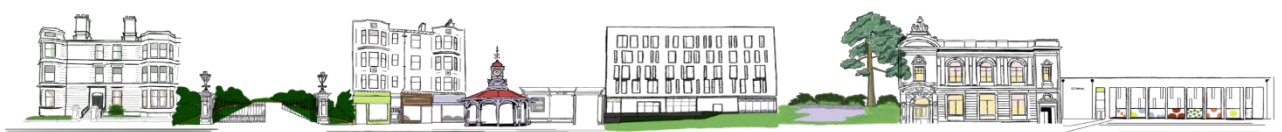




Glasgow City Council
City Development Plan 2
Background Report
Business and Industry Land Audit
March 2024



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1 Executive Summary

1.1 Purpose of Paper

- 1.1.1 The National Planning Framework 4 was approved in February 2023. It requires Local Development Plans to allocate sufficient land for business and industry, taking into account business and industry land audits.
- 1.1.2 It reports that Local Development Plans should ensure that there is a suitable range of sites that meet current market demand, location, size, and quality in terms of accessibility and services and that allocations 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.
- 1.1.3 This report sets out Glasgow's business story, outlines the scale of the existing industrial and business land supply in Glasgow, and indicates the sectoral supply, demand and policy headlines at 2024. Within this context, it reports a summary of the performance of the Economic Development Areas (EDA) to inform the development of a future land supply strategy for the next Local Development Plan.
- 1.1.4 It revealed that many of the city's industrial and business areas are characterised by:
- A lack of available land at all scales but particularly above 4 hectares (~10 acres)
 - Most locations characterised by aging or old buildings that will need adapted or replaced to deliver a low carbon and net zero economic recovery; and
 - External maintenance issues with roads, pavements and older buildings.

1.2 Summary of Key Issues

Land Supply Issues

- 1.2.1 *Amount:* There was 92.76 hectares of available land in Glasgow across 60 sites at 31 March 2023. This is less than in the past and has been reducing since City Development Plan adoption in March 2017. If the reduction in the industrial land supply continues at the rate that it has over the past 10 years, without additional sites being identified, either in new locations, or via the re-development of existing buildings and plots, then it would become depleted during the next Development Plan period.
- 1.2.2 *Scale:* Most of the land supply comprised sites of under 1 hectare (57%), a further 38% were sites of 1 to 4 hectares and there were only three sites of over 4 hectares (~10 acres) in the supply, two of which have permission for alternative uses.
- 1.2.3 *Distribution:* The land supply is not distributed evenly across the city. Eight of the 23 wards have no recognised land available for business and industry uses. Of the wards south of the river (1 to 8) only ward 5 Govan had more than 4 hectares of land supply, likewise only ward 16 Canal, in the north and west of the city (wards 10-16 and 23) had more than 4 hectares of land. The east of the city (ward 9 and wards 17 to 22) had four wards with more than 4 hectares of land available.
- 1.2.4 *Take-Up for industry and business use:* Over the past decade 65.05 hectares of land has been taken up for business or industry purposes creating 572,506 square metres of new floorspace. This is a significant scale of land but is a relative reduction compared with the decade before (112.95ha/790,535sqm). While this may reflect the poorer economic conditions over the past decade, it could also be a symptom of the smaller supply of land identified for new industrial and business uses in the City Development Plan. Recent spikes in demand for large-scale storage and distribution uses have had the largest impact on reducing the supply in recent years.

- 1.2.5 *The contribution of greenfield sites:* The success of the West of Scotland Science Park (WOSSP), as an example of the benefits of developing a greenfield location, are now well established and while not the major component of land take-up, greenfield locations have nevertheless continued to play a role in attracting and growing the business base across Glasgow. There is now very little greenfield marketable supply available (<10 hectares).
- 1.2.6 *Take-up for non-industrial or business uses:* Around 40% of the land removed from the supply over the past decade has been for non-industrial uses, including for example, the development of Darnley Mains for housing.

Demand and Delivery Issues

- 1.2.7 *Demand for Grade A office space:* Demand in the market is for best-in-class office space, and demand is outweighing current supply. A continued, and significant scale, demand for the development, and subsequent letting of, Grade A office space in the City Centre has been reported. At 2023, market reports indicated that there was no Grade A office space available or in the pipeline and no land reserved as such in the supply.
- 1.2.8 *Demand for new, improved and more industrial buildings:* Bespoke analysis by Invest Glasgow identifies low availability of industrial buildings in the city generally, and very low availability of units over 25,000 square feet. It identifies that despite this market there has been a lack of speculative building, programmed or underway, to increase stock and provide choice and flexibility in the prospective occupiers.
- 1.2.9 *Demand for Specialist Buildings:* The current stock of laboratory facilities in the city is at capacity. New and additional lab space will be required to accommodate anticipated spinouts from the Universities and expansions of existing smaller companies.
- 1.2.10 *The Success of the Urban Regeneration Company (URC) model:* Clyde Gateway Urban Regeneration Company has played a key role in unlocking, marketing and delivering sites in the east end and its uncertain future status is a concern for that area rolling forward. The emergence of Clyde Mission and the Innovation Districts would potentially benefit from the co-ordination of URCs.

Policy and Monitoring Issues

- 1.2.11 *The Grand Challenges and sectoral growth:* Future policy interventions at a local level should demonstrate how they positively contribute to one or all of the Council's Grand Challenges of increased productivity, contribution to climate change and adherence to inclusive growth. Consideration of the land requirements of the 6 sectoral clusters ([Health-tech](#), [Fintech](#), [Green Economy](#), [Digital and creative economy](#), [Advanced manufacturing](#) and the [Space industry](#)) as identified in the Investment Strategy, would also be beneficial.
- 1.2.12 *The emergence of the Wellbeing Economy:* Future policy interventions at a local level would benefit from reference to the Wellbeing Economy Monitoring indicators as a measure of success in order to align with national goals.
- 1.2.13 *A new Development Plan approach to regionally important sites:* A challenge for the next Development Plan will be in identifying new regionally important opportunities representative of the role Strategic Economic Investment Locations (SEILs) previously played. The Innovation Districts, Investment Zone and Clyde Mission may play a role in identifying new geographies, while support for repurposing or expansion/amendment of existing SEIL boundaries may present a positive narrative for these locations and allow them to continue to contribute to the economic growth of the City.
- 1.2.14 *A new Development Plan approach to sectoral support:* A further challenge for the next Development Plan will be in setting out support for growth sectors and providing a framework that allows them to flourish. It is not clear what meaningful impact the Areas of City-Wide Economic Importance (ACWEI) designation has had on either existing businesses or in encouraging prospective growth sectors to cluster. The performance of the large industrial areas has been notably more positive than the outcomes for the single user sites in terms of new development.

1.3 Evidence Report Requirements

- 1.3.1 The Planning (Scotland) Act 2019 requires planning authorities to take into account the economic characteristics of the district and the principal purposes for which the land is used.
- 1.3.2 The Scottish Government's [Local Development Planning Guidance](#) (May 2023) states that Evidence Reports should include/consider:
- a. Regional strategies including City Region Deals, Regional Growth Deals and Regional Economic Strategies.
 - b. Local economic strategies.
 - c. Business and Industry Land Audits.
- 1.3.3 The Evidence Report may refer to analysis of employment need, local poverty, disadvantage and inequality, to identify where future business and industry development may provide most benefit.
- 1.3.4 The Guidance also states that identifying the principle economic characteristics of the area is likely to require use of the up-to-date market intelligence and demand forecasting that also informs local economic strategies.
- 1.3.5 Ultimately it identifies that future Proposed Plans could include sites identified in Enterprise Areas, business parks, science parks, large and medium sized industrial sites and high amenity sites.
- 1.3.6 This paper seeks to address these requirements to inform the re-assessment of the performance of the existing Economic Development Areas in the City Development Plan.

2 Economic Characteristics of the District

2.1 The Glasgow Narrative

- 2.1.1 Glasgow is Scotland's metropolis¹. A port of culture, ideas and inventions. A city shaped by its **proud heritage in science², engineering³ and design⁴**. It is the **engine of the country's economy⁵** and accounts for a third of all Scottish jobs⁶.
- 2.1.2 It is **ambitious⁷, innovative⁸ and entrepreneurial⁹** - a city internationally recognised for its openness, **resilience¹⁰**, trust and **friendliness¹¹**. It is in the top three of the UK's **most attractive technology locations¹²** and a natural focus for the knowledge economy¹³.
- 2.1.3 Glasgow is **globally recognised for** the strength and depth of its sector base in **health technology¹⁴, digital¹⁵, financial and business services¹⁶, software and IT¹⁷, energy transition¹⁸ and decarbonisation of transport¹⁹, food and drink innovation²⁰ and space²¹**. All of which make it a global destination for leading-edge businesses operating in those spheres.

¹ GCC/Invest Glasgow (2022) [The Glasgow Narrative: Our Business Story](#)

² University of Glasgow (November 2022) [University of Glasgow Innovation Strategy 2022 to 2025](#)

³ BAE Systems (October 2023) [Construction of new state of the art shipbuilding facility underway in Glasgow](#)

⁴ Glasgow Urban Lab (October 2022) [Place Commission\Glasgow: People Make Places](#)

⁵ Ourscottishfuture.org (February 2023) [Britain's Northern Superpower: Glasgow's Economy in Context](#); GCC/Invest Glasgow (accessed March 2024) [Why Glasgow? Economy](#)

⁶ CBRE (June 2023) [Which City? Which Sector?](#)

⁷ Glasgow City Council (March 2022) [Glasgow Economic Strategy 2022 to 2030 \(new version\)](#);

⁸ GCC/Invest Glasgow (accessed March 2024) [Why Glasgow? Innovation and R&D](#)

⁹ Startups (Dec2022) [Top 25 UK cities to start a business in 2022](#)

¹⁰ GCC (June 2023) [Investment Zone to support just transition and climate-resilient economic development](#)

¹¹ Time Out (June 2022) [Glasgow has been named the world's friendliest city](#)

¹² CBRE (March 2022) [UK Tech Cities Report 2022](#)

¹³ Glasgow Urban Lab et al (May 2022) [Scotland's Urban AGE 2022: Shocks to the System](#); Glasgow Urban Lab et al (September 2018) [Scotland's Urban Age: Aberdeen, Glasgow and Edinburgh in the Century of the City](#)

¹⁴ Ourscottishfuture.org (February 2023) [Precision Medicine and Scotland's Opportunity](#)

¹⁵ GCC/Invest Glasgow (accessed March 2024) [Clusters Digital Creative Industries](#)

¹⁶ Skills Development Scotland (October 2021) [Barclays opens major financial tech hub in Glasgow](#)

¹⁷ Skills Development Scotland (February 2021) [Glasgow is one of UK's biggest tech investment hubs](#)

¹⁸ Skills Development Scotland (August 2021) [Star Renewable Energy delivers district heat to Scottish cities](#)

¹⁹ SPT (November 2023) [Progressing Clyde Metro plans](#)

²⁰ Edrington (June 2023) [Annual Report and Financial Statements](#)

²¹ GCC/Invest Glasgow (2024) [Space and Satellite Technology](#)

- 2.1.4 As well as being the **nation's cultural powerhouse**, Glasgow is also globally recognised for its **ability to host²² mega and major music²³, sporting²⁴ and conference events²⁵**. Its location at the heart of an extensive air, rail and road network also ensures its connectivity and position as Gateway to Scotland.
- 2.1.5 The city's destination brand - **People Make Glasgow²⁶** - encapsulates the city's personality and 'can do' attitude. It is an experience that encourages many students to remain in the city after graduation²⁷ and start enterprises in the supportive tech and creative industries ecosystems, or to build careers with the numerous corporate and small and medium enterprises that value the city's rich pipeline of skilled, creative and loyal talent. It also drives confidence in international investment, ranking first for large cities in 2024 ²⁸.
- 2.1.6 As with all major cities, there are challenges to be faced. Inequality²⁹, health outcomes³⁰, child poverty³¹, and air quality³² are all long-standing and interlinked concerns. The [Glasgow Economic Strategy](#) identifies three Grand Challenges: to increase productivity, recognising that a more productive Glasgow is a more equal one; to address climate change, recognising that everyone will benefit from a more resilient economy; and inclusive growth, recognising that the benefits of developing our economy must be shared with all of our citizens, across all of our communities. Interventions like the [Understanding Glasgow: The Glasgow Indicators Project](#), the [Low Emission Zone](#) and the [Glasgow Living Wage](#) are examples of steps towards addressing these issues.

²² GCC/Invest Glasgow (2020) [Hotel Prospectus](#)

²³ GCC/Invest Glasgow (Feb 2023) [Hydro and Armadillo Among Best in Europe](#), Glasgow World (March 2024) [Glasgow's Barrowland Ballroom recognised as one of the best 'club venues' in Europe](#)

²⁴ City Live (Feb 2024) [Big weekend For Glasgow as it hosts another major sporting event](#)

²⁵ Glasgow Conference Bureau (June 2023) [Confidence Grows in Glasgow Conference Market](#); International Conference Alerts (March 2024) [Conference Calander](#)

²⁶ GlasgowLife/People Make Glasgow (accessed March 2024) [Neighbourhoods](#)

²⁷ WhatUni? (2019) [Graduate Retention: Best UK Cities at Keeping Students After Graduation](#); CentreforCities (Feb 2019) [What lies behind Glasgow's graduate retention success story?](#)

²⁸ FDI (Feb 2024) [European Cities and Regions of the Future 2024 — The winners](#)

²⁹ Economics Observatory (Feb 2022) [Levelling up: what might it mean for Scotland?](#)

³⁰ Centre for Population Health (Aug 2021) [Health in a changing city: Glasgow 2021](#)

³¹ Understanding Glasgow: The Glasgow Indicators Project (accessed March 2024) [Overview Child Poverty](#)

³² Fraser of Allander (March 2024) [What do we know about the relationship between air pollution, health, and inequality in Glasgow?](#)

[The Growth City](#)

- 2.1.7 Home to Scotland's largest office market, Glasgow is also recognised as one of the most affordable cities in the UK and beats London, Manchester, Birmingham and Edinburgh on property and labour costs, yet delivers on quality across the board³³. Glasgow is also well placed to serve the growing demand for city centre living³⁴ and to provide the ingredients for walkability and vibrancy that are becoming increasingly sought after.
- 2.1.8 Like many cities, Glasgow experienced the negative impacts of the pandemic, especially in the city centre. A collaborative [recovery plan](#) was swiftly brought together in 2022 and has led to an ambitious new [City Centre Strategy](#) that will guide the renaissance of the city centre in the coming years. A refreshed vision and action plan for a reimagined '[Golden Z](#)' which sets out the priorities for intervention and investment, by the public and private sectors, to further stimulate its economic recovery and support longer term economic, social and environmental resilience.
- 2.1.9 The east end has undergone significant growth over the past decade with [Clyde Gateway](#), an urban regeneration company set up in preparation for the 2014 Commonwealth Games, providing leadership, creating opportunity³⁵ delivering innovation³⁶, and driving growth while having people and communities across the east end of Glasgow as a key to decision-making³⁷.

³³ GCC/Invest Glasgow (March 2024) [Glasgow: City of Growth](#)

³⁴ GCC (June 2020) [City Centre Living Strategy](#)

³⁵ Clyde Gateway (Oct 2023) [Minister Hails New Investment as Construction Begins at Glasgow's Premier Advanced Manufacturing Park](#); (Aug 2023) [Work completes as former Victorian purifier shed is transformed into dynamic 'creative business hub'](#)

³⁶ Clyde Gateway (June 2023) [Deputy First Minister Unveils New Green Heating in Dalmarnock](#)

³⁷ GoWell (accessed March 2024) [GoWell East](#)

The Knowledge City

- 2.1.10 Glasgow is a city of applied knowledge. By European and global standards, a very high share of the city's workforce has achieved a high level of education and qualification³⁸ with 46% of Glasgow City Region residents obtaining a degree level educational attainment³⁹. 30% of Scotland's higher education students and postgraduate students choose to study in Glasgow.
- 2.1.11 Glasgow universities produce around 39,800 graduates a year, including over 7,000 science and engineering graduates and 2,555 computer graduates. Colleges are also an important component of Glasgow's attraction for students with 6 super colleges across the City Region. Together the region educates 185,000 students from 140 countries each year.
- 2.1.12 The city continues to draw an impressive number of international students⁴⁰ in to disciplines that businesses need, such as finance, engineering and life sciences. The city has a consistent track record of attracting and retaining talent, an education system that is highly responsive in preparing the next generation of the workforce via multiple routes and a high share of people working in higher-level occupations that makes the skills base more flexible to work disruption.
- 2.1.13 Glasgow's culture of business openness and Corporate Social Responsibility also makes the city attractive to young people starting out in their work journeys and the exceptional talent pool attracts global businesses⁴¹ and the only place in Scotland where children continue to outnumber over 65s.

³⁸ GCC/Invest Glasgow (accessed March 2024) [Why Glasgow? Concentration of Knowledge](#)

³⁹ Glasgow City Region (January 2021) [Glasgow City Region Economic Baseline](#)

⁴⁰ Erudera (2023) [UK International Student Statistics](#)

⁴¹ GCC/Invest Glasgow (Dec 2023) [Merck Credits Glasgow's Exceptional Talent Pool for Growth](#)

The Entrepreneurial City

2.1.14 Glasgow has experienced a very clear cycle of growth and diversification over the past two decades, strongly **growing its jobs base, halving its unemployment rate**⁴² (from 11.9% in 2010 to 4.8% in 2023), and honing strengths in high productivity sectors such as financial services and the creative industries.

Employee jobs (2022)				
	Glasgow City (Employee Jobs)	Glasgow City (%)	Scotland (%)	Great Britain (%)
Total Employee Jobs	431,000	-	-	-
Full-Time	298,000	69.1	67.3	68.8
Part-Time	133,000	30.9	32.7	31.2
Employee Jobs By Industry				
B : Mining And Quarrying	15	0.0	1.0	0.2
C : Manufacturing	18,000	4.2	6.9	7.6
D : Electricity, Gas, Steam And Air Conditioning Supply	4,000	0.9	0.8	0.4
E : Water Supply; Sewerage, Waste Management And Remediation Activities	2,500	0.6	0.7	0.7
F : Construction	18,000	4.2	5.7	4.9
G : Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	45,000	10.4	12.9	14.0
H : Transportation And Storage	12,000	2.8	4.1	5.0
I : Accommodation And Food Service Activities	32,000	7.4	8.4	8.0
J : Information And Communication	23,000	5.3	3.2	4.6
K : Financial And Insurance Activities	19,000	4.4	3.3	3.3
L : Real Estate Activities	8,000	1.9	1.3	1.9
M : Professional, Scientific And Technical Activities	40,000	9.3	7.4	9.1
N : Administrative And Support Service Activities	59,000	13.7	8.1	9.0
O : Public Administration And Defence; Compulsory Social Security	31,000	7.2	6.5	4.7
P : Education	39,000	9.0	8.8	8.6
Q : Human Health And Social Work Activities	63,000	14.6	15.7	13.5
R : Arts, Entertainment And Recreation	11,000	2.6	3.0	2.4
S : Other Service Activities	7,000	1.6	1.6	2.0
Source: ONS Business Register and Employment Survey : open access				
- Data unavailable				
Notes: % is a proportion of total employee jobs excluding farm-based agriculture				
Employee jobs excludes self-employed, government-supported trainees and HM Forces				
Data excludes farm-based agriculture				

Source: NOMIS (accessed March 2024) [Glasgow Profile](#) – Employee Jobs By Industry

⁴² NOMIS (accessed March 2024) [Unemployment time series data](#)

- 2.1.15 In spite of the pandemic, this trend has continued, with the Glasgow City Region demonstrating notable economic resilience with a quicker than anticipated recovery⁴³. Glasgow's scale – and its status as the major metropolis in the Scottish 'system of cities'⁴⁴ – has helped it to attract and serve many important company HQs and to develop a critical mass of specialist back-office functions⁴⁵.
- 2.1.16 Meanwhile a collective entrepreneurial mindset and independence of spirit are now helping drive a dynamic, rapidly growing and highly investible tech ecosystem⁴⁶.
- 2.1.17 The city region's eight local authorities are actively leading the ambition to translate entrepreneurial growth into a more inclusive economy⁴⁷ including by introducing an [Investment Zone](#) that will drive growth in priority sectors and boost the Region's competitiveness using up to £160 million fund to deliver economic growth, more high skill jobs, investment, provide specialist business support and improve local infrastructure.

⁴³ Glasgow City Region (various) [Intelligence Hub Economic Briefings](#);

⁴⁴ Scottish Government (January 2019) [Seven City Regions: Summary](#)

⁴⁵ GCC/Invest Glasgow (accessed March 2024) [Why Glasgow? Investment and Expansion](#)

⁴⁶ GCC (May 2023) [Investors and entrepreneurs show high confidence in Glasgow's regional tech sector](#)

⁴⁷ Glasgow City Region (various) (August 2023) [Glasgow City Region Annual Report 2022/23](#); (June 2023) [Creating an Emerging Economy Evidence Base](#); (August 2022) [Glasgow City Region Economic Action Plan](#); (August 2022) [UK Shared Prosperity Fund – Investment Plan 2022](#); (December 2021) [Glasgow City Region Economic Strategy](#); (June 2021) [Glasgow City Region Foundational Economy](#); (March 2019) [Glasgow City Region Regional Skills Investment Plan 2019-2024 \(Mar 2019\)](#)

The Business City

- 2.1.18 Glasgow's status as an established destination for corporate and real estate investment⁴⁸ and a preferred location for FTSE100 and AIM listed companies, has helped it to become recognised as a prosperous region that is open for business. As a national leader in insurance, maritime and whisky production with an [International Financial Services District](#) that continues to expand and new innovation districts set to be unlocked, the city's investment and employment activity has proven to be more resilient than most to the effects of the pandemic.
- 2.1.19 Glasgow is now home to the UK's joint largest concentration of insurance firms outside of London, is the top UK city for residential buyer demand, and has the largest office submarket outside of the capital.
- 2.1.20 The agile and can-do attitude of the indigenous investee businesses and investment managers help to get deals done, while the "Team Glasgow" approach, underpinned by a proactive City Council and strong links between the city's conference centres, universities, hotels and retail sector, combine effectively to attract new businesses to the region and build a compelling inward investment offer⁴⁹. A policy priority for Glasgow is to grow its high-skilled exporting base⁵⁰.

⁴⁸ GCC/Invest Glasgow (accessed March 2024) [Glasgow is a mature investment proposition and established business hub](#)

⁴⁹ GCC/Invest Glasgow (2022) [Greenprint for Investment](#)

⁵⁰ Centre for Cities (June 2023) [The role of Glasgow and Edinburgh in the Scottish economy](#)

[The Innovative City](#)

- 2.1.21 For a medium sized city, Glasgow already produces an impressively wide range of world-class science and technology expertise and is recognised as one of only three innovation clusters with high potential by the UK Government⁵¹. Glasgow has commercial edges in nanotech⁵², [life sciences](#), [digital media](#), [energy](#) and [advanced manufacturing](#), is a global capital of the [space and satellite industry](#) and has a rapidly expanding [Fintech](#) and tech meetup scene.
- 2.1.22 These sectors are served by Glasgow's technology platform, breadth of technical skills and efficient regional scale. Over the past ten years, the [BioCorridor](#) has enabled the growth of MedTech, precision medicine, pharmaceutical services and industrial biotechnology.
- 2.1.23 Glasgow's innovation and start-up eco-system continues to improve⁵³, thanks to improved networking and policies to strengthen entrepreneurship as well as the development of new Innovation Districts⁵⁴ at [Glasgow Riverside Innovation District](#) (GRID) and [Glasgow City Innovation District](#) (GCID). Eleven new projects were awarded a share of £100 million in March 2023 as part of the UK levelling up agenda including Glasgow's Innovation Accelerator⁵⁵. The kinds of sectors in which Glasgow has an edge are driving long-term upgrades to the performance and competitiveness of the wider city region economy.

[The Educational City](#)

- 2.1.24 Glasgow's universities and colleges remain globally visible and resonant. They are re-connecting the city with its DNA of creativity, engineering and design and contribute significantly to the UK economy⁵⁶.
- 2.1.25 Alongside world-leading research capabilities, Glasgow's universities also generate high levels of industry collaboration⁵⁷, research council funding, company spinouts⁵⁸ and student satisfaction. As a result, Glasgow is the only city in the UK outside of London to have 2 universities ranking in the top 40 nationally.

⁵¹ UK Research and Innovation (March 2023) [£100m R&D levelling up funding awarded to accelerate innovation](#)

⁵² UK Government (June 2019) [Big boost for tiny tech](#)

⁵³ GCC/Invest Glasgow (Jan 2024) [Launching Europe's Largest Smart Things Hub](#)

⁵⁴ GCC/Invest Glasgow (March 2024) [Glasgow: A City Region Building on its Innovation & Knowledge Economy](#)

⁵⁵ University of Glasgow (March 2023) [Glasgow's Innovation Accelerator moves forward with share of £100 million project boost](#)

⁵⁶ London Economics/University of Glasgow (2021) [The Economic Impact of the University of Glasgow](#)

⁵⁷ GCC/Invest Glasgow (Nov 2023) [World-Class Health Innovation Hub to be Built in Govan](#)

2.1.26 Along with colleges, Glasgow universities have a track record of working with business to deliver bespoke courses tailored to future needs of its rapidly changing industrial and business base. As Glasgow's education providers apply the city's 250-year record of design to corporate and public goals, they are becoming proactive anchors of a changing city, identifying common interests and agendas for action and staking out a leading role in the journey to achieving the sustainable development goals⁵⁹.

[The Connected City](#)

2.1.27 Glasgow has the scale and capacity of infrastructure to access much wider markets and also achieve regional resilience. Glasgow is a gateway city, home to the UK's 2nd busiest non-London railway station. An important node in the Scottish, UK and European transport network, Glasgow matches international connectivity via its airport and rail connections with an efficient and ambitious internal network based around the ongoing modernisation of the world's 3rd oldest subway and aspirations for a wider multi-modal transport system under the [Clyde Metro](#) umbrella ([map](#)).

2.1.28 The cluster of national renewable energy groups in the region makes it a global leader in green energy sources⁶⁰ and it has a world-leading commitment to the net zero transition⁶¹.

2.1.29 Glasgow is also a digital-ready city⁶². As the city with the highest long-range Internet of Things (IoT) coverage and a nationally competitive 4G/5G infrastructure⁶³ and fibre rollout, Glasgow has the digital backbone to support a more flexible and hybrid future of work and lifestyle and the communication solutions required for sustainable, attractive and resilient cities.

[The Event City](#)

2.1.30 Glasgow is internationally recognised as a destination to visit because of its hospitality, retail appeal and ability to consistently and professionally cater to a vast array of high-level meetings and events.

⁵⁸ Scottish Enterprise (August 2023) [Scottish Universities Spin Out Review](#)

⁵⁹ University of Glasgow (April 2022) [Breaking the shackles of underperformance in Scotland](#)

⁶⁰ GCC/Invest Glasgow (accessed March 2024) [Clusters Energy and Green Transition](#)

⁶¹ GCC (2021) [Glasgow Green Deal](#)

⁶² GCC (accessed March 2024) [Digital Glasgow](#) website

⁶³ GCC/Invest Glasgow (Nov 2023) [Glasgow City Region Named as One of Ten 5G Innovation Regions](#)

- 2.1.31 The city has become a proficient and creative year-round host of large-scale conventions, accommodating significant increases in tourist visits and growing demand for memorable cultural experiences.
- 2.1.32 Glasgow's mix of venues and activities, willingness to experiment and high value for money, create a retail and events scene that has become globally acclaimed while being both accessible and family friendly.

The Lifestyle City

- 2.1.33 Glasgow has experienced significant increases in the city's appeal to millennial and career-age talent in recent years. Disposable income, efficient infrastructure and high levels of openness, social cohesion and inclusivity are important differentiators for Glasgow and will become even more so as the balance shifts in what talent seeks from cities.
- 2.1.34 The friendly Glaswegian spirit, excellent work-life balance and relative affordability⁶⁴ mean that Glasgow is increasingly seen, not only as a place to "get on the property ladder", but also a "place to call home", a "place to return to", and a "place to rediscover what matters".
- 2.1.35 Access to high-quality amenities and high levels of life satisfaction make Glasgow one of the UK's most cosmopolitan and family-friendly of cities, while the region also has the ingredients to support the next generation of freelancers and remote workers seeking out high quality live-work-play experiences and a more seamless and hybrid urban lifestyle.

The Sustainable City

- 2.1.36 Glasgow's early adoption of sustainable policy in various industries and its leadership on climate and environmental agendas, has firmly established it as a city that leads by example when it comes to sustainability⁶⁵.
- 2.1.37 Glasgow is undertaking widespread transformation to both adapt to and mitigate against climate change. With a binding commitment to become a Net Zero Carbon city by 2030, Glasgow can claim several UK and European "firsts". Such as being the first city outside London to introduce a low-emission zone, the first to introduce an electric bus fleet to its airport car parks and the first European convention bureau to receive a Green Tourism award.

⁶⁴ GCC/Invest Glasgow (Oct 2023) [Glasgow Named Best City for First-Time Buyers in the UK](#)

⁶⁵ GCC/Invest Glasgow (Dec 2023) [University of Glasgow Launches Glasgow Centre for Sustainable Energy](#)

- 2.1.38 Glasgow’s green credentials are very strong, even by European standards and are set to grow even further as a result of significant investment in the regional Green Network and a commitment to a green funding model in a bid to secure massive investment in a climate resilient future⁶⁶.
- 2.1.39 This is enhanced by a diverse range of pipeline projects of scale openly inviting green commercial investment. The city’s recent hosting of COP26 was an important watershed in enabling Glasgow to communicate these sustainability advantages to the world and provided a window of opportunity for Glasgow to strengthen its appeal to talent and businesses serious about their ESG commitment.
- 2.1.40 The [Thriving Glasgow Portrait](#) and the [Clyde Mission](#) project are both examples of emerging approaches that have the potential to positively shape and deliver a sustainable city. Clyde Mission is a project focussed on the improvement of the riverside corridor running from Glasgow city centre to the sea. Spanning an area of 1,000 hectares and drawing together ambitious initiatives for green transport and renewable energy, it aims to decontaminate large tracts of land in this key location.^{67 68}

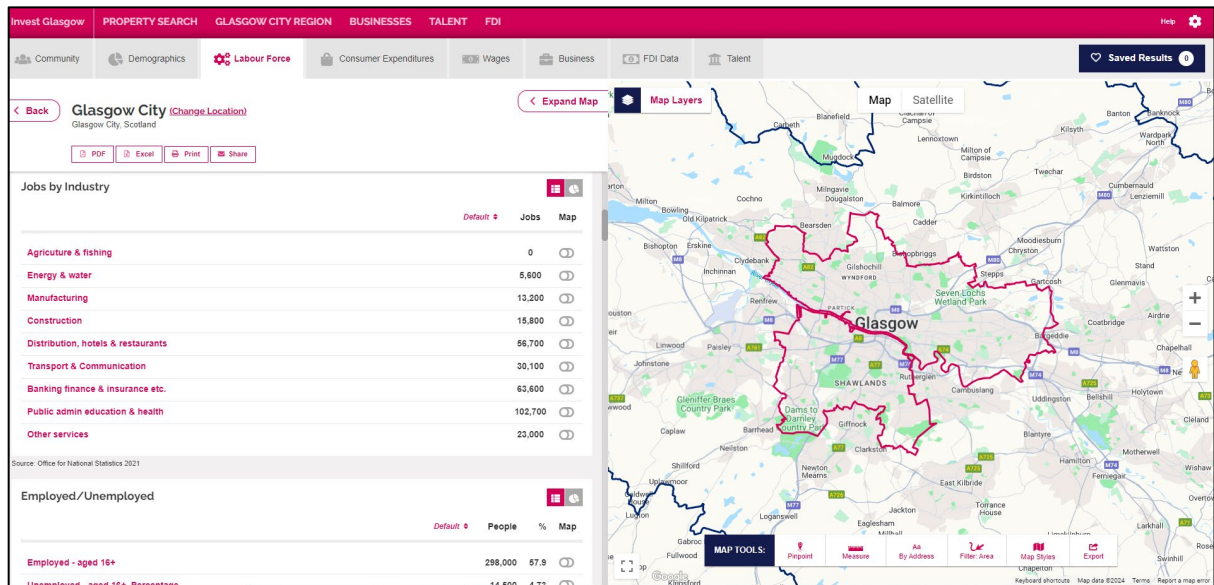
⁶⁶ GCC/Invest Glasgow (Nov 2023) [Green Investment Plan for Glasgow announced](#)

⁶⁷ Scottish Hub for Regional Economic Development (accessed March 2024) [Clyde Mission: innovation in digital mapping](#)

⁶⁸ UCL (July 2021) [The Clyde Mission Case Study: Challenge-led funding](#)

2.2 Key Data Sources

2.2.1 [Invest Glasgow](#), operated by the economic development service of Glasgow City Council collates economic information about the city via a [data dashboard](#) and hosts an up-to-date list of marketed properties via a [property dashboard](#).



Source: GCC/Invest Glasgow

2.2.2 The Council also occasionally publish [demographic and socio-economic briefing notes](#) on their website.

2.2.3 A regular source of information about a range of economic indicators, including those that would inform analysis of employment need, local poverty, disadvantage and inequality, is published by [Nomis Official Census and Labour Market Statistics](#) for the [Office for National Statistics \(ONS\)](#) via the [Nomis Glasgow City profile](#). The National Records of Scotland have published a [Glasgow City Council Area Profile](#) summarising the main demographic trends.

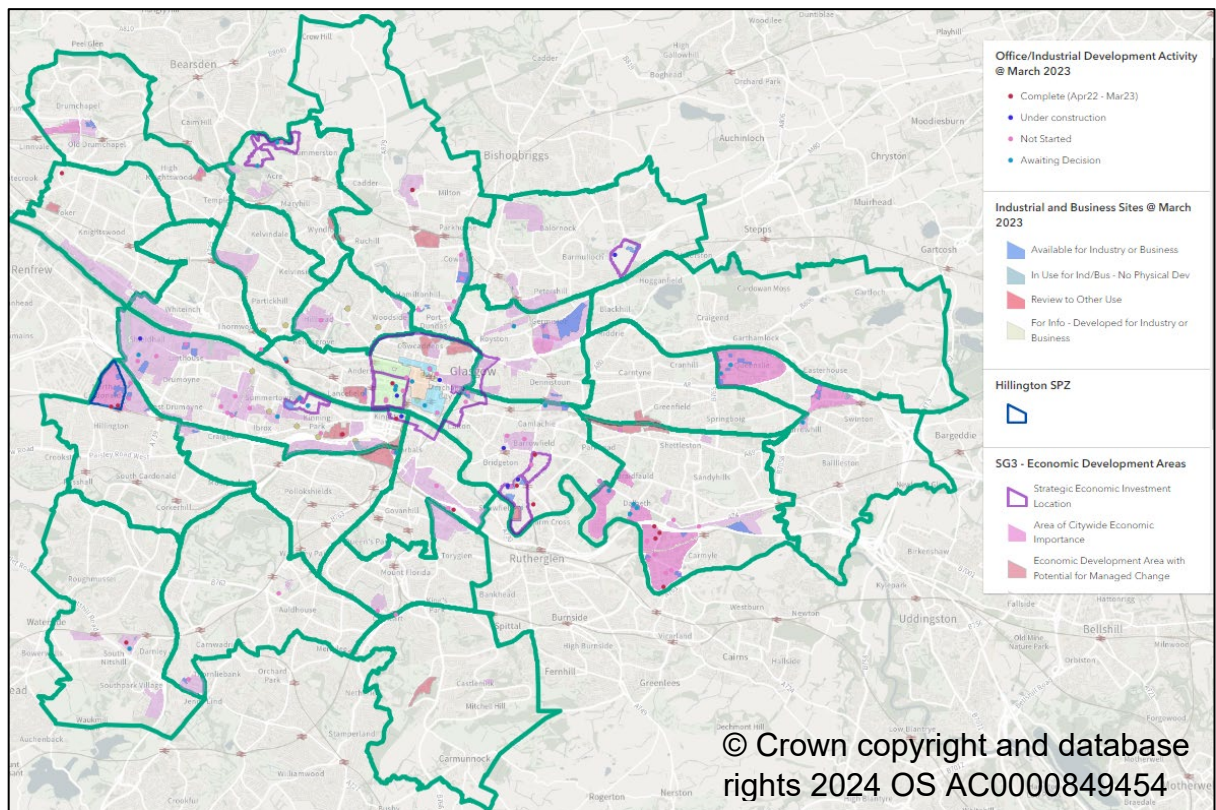
2.2.4 As an integral component of the Glasgow City Region, data about Glasgow's economy is also collated by the [Intelligence Hub](#). This includes the [shared economic baseline data](#).

2.2.5 The [Centre for Cities published a city factsheet](#) that includes economic headlines from 2022 but encompasses an alternative geography for 'Glasgow' that incorporates parts of East Renfrewshire, East Dunbartonshire and Renfrewshire as the primary urban area.

3 Scale of the Industrial and Business Land Supply

3.1 Industrial and Business Land Supply

3.1.1 The [Industry and Business Land Supply Survey](#) provides an annual snapshot of the land supply position at 31 March each year and is also published in [interactive map form](#).



Source: GCC, Industrial and Business Land Supply and Development Activity @ March 2023 map

3.1.2 At 2023, 92.76 hectares were identified as available, consisting of 51.99 hectares of marketable land and 40.77 hectares of other land for industry and business purposes.

3.1.3 In context, the headline finding means that the city recorded the lowest amount of marketable land since the survey began, equivalent to 23% of the land available for business and industry uses at the adoption of City Plan 1 in 2004.

3.1.4 The graph below illustrates the gradual decline in the scale of the land supply each year from 2012/13, when it accounted for around 200 hectares of land, to 2022/23, when it accounted for 92.76 hectares.



Source: GCC, derived from annual industrial and business land supplies

3.1.5 There were 60 sites recorded in 2023, the majority of which (34) were under 1 hectare in size. There were 23 sites of between 1 and 4 hectares (~10 acres). There were 3 sites of more than 4 hectares (at Provan Gas Works, 21.66 hectares; Kenmuir Road, 6.6 hectares; and Carlisle Road, 5.4 hectares).

3.1.6 The [Industrial and Business Land Supply for 2023](#) also details the status of the 60 remaining sites and shows that the headline figure of 92.76 hectares masks the advanced progress through the planning system of many of the remaining sites.

3.1.7 For example, planning permission to build HMP Glasgow at the Provan Gas Works site, which alone accounts for 23% of the remaining 92.76 hectares of industrial and business land supply, is well advanced. The Carlisle Road site accounts for 5.6% of the supply and has gained planning permission in principle for a mix of uses including an element of residential and commercial use.

3.1.8 Appendix A provides a summary of the land supply for each ward. Of the 83 Economic Development Areas in the City Development Plan, 26 have at least one site identified in the Industrial and Business Land Supply at 2023.

3.1.9 The table below summarises the ward position (note that EDAs column does not sum to city total as some EDAs cross ward boundaries). Ward 5 Govan has the most Economic Development Areas with 16. It also has the second highest number of sites (7) and total area (14.36 hectares) identified at 2023. Ward 20, Baillieston includes both Queenslie Industrial Estate and Glasgow Business Park and had the most sites (8) identified at 2023 and fourth most land identified (10.33 hectares). Ward 22, Dennistoun had the most land identified in the supply (24.67ha) but 21.66 hectares of that are the Provan Gas works site.

Industrial and Business Land Supply 2023 by Ward

Ward Name	Number of Economic Development Areas	Available Sites	Site Area (hectares)
1. Linn	2	0	0
2. Newlands/ Auldburn	2	2	1.21
3. Greater Pollok	3	2	1.74
4. Cardonald	4	7	7.83
5. Govan	16	7	14.38
6. Pollokshields	2	1	0.86
7. Langside	3	0	0
8. Southside Central	2	0	0
9. Calton	3	8	8.05
10. Anderston /City/Yorkhill	7	1	1.01
11.Hillhead	4	1	0.26
12. Victoria Park	1	0	0
13. Garscadden/ Scotstounhill	2	0	0
14. Drumchapel/ Anniesland	3	3	2.4
15. Maryhill	5	3	0.86
16. Canal	5	4	6.71
17. Springburn/ Robroyston	4	2	2.63
18. East Centre	1	0	0
19. Shettleston	7	6	12.44
20. Baillieston	3	8	10.33
21. North East	0	0	0
22. Dennistoun	9	5	24.67
23. Partick East/ Kelvindale	1	0	0
City Total	83	60	92.76

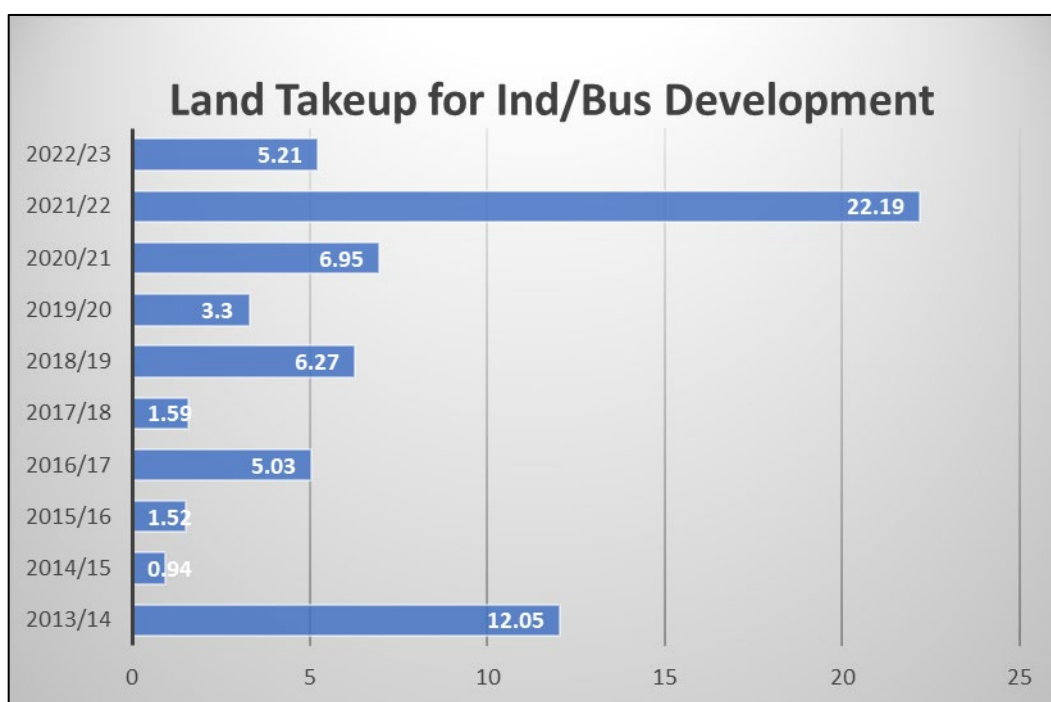
Source: GCC derived from City Development Plan (2017) and Industrial and Business Land Supply 2023

- 3.1.10 **Key Issue:** The scale of the land available to develop is much reduced compared with the past few decades. If the reduction in the industrial land supply continues at the rate that it has over the past 10 years, without additional sites being identified, either in new locations, or via the re-development of existing buildings and plots, then it would become depleted during the next Development Plan period.
- 3.1.11 **Key Issue:** There are only three sites of over 4 hectares (~10 acres) in the supply, two of which have permission for alternative uses.
- 3.1.12 **Key Issue:** The land supply is not distributed evenly across the city. Eight of the 23 wards have no recognised land available for business and industry uses and one ward does not have an Economic Development Area from which new opportunities might arise. Only ward 5 Govan of those wards located south of the river (wards 1 to 8) has more than 4 hectares of land identified within it. Likewise, only ward 16, canal, in the west of the city has more than 4 hectares identified at 2023. The east of the city (ward 9, and wards 17 to 22) has four wards with more than 4 hectares identified.

3.2 Development of the Land Supply for Industry and Business purposes

3.2.1 The annual [Business and Industrial Monitoring Statements](#) published by the Council also provide updates about development of land for industry and business purposes over the previous year (referred to as 'take-up').

3.2.2 The [Business and Industrial Monitoring Statement March 2023](#) indicates that there was 5.21 hectares taken-up for industrial and business uses during the period April 2022 to March 2023.



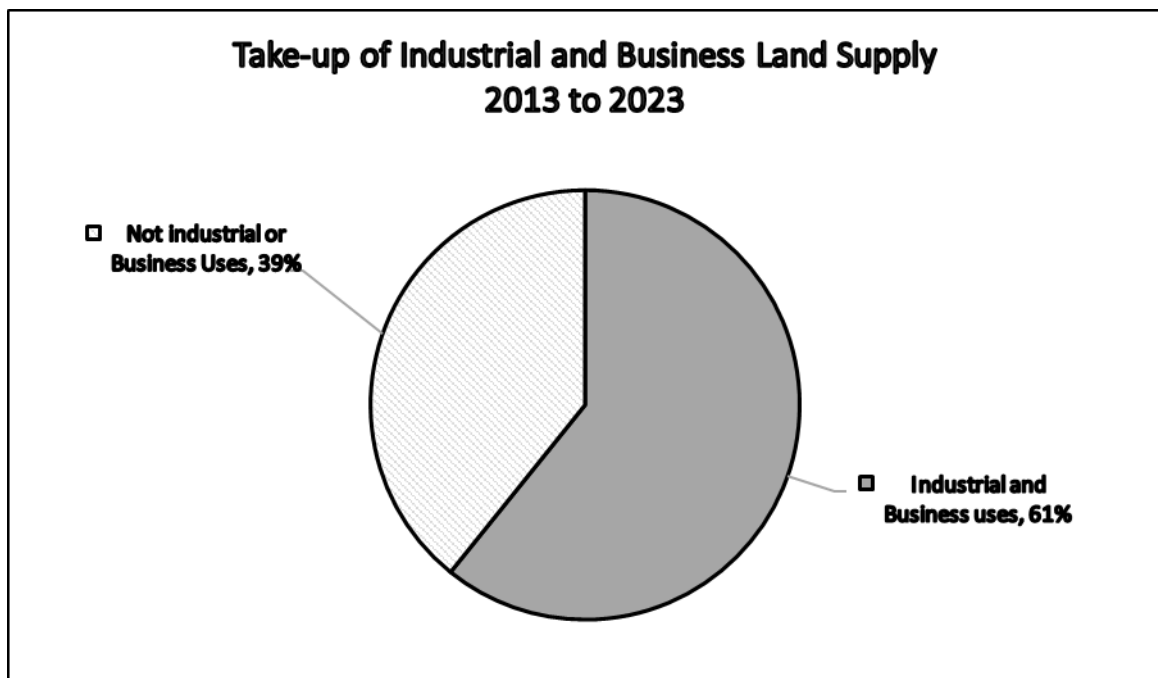
Source: GCC, derived from annual Monitoring Statements

3.2.3 Using a combination of past Business and Industrial Monitoring Statements it can be derived that there has been 65.05 hectares of take up for industry and business purposes over the past 10 years (2013 to 2023).

3.2.4 This has resulted in 349,029 sqm of new **office** floorspace, 88,626 sqm of new **industrial** floorspace, 100,571 sqm of new **storage and distribution** floorspace and 34, 280 sqm of **other new business and industry** floorspace.

3.2.5 This compares with 112.95 ha over the previous decade (2003 to 2013) generating 536,463 sqm of new office floorspace, 87,568 sqm of new industrial floorspace, 128,072 sqm of new storage and distribution floorspace and 38,432 sqm of other new business and industry floorspace.

- 3.2.6 Comparing the two decades indicates that there was less take-up of the industrial and business land supply overall, generating less office floorspace space, less storage and distribution floorspace, less other new business and industry floorspace but slightly more industrial floorspace being developed over the past 10 years (2013 to 2023) compared with the previous 10 (2003 to 2013).
- 3.2.7 Also notable is that while the land supply decreased by around 107 hectares over the past 10 years (2013 to 2023) only 65.05 hectares (~61%) was taken up for industrial and business use. Consequently, a significant proportion (~39%) of take-up of the industrial and business land supply over the past 10 years has been for non-industrial uses including residential developments.



Source: GCC, derived from annual Monitoring Statements

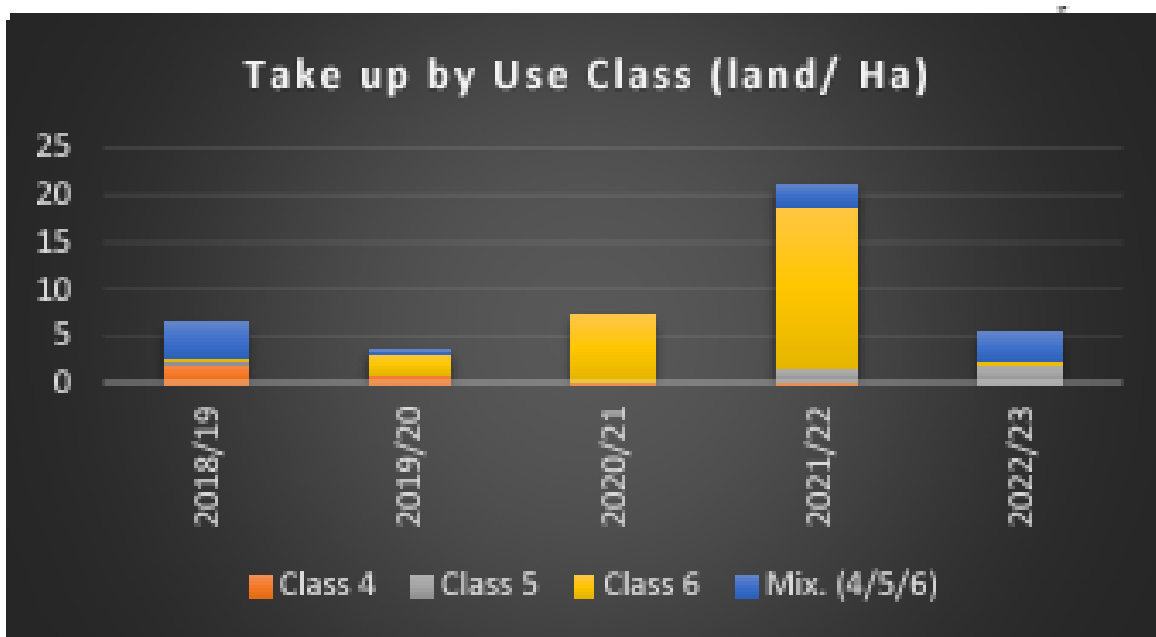
- 3.2.8 An example of non-industrial or business take-up of the industrial and business land supply is the Persimmon residential development at Darnley Mains. Formerly identified as a high amenity site with the potential to attract corporate headquarters, over the course of the past 7 years 340 new homes have been built over 12.74 hectares, with a proposal to construct a further 22 homes and neighbourhood facilities on the remaining 1.37 hectares of land.

3.2.9 **Key Issue:** Take-up of land within Economic Development Areas for other uses has been at a scale/rate significant enough to impact on the overall provision – around 40%.

3.2.10 **Key Issue:** Over the past decade the land supply appears to have been able to accommodate significant amounts of new industry and business uses, however the relative reduction in new floorspace for office, storage and distribution and other industry and business uses over the past decade compared with the decade before is a concern. While this may reflect the poorer economic conditions it could also be a symptom of the smaller supply of land identified for new Industrial and Business uses.

Take-up by Use Class

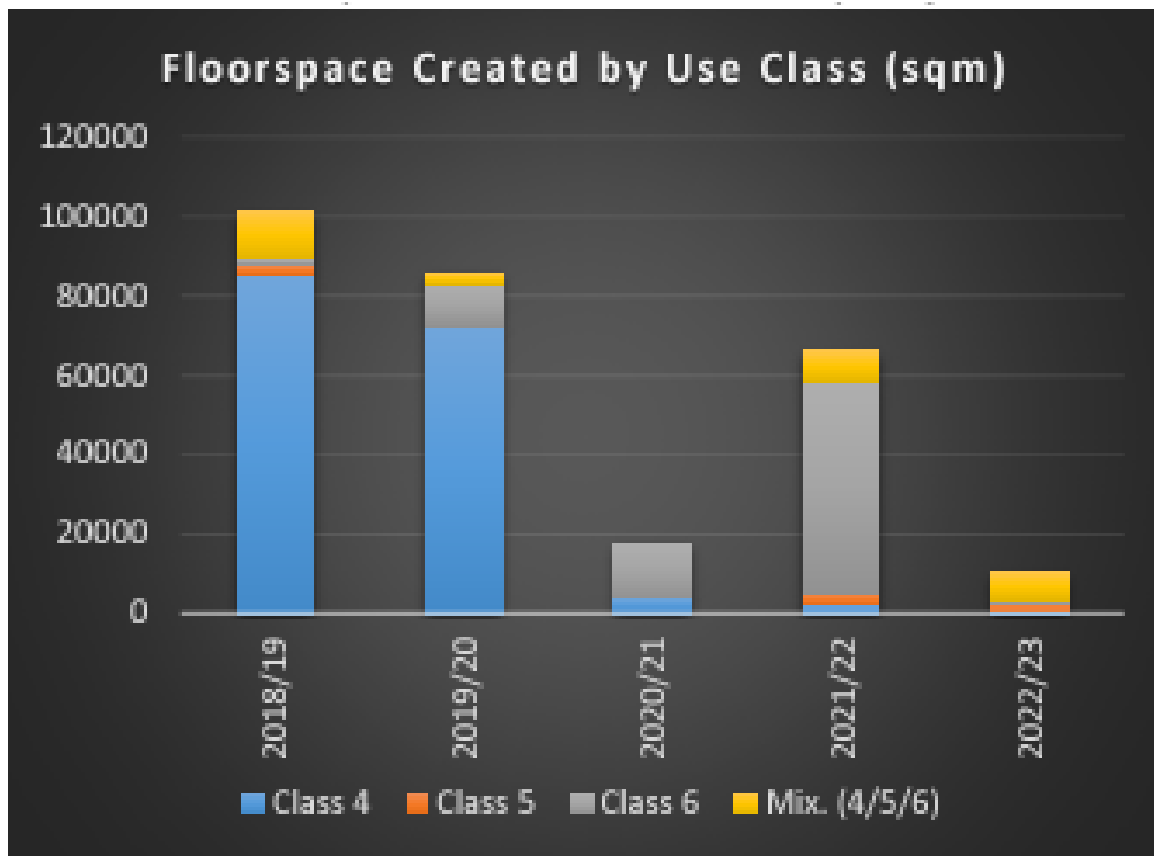
3.2.11 The latest annual monitoring statement shows that take-up of land for storage and distribution warehousing (“Class 6”) has formed the bulk of recent take-up.



Source: GCC, Annual Monitoring Statement 2022/23

3.2.12 The spikes in take-up in 2020/21 and 2021/22 are the result of two large storage and distribution schemes for Amazon, at Glasgow Business Park and Harper Collins, at Robroyston impacting on the take-up overall rather than lots of smaller schemes taking up land.

3.2.13 **Key Issue:** Recent spikes in demand for large-scale storage and distribution uses have had the largest impact on reducing the supply in recent years.



Source: GCC, Annual Monitoring Statement 2022/23

- 3.2.14 The statement also records the reduction in new floorspace created via new office developments over the past 5 years. Highlighted very clearly by the change from the period 2018 to 2020, where the majority of new floorspace in the city was for office use, and then lack of new office floorspace created following the pandemic.
- 3.2.15 This is particularly noteworthy within the context of the findings of the Glasgow City Council et al (August 2023) [A vision + plan for the golden z \(summary and appendices\)](#) which included that the “*number of new office lettings in Glasgow in the first three quarters of 2022 was at the highest level since records began in 2013*”.
- 3.2.16 **Key Issue:** Lack of new office floorspace being create compared with pre-pandemic levels in the face of relatively high demand.

3.3 Distribution of the Land Supply by ward

- 3.3.1 The Economic Development Areas, and therefore the industrial and business land supply, are broadly located in a halo around the city centre and along the Clyde. Planned estates and business parks established in the late-20th century are an exception to this and are broadly located along arterial road routes.
- 3.3.2 Appendix A provides a summary of the spatial distribution of Economic Development Areas and available land for business and industry grouped by wards.
- 3.3.3 It demonstrates the concentration of policy support, and associated land supply, to just a few wards. Ward 5 Govan is remarkable in terms of the scale and range of locations stretching from the George V docks at Shieldhall in the west, through the University of Glasgow's emerging Glasgow Riverside Innovation District (GRID) including the Queen Elizabeth University Hospital campus, through the Helen Street and Woodville Street clusters (industrial estates south of Govan town centre), past the media cluster and former Enterprise Zone at Pacific Quay SEIL to another traditional cluster of businesses at Kinning Park in the west.
- 3.3.4 Ward 10, Anderston/City/Yorkhill includes 7 Economic Development Locations across 2 geographies. The City Centre Strategic Economic Investment Location includes within it the International Financial Services District (IFSD), Townhead EDA, as well as the University Campuses of Glasgow Caledonia University and University of Strathclyde. It also includes the Glasgow City Innovation District (GCID) which has emerged from the City Science/ITREZ Economic Development Area identified in the City Development Plan. Noting that in the city land that becomes available is not automatically added to the industrial and business land supply because the support is for a mix and range of uses beyond class 4, 5 and 6. Finnieston Economic Development Area is also within Ward 10 and includes 1.01 hectares of available land with planning permission for offices. An alternative proposal has been made to develop the site for residential purposes.
- 3.3.5 Eight wards had no recognised industrial land supply sites at 31 March 2023 including 01, Linn; 07, Langside; 08 Southside Central; 12 Victoria Park; 13 Gascadden/Scotstounhill; 18, East Centre; 23, Partick East/Kelvindale. Ward 21, North East did not include a recognised economic development area nor did it have any industrial land supply sites.

Take-up by ward

3.3.6 The following table presents the take-up the land supply in each ward between 2012/13 and 2021/22.

Ward Name	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	10 yr Tot
1. Linn											0
2. Newlands/Auldburn											0
3. Greater Pollok				0.19							0.19
4. Cardonald	0.15	0.15		0.45					1.09		1.84
5. Govan				0.46		0.69	0.38		4.47	2.25	8.25
6. Pollokshields											0
7. Langside											0
8. Southside Central	5.55			0.43		0.24			0.13		6.35
9. Calton	3.6	0.16	0.43		0.26	0.6	0.34	0.3	1	1.79	8.48
10. Anderston /City/Yorkhill	1.72		0.3		0.6	0.29	0.61				3.52
11. Hillhead											0
12. Victoria Park											0
13. Garscadden/ Scotstounhill				0.93							0.93
14. Drumchapel/ Anniesland				0.59							0.59
15. Maryhill						0.89					0.89
16. Canal											0
17. Springburn/ Robroyston									13.7		13.7
18. East Centre											0
19. Shettleston	0.23	0.63		1.98	0.73	2.41	1.97		1.34	1.17	10.46
20. Baillieston	0.8		0.79			1.15		6.65	0.46		9.85
21. North East											0
22. Dennistoun											0
23. Partick East/ Kelvindale											0
City Total	12.05	0.94	1.52	5.03	1.59	6.27	3.3	6.95	22.19	5.21	65.05

Source: GCC, derived from Annual Monitoring Statements

3.3.7 Take-up across the city is not distributed evenly across geographies nor steady across time. This is demonstrated by the table above which shows take-up across each ward, each year, over the period 2012 to 2022.

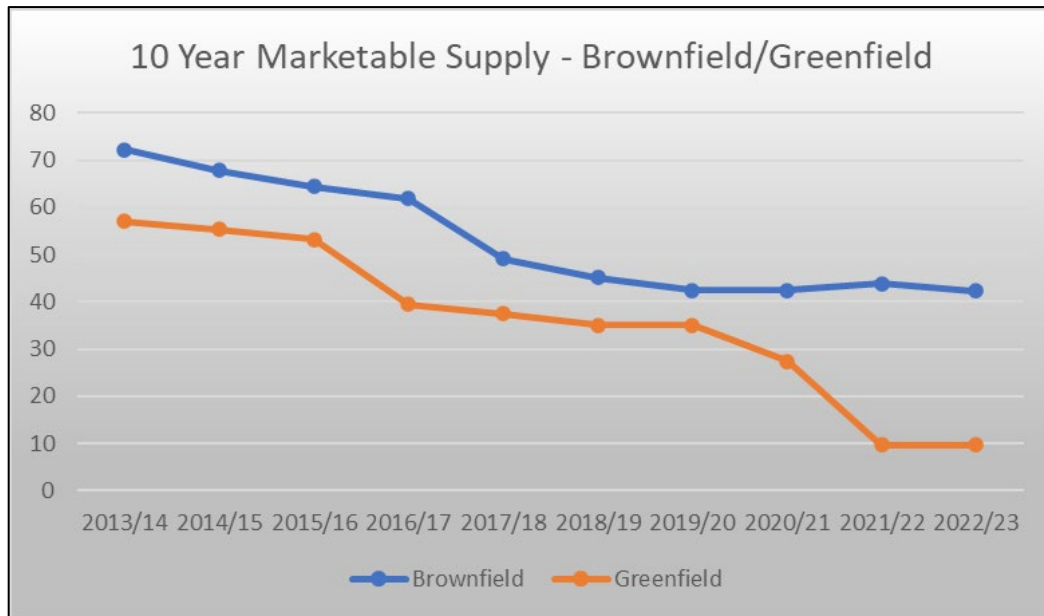
3.3.8 The stand-out locations have been Shettleston (10.46 ha), where Clyde Gateway at Clyde Gateway East has contributed to development and driven the take-up in that ward making it the most active ward in that regard. Clyde Gateway have similarly been active in Carlton where 8.48 ha was taken up across the decade. Baillieston, Govan and Southside Central have also recorded more than 5 ha of take up over the decade.

3.3.9 **Key Issue:** Clyde Gateway Urban Regeneration Company has played a key role in unlocking, marketing and delivering sites in the east end and its uncertain future status is a concern for that area rolling forward. Another potential concern is the lack of any take-up (perhaps linked with lack of opportunities) in some wards.

3.4 Focus of new development - brownfield/greenfield

3.4.1 The City Development Plan follows the compact city model as described by the Clydeplan Strategic Development Plan 2017. This prioritises support for the redevelopment of brownfield locations in preference to greenfield and greenbelt locations. This priority is reflected in the identification of Economic Development Areas as the majority are, and have been, brownfield locations.

3.4.2 The 51.99 hectares of marketable supply comprises both brownfield and greenfield opportunities as part of the aim to provide a range of sites that meet current market demand, location, size, and quality in terms of accessibility and services. Over the past 10 years these have both decreased in scale as illustrated by the graph below.



Source: GCC, derived from annual Industrial and Business Land Supply Reports

- 3.4.3 At 2023, there was around 10 hectares of marketable greenfield land and around 41 hectares of marketable brownfield land, down from around 58 hectares and 72 hectares in 2014 respectively.
- 3.4.4 Around two thirds of the industrial land supply that has been taken-up over the past 10 years has been on brownfield sites while around one third has been on greenfield sites.

3.4.5 The annual Monitoring Statements provide a broader picture of industrial and business floorspace created including developments in the city centre. It recorded that 94% of new industry and business developments built in Glasgow over the past 10 years have been on brownfield sites. The remaining 6%, accounting for 22.39 hectares of land take-up, were built on greenfield sites across the city. There was no industrial and business floorspace created in the greenbelt.

3.4.6 **Key Issue:** While not the major component of land take-up, greenfield locations have nevertheless played a role in attracting and growing the business base across Glasgow and there is now very little greenfield marketable supply available. The attractiveness of the West of Scotland Science Park (WOSSP), as an example of the benefits of developing a greenfield location, is clear. However, there are constraints on increasing the capacity and/or recreating a similar intervention elsewhere presented by environmental constraints like the ancient woodland designation at WOSSP and the emerging national commitment to 20-minute neighbourhoods.

3.5 Focus of new development – Economic Development Areas and the City Centre

3.5.1 The City Development Plan identifies 83 Economic Development Areas within the city where industrial and business uses will be supported in principle. These locations form the foundation for the industrial and business land supply but the policy frameworks for each vary depending on their designation and any other policy aims and outcomes that are attributed to them.

3.5.2 The annual Industrial and Business Land Surveys have indicated that 69% of new industrial and business development floorspace over the past 10 years has been located within an Economic Development Area while 31% has been delivered elsewhere.

- 3.5.3 **Key Issue:** The records suggest that the Economic Development Areas remain important for the creation of new industry and business floorspace despite the broader support in the City Development Plan for business expansion and the re-use of brownfield land (wherever it may arise).
- 3.5.4 Most business and industry developments in the City Centre come in the form of brownfield re-development into tall offices with a relatively small footprint over multiple floors creating a large floorspace overall.
- 3.5.5 Over the past 10 years there has been 236,550 gross sq m of floorspace created in the City Centre resulting in 4.55 ha of land being taken up for re-development.
- 3.5.6 **Key Issue:** A continued, and significant scale, demand for the development, and subsequent letting of, Grade A office space in the City Centre has been recorded. At 2023, market reports indicated that there was no Grade A office space available or in the pipeline and no land reserved as such in the supply.

4 Policy and Market Drivers for Land Use Planning

4.1 City Development Plan Policy Context

4.1.1 The City Development Plan was adopted in 2017 and identified 80 Economic Development Areas (EDAs) that comprise the City's established industrial and business areas or locations where new clusters were expected to emerge during the plan period – most notably around the hospitals, universities and the city centre.

4.1.2 Together the EDAs were identified as having the potential to contribute to the Plan's aim to promote the creation of economic opportunity for all the City's residents and businesses and encouraging sustained economic growth.

4.1.3 In order to ensure a wide range of options were available to prospective occupiers, the Council reviewed and [agreed to categorise](#) Economic Development Areas into one of five categories dependent on their existing role and function and their likely impact on the wider city or regional economy. Three sites were split during this assessment creating 83 locations.

8 Strategic Economic Investment Locations (SEILs).

8 Areas of City-Wide Economic Importance (ACWEIs).

14 Economic Development Areas with the Potential for Managed Change.

10 Economic Development Areas around health or university campus'; and

43 *standard* Economic Development Areas

4.1.4 Subsequently, five strategic development frameworks and three local development frameworks were developed for parts of the city. These encompassed many, but not all, of the Economic Development Areas and set out updated policy principles for the future development of these locations.

4.1.5 The new planning system has changed the hierarchy of plans. It removed Strategic Development Plans and added a statutory status and development management role to the National Planning Framework. The National Planning Framework now includes both instruction for the formulation of future local plans and policies as well as a distinct decision-making framework for determining planning applications.

4.1.6 Given the change in policy context, and the importance to be placed on business and industry audits under the new planning system, an updated audit was initiated in 2023 and finalised in March 2024.

4.2 Glasgow's Economic Policy Commitments

National Policy

- 4.2.1 The Scottish Government set out the priorities for Scotland's economy via Scotland's [National Strategy for Economic Transformation](#) - NSET (March 2022) and in terms of land use in [Scotland's third Land Use Strategy 2021-2026: Getting the best from our land](#) (March 2021).
- 4.2.2 NSET describes a vision for a wellbeing economy that is fairer, wealthier and greener. Six programmes of action are identified including a focus on supporting entrepreneurial people and culture; exploiting new market opportunities; pushing for more productive businesses and regions, preparing a skilled workforce for the jobs of the future while aiming for a fairer and more equal society with a culture of delivery.
- 4.2.3 In relation to cities and the urban economy, the strategy highlights that ensuring Scotland's cities are able to compete, and win, against other major European or world cities, remains an important approach to driving productivity improvements.
- 4.2.4 The Scottish Government set out its funding for these programmes in its [Programme of Government 2023 to 2024](#) and selected 14 indicators it will use to monitor success in its [Wellbeing Economy Monitor](#) (December 2023) including three with data at a Glasgow level.

Human Capital: proportion of working age people with low or no qualifications.

Qualifications (Jan 2022-Dec 2022)				
	Glasgow City (Level)	Glasgow City (%)	Scotland (%)	Great Britain (%)
RQF4 And Above	220,700	54.4	54.2	45.7
RQF3 And Above	284,500	70.2	72.8	66.9
RQF2 And Above	327,900	80.9	86.0	85.8
RQF1 And Above	334,200	82.4	87.5	88.5
Other Qualifications	25,600	6.3	4.5	4.7
No Qualifications	45,500	11.2	8.0	6.8

Source: ONS annual population survey
 Notes: For an explanation of the qualification levels see the definitions section.
 Numbers and % are for those of aged 16-64
 % is a proportion of resident population of area aged 16-64

Source: ONS annual population survey via [Nomis Glasgow Profile](#)

- 4.2.4.1 In Glasgow, 11.2% of working age adults (45,500 people) have no qualifications putting them at a disadvantage. This figure fluctuates each year but has roughly decreased from around 24.2% (89,100 adults) in 2005. The trend is in line with wider Scotland and UK patterns but remains higher than that of Scotland (8.0%) and the UK (6.8%).

Human Capital: proportion of children in low income and material deprivation

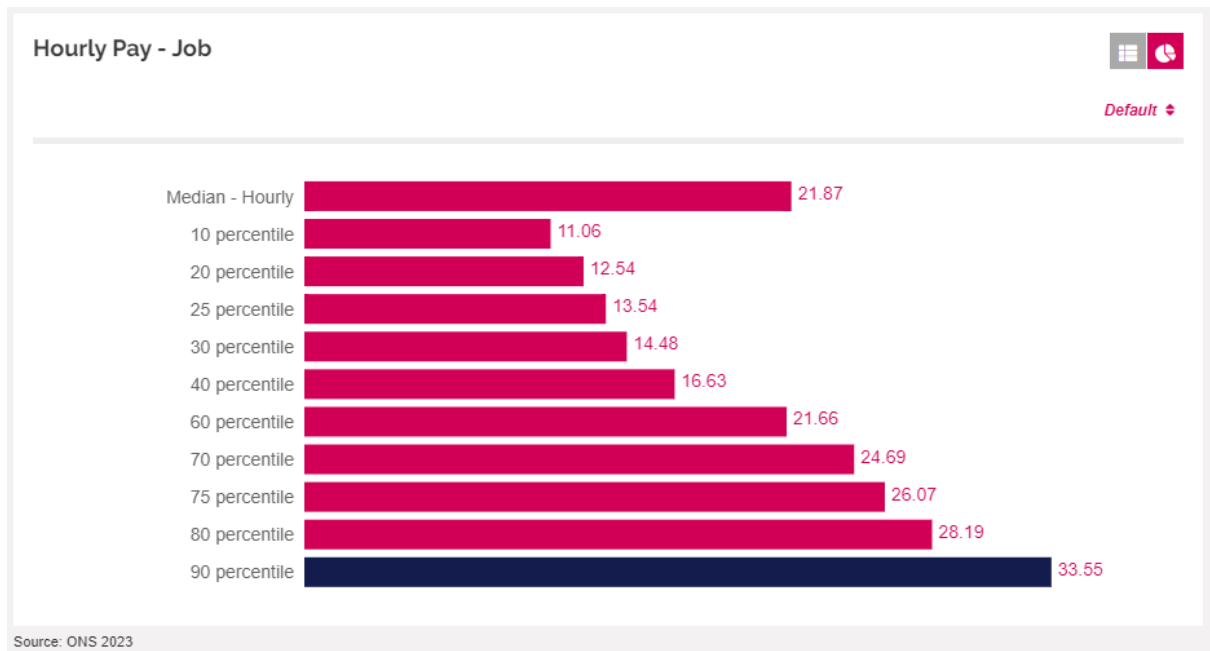
- 4.2.5 [Glasgow's Local Child Poverty Action Report 2021/22](#) and its associated report [Child Poverty: Understanding the Impact of the Covid-19 Pandemic](#) by the Centre for Civic Innovation uses a wider age bracket than 0 to 14 years to describe 'children' but their finding indicates that 27,995 children, accounting for at least 26% of children in Glasgow, were living in relative poverty at November 2021. The Council have now published their [Child Poverty in Glasgow Report 2023](#) that and a [dashboard](#) that provides an update on the situation.

Social Capital: Gender Pay Gap

- 4.2.6 The pay gap between male full-time workers and female full-time workers in the city remains pronounced demonstrating embedded inequity. At 2022, the average male full-time weekly wage was £731.30 compared to £624.60 for female full-time workers. This is around £106 a week less for female full-time workers or 15% lower in comparison to male full-time workers.
- 4.2.7 In both cases male and female full-time workers are being paid more, on average, than elsewhere in Scotland (£53 more per week for male full-time workers and £20 more for female full-time workers) and the UK (£45 more per week for male full-time workers and £40 more for female full-time workers).
- 4.2.8 The data also suggests that female full-time workers are working 36.9 hours per week while male full-time workers are working around 38.8 hours per week.
- 4.2.9 A higher proportion of males (9.1%) were in self-employment than females (3.3%) and compare with the Scotland-wide (5.7%) and UK (6.7%) positions is a low source of employment for female residents in Glasgow indicating the potential exclusion of a significant proportion of innovative entrepreneurs from the market in Glasgow.

Produced and Financial Capital: earning the real living wage

- 4.2.10 Poverty is a recognised concern in Glasgow and, in line with Scotland overall, between 10 and 20% of the workforce fail to receive a real living wage. The City has committed to a [real living wage of £12 per hour](#) from 1st April 2024.



Source: ONS 2023, accessed from [Invest Glasgow website](#)

Workless Households

- 4.2.11 At December 2022, the Office of National Statistics reported that there were 52,200 workless households in Glasgow accounting for 20% of all households. This is higher than the Scotland (17.8%) and UK (13.9%) proportions.
- 4.2.12 While higher than the national average, 20.6% is the lowest proportion of workless households over the past 20 years and 52,200 is a decrease of 17% on the peak of 71,300 at 2009.

Out of Work Benefits

- 4.2.13 At October 2023 there were 20,425 out-of-work claimants accounting for around 4.6% of the labour force. In the past 10 years this figure has ranged from 38,205 people in August 2020 (at the height of the pandemic) to 13,190 in October 2017.
- 4.2.14 16% (3,250) were aged 16 to 24, 62% (12,905) were aged 25 to 49 and 21% (4,270) were over 50 years of age. A higher proportion of 25- to 49-year-olds and older the 50-year-olds were claiming out-of-work benefits than the Scottish and UK proportions.
- 4.2.15 **Key Issue:** Future policy interventions at a local level would benefit from reference to the [Wellbeing Economy Monitoring](#) indicators as a measure of success in order to align with national goals.

National Planning Framework 4 (February 2023)

- 4.2.16 The suite of national economic strategies and the indicative Regional Spatial Strategy for the Glasgow City Region are incorporated into the [National Planning Framework 4](#) (February 2023).
- 4.2.17 It committed Glasgow to the allocation of sufficient land for business and industry, taking into account 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.

Glasgow Strategies

- 4.2.18 The [Glasgow Strategic Plan 2022 to 2027](#) identifies four Grand Challenges including to reduce poverty and inequality in our communities; increase opportunity and prosperity for all our citizens; fight the climate emergency in a just transition to net zero; and enable staff to deliver essential services in a sustainable, innovative and efficient way for our communities.
- 4.2.19 It also commits Glasgow to:
- Work with the Scottish Government to deliver the Clyde Mission.
 - Work to expand Glasgow's thriving tech sector and support sectors such as cultural, design and education start-ups.
 - Ensure that the growth and success of Glasgow's film and TV industry contributes to the local economy with local business, training, and employment opportunities.
 - Implement the [City Centre Recovery Plan](#) and develop a new [City Centre Strategy](#)
 - Support Business Improvement Districts.
 - Support... reuse/repair hubs and establish a Circular Economy District.
 - Supports more Glasgow companies exporting goods and services.
 - Grow the number of Small and Medium Enterprises and microbusinesses alongside co-operative and social enterprises.
 - Invest in more council-owned renewable energy generation, including solar and wind energy, and support the development of green hydrogen.
 - Continue work to reduce Vacant and Derelict Land, prioritising brownfield sites for development and ensuring adequate protection for Green Belt and designated Open Space.

4.2.20 The [Glasgow Economic Strategy 2022 to 2030](#) identifies three further grand challenges facing Glasgow's economy, namely: **enhancing productivity**, the **climate emergency**, and **inclusive growth**. It sets out nine themes crucial to addressing the challenges. They are:

- Developing a green economy
- Growing our economy
- Inward Investment and Internationalisation
- Innovation
- City Investment and Financing
- Employment and Skills
- A fairer Glasgow
- Infrastructure and Place
- Supporting Key City Assets

4.2.21 [Glasgow's Investment Strategy 2023-2030 \(new version\)](#) supports the economic strategy and identifies that 6 clusters are emerging in [Health-tech](#), [Fintech](#), [Green Economy](#), [Digital and creative economy](#), [Advanced manufacturing](#) and the [Space industry](#).

4.2.22 **Key Issue:** Future policy interventions at a local level should demonstrate how they positively contribute to one or all of the Grand Challenges including consideration of the land requirements of the 6 sectoral clusters identified in the Investment Strategy.

4.2.23 [Glasgow's Capital Investment Programme 2023](#) notes the ongoing difficulties of high inflation within the construction sector, shortages within global supply chains of key components, raw materials and skilled labour and increased energy costs. It notes the completion and opening of the City Building Training College within Atlas Industrial Estate in Springburn and sets out priorities for the future, namely: to complete enabling works at Queenslie Industrial Estate to redevelop the site into a new waste and recycling hub.

4.2.24 [City Property Group Business Plan 2023 to 2028](#) describes the relationship of the arms-length company to Glasgow City Council and sets out its goals for the period 2023 to 2028. This includes investigating opportunities for battery storage and developing a masterplan for Blochairn where, at March 2024, they were marketing [two sites at Blochairn Market](#).

4.3 Glasgow Industry/Office Market Context

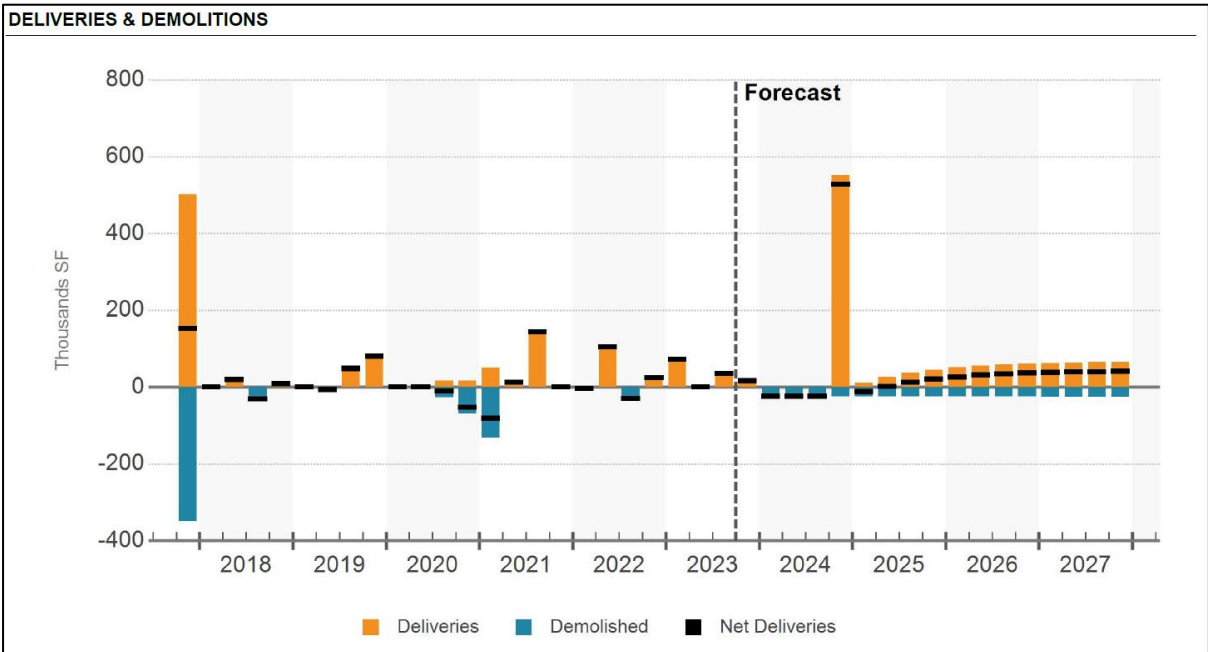
Industrial Uses

The Council, via Invest Glasgow, prepared an **Industrial Submarket Report for Glasgow** in December 2023 using Co-Star data. It highlighted vacancy rates (4.2%) were lower than the five-year average (4.5%).

KEY INDICATORS		
Current Quarter	GIA	Vacancy Rate
Logistics	21,925,102	3.3%
Specialised Industrial	7,382,973	8.7%
Light Industrial	5,001,464	1.3%
Submarket	34,309,539	4.2%

Source: GCC/Co-Star (Dec 2023) Industrial Submarket Report.

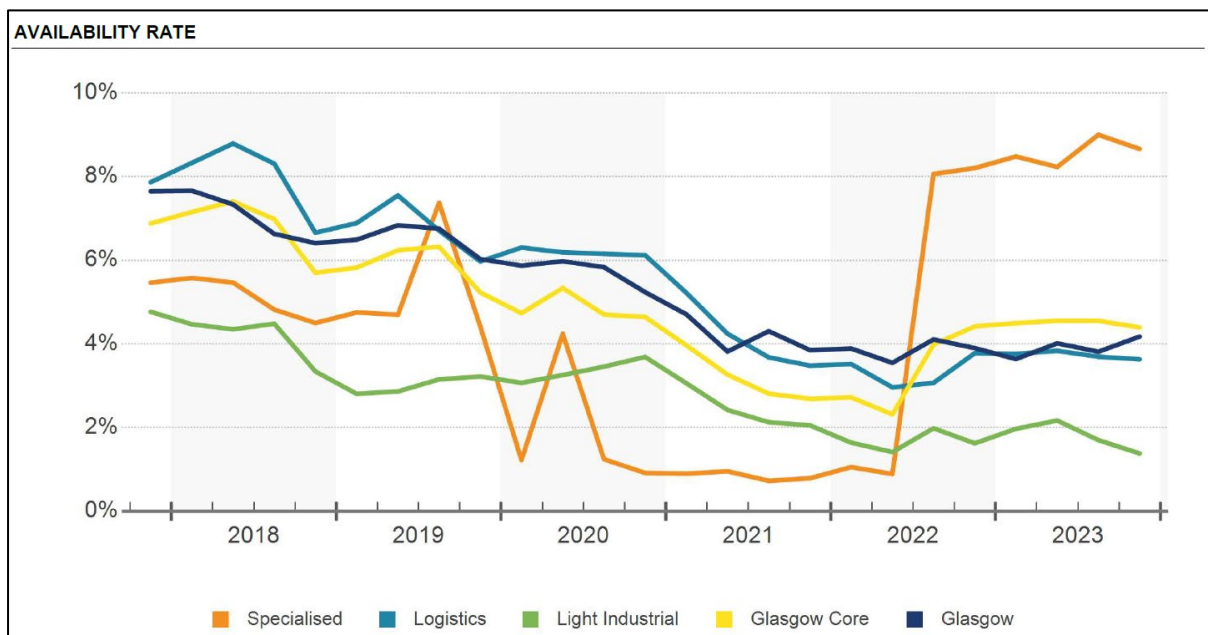
4.3.1 It forecast that there would be a large spike in delivery at Q4 of 2024 followed by net increases quarter-on-quarter.



Source: GCC/Co-Star (Dec 2023) Industrial Submarket Report

4.3.2 The report highlighted a lack of options for occupiers seeking upwards of 25,000 square feet with only 9 warehouses capable of accommodating such a requirement in late 2023, most of which were built in the 1980s. It highlighted that mid-box availability remains restricted at around 5% (compared with 6% pre-pandemic).

4.3.3 The graph below visualises the reduction in availability rates from 2018 to 2023. The impact of the closure of McVities is evident in an outsized increase in specialised floorspace mid-2022 otherwise there is a relative lack of availability of floorspace compared with the position in 2018.



Source: GCC/Co-Star (Dec 2023) Industrial Submarket Report

4.3.4 The report also highlighted the dominance of build-to-suit developments rather than speculative developments including Harper Collins at Robroyston, Amazon at Glasgow Business Park and DHL at Clyde Gateway East – all in the east of the city.

4.3.5 Colliers (Feb 2024) [Industrial and Logistics Market Pulse](#) indicates that demand for industrial space continues to come from a broad spectrum of sectors such as food and drink, engineering, service sectors, manufacturing, retail and logistics.

- 4.3.6 It also notes that build cost inflation and softening investment yields have meant that most speculative developments have been paused. Occupiers needing ready-to-occupy larger units will find very few options. The outlook is for there to continue to be a shortage of warehousing of all sizes and grades push rents up⁶⁹.
- 4.3.7 **Key Issue:** The bespoke analysis identifies low availability of industrial buildings in the city generally, and very low availability of units over 25,000 sq ft. It identifies that despite this market there has been a lack of speculative building, programmed or underway, to increase stock and provide choice and flexibility in the prospective occupiers.

Offices

- 4.3.8 Savills (Jan 2024) [Market in Minutes: Glasgow Occupational Office Data Q4 2023](#) reports that, in the fourth quarter of 2023, take-up of office floorspace in Glasgow equated to 77,000 sq ft over 23 deals done. 30% of deals were for Grade A buildings and Grade A take-up totalled 46,000 sq ft, therefore consisting 59% of the total. This was 122% higher than the total Grade A take-up in Q4 2022.
- 4.3.9 Overall, 2023 total take-up equated to 310,000 sq ft which was 24% down on the previous year. Grade A take-up amounted to 135,000 sq ft of this, which was only 7% down on 2022.
- 4.3.10 Savills also reported that the total availability in Glasgow City Centre amounted to 1.6m sq ft at the end of Q4 2023, a 2% increase on the same period in 2022. In their view secondary space continues to dominate supply, with just over 1m sq ft available for Grade B/C space, equating to 63% of the total.
- 4.3.11 Grade A and Prime supply totalled 586,000 sq ft; 37% of the total. The vacancy rate in Q4 for Grade A buildings has decreased to 2.5%, down from 3% in Q3.
- 4.3.12 Avison Young (Feb 2024) [The Big Nine Quarterly update of regional office activity Q4 2023 – Glasgow](#) adds that “*premium quality space remains undersupplied, with the grade A availability rate at 3.2%*” and a further Savills (Jan 2024) [Glasgow Office Spotlight](#) report, highlights that that “*Glasgow has one of the lowest prime office supply levels in the Big 6 markets*”. It estimates that the City has “*just six months’ worth of prime supply in the market based on average demand... the choice for occupiers in the city centre remains critically low.*”
- 4.3.13 Knight Frank (Jan 2024) [Glasgow UK Cities 2024 Insights](#) reports that “*the development pipeline is tight*” and that “*speculative space due to complete in 2024 is comprised of three buildings, all undergoing comprehensive refurbishments. This highlights developer preference toward less carbon intensive projects and the relatively higher build costs for new buildings.*”

4.3.14 **Key Issue:** demand in the market is for best-in-class office space, and demand is outweighing current supply.

Laboratories

4.3.15 The last few years have seen a rise in R&D and life sciences clusters, and it is widely acknowledged that there is a shortage of lab space across the UK⁷⁰. Ryden was commissioned by Invest Glasgow to investigate the market for laboratories (labs) in the Glasgow City Region. The investigation responded to Action 6 is of the [Glasgow Investment Strategy](#) (September 2023):

*“Invest Glasgow will work closely with internal and external stakeholders, including the Universities and innovation districts, to help deliver the new investment zone, **tackle the challenges of shortage of industrial space, in particular lab space to maximise the emerging specialisms in life sciences, and promote investible propositions to take to market.**”*

4.3.16 The Ryden (Jan 2024) Glasgow City Region: Laboratories A market investigation report highlights that Glasgow is recognised for research, innovation and start-ups, but that businesses are currently reliant on a static and ageing stock to accommodate scale-up, relocation and attract mobile companies. It highlighted that labs are expensive to create and there is typically a development lag of around 2-3 years.

4.3.17 The report also highlighted that the estimated stock of labs extends to 45 buildings. Two-thirds are smaller than 5,000 square feet and virtually no lab space is being marketed. Medium-sized moves and scale-ups appear to be a particular constraint in the Region’s lab market – many businesses will not be large enough for their own building so will require provision of multi-occupied space to lease.

⁶⁹ Colliers (accessed March 2024) [Industrial and Logistics Rent Map](#)

⁷⁰ Savills (Jan 2024) [Why it’s time for new permitted development rights to unlock UK R&D and lab space](#)

- 4.3.18 Savills note that companies that a mix of workspace and flexibility for Glasgow's growing businesses is essential⁷¹. At the same time, this desire to create right-sized space for companies is happening when the industry recognises the need to repurpose buildings that are already standing, where possible. Together these drivers present an exciting proposition to reimagine Glasgow's city centre with the first signs of this underway through projects such as the Met Tower.
- 4.3.19 **Key Issue:** The current lab stock is at capacity and will not be able to accommodate further spinouts or enable an acceleration of innovation growth and expansion without identification of new opportunities.
- 4.3.20 Commitments have been made by the educational institutions in the City to support and expand the innovation sector⁷², including the need for lab facilities for start-ups to spin-out to.

Data Centres⁷³

- 4.3.21 Scotland can generate significant new economic growth from data storage, management and innovation. The progress of artificial intelligence (AI) and machine learning is fuelling a wave of transformative shifts in data centre design, site selection, and investment strategies⁷⁴.
- 4.3.22 According to a report by Scottish Futures Trust/Host in Scotland (May 2023) Shortlist for Data Centre Site Development⁷⁵, there will be opportunities in urban locations like Glasgow for facilities at the 2-5MW range, alternatively referred to as regional edge sites. Demand for data centres in urban locations will be driven by two sources: enterprise demand for cloud and managed services which will be based around areas with relatively high populations and commercial activities and 'access to eyeballs' for edge-related latency-based applications like the Internet of Things, Augmented/Virtual Reality, Artificial Intelligence and 5G networks.

⁷¹ Savills (Nov 2022) [Glasgow can support its growing talent pool by providing incubator space and space fit for purpose](#)

⁷² University of Glasgow (Nov 2023) [University of Glasgow officially unveils 6G laboratory](#); (March 2024) [UofG launches new computing science innovation lab](#); University of Strathclyde (Dec2023) [Strathclyde partners in Financial Regulation Innovation Lab project](#);

⁷³ Scottish Government (March 2021) [Green datacentres and digital connectivity: vision and action plan for Scotland](#)

⁷⁴ JLL (Jan 2024) [Data Centers 2024 Global Outlook](#)

⁷⁵ Report available on request from james.king@scottishfuturestrust.org.uk; andrea.mason@scottishfuturestrust.org.uk; jonathan.murray@scottishfuturestrust.org.uk

- 4.3.23 The target occupiers will be wholesale and retail colocation operators providing data centre services to the hyperscale cloud and managed services market. Note that it is highly unlikely that these parties would build themselves, but contract directly through third-party data centre operators or connectivity-focused players. In addition, the target market would also include edge specialists.
- 4.3.24 Site demands identified for data centres include abundant energy, low cost and direct access to renewables, access to multiple connectivity providers including tier 1 carriers, full fibre providers and alternative networks. Broadly summarised as Position, Plot, Protection, Power, Ping, Programme and Proposition the focus on quality, not quantity in Glasgow is advised.

Material Recovery Facilities (MRF)⁷⁶

- 4.3.25 Glasgow City Council has received the largest award to date from the Recycling Improvement Fund award: more than £21 million for a new MRF at Queenslie Industrial Estate, set to open in 2026.
- 4.3.26 The City already hosts the Glasgow Recycling and Renewable Energy Centre (GRREC). This is a state-of-the-art residual waste treatment facility at Polmadie which was designed and is operated in partnership between Glasgow City Council and Viridor (Glasgow) Ltd. The facility became fully operational on 28th January 2019.
- 4.3.27 Other private sector demand for material recovery facilities have been noted⁷⁷ and it is anticipated further developments will be required in order to enable the transition from linear supply chains to a circular economy.
- 4.3.28 In particular, there is demand for a textile supply and return system at scale and the city could potentially provide the blueprint for a 200,000 sq ft automated textile sorting and pre-processing network comprising a MRF and mechanical sorting facility to deal with 25 to 50 tonnes textiles a year, associated raw and finished distribution centres, links to the freight hub network, and access to around 340kw renewable energy production and available water capacity.

⁷⁶ Zero Waste Scotland (accessed March 2024) [Recycling improvements in Glasgow](#)

⁷⁷ SEPA (Dec 2022) [Queenslie Healthcare Waste Treatment and Transfer Site](#)

Film Studios⁷⁸

- 4.3.29 Scotland's screen sector has proven to be particularly resilient, and a recent [Screen Scotland report](#) highlights significant growth, particularly across inward investment film and High-End TV (HETV) production, increasing by 110%, from £165.3 million in 2019 to £347.4 million in 2021. In Glasgow that has seen the creation of new film studio space⁷⁹, including at Kelvin Hall⁸⁰, at Govan⁸¹ and the arrival of Channel 4⁸².
- 4.3.30 The Glasgow College Region (which also includes East Dunbartonshire and East Renfrewshire) accounted for 32,700 jobs at 2023. Across Scotland the number of jobs is projected to grow by 4% to 2026 and then a further 3% to 2033.
- 4.3.31 [Knight Frank report](#) in September 2023 paint a more conservative outlook in terms of large-scale new studios. It identifies “development activity concentrated in smaller facilities, conversions, and expansions at existing studio sites”.
- 4.3.32 The report further notes that different segments of the film and TV industry require different types of studio space, with differing building design requirements:

Traditional TV studios require ‘shiny floors’ with levelled resin to facilitate the seamless tracking of cameras and minimise sound transmission. Additional power supplies are also essential to avoid interruptions for live broadcasts. Adjoining spaces such as post-production office space and dressing rooms are also increasingly desired features, particularly for longer-running productions.

Studios that accommodate filming in front of an audience may need additional provisions such as extra ventilation and cooling, additional space for seating, and front-of-house services such as a reception area and bathroom facilities.

⁷⁸ Skills Development Scotland (Oct 2023) [Sectoral Skills Assessment Creative Industries](#)

⁷⁹ Screen Scotland (Sept 2021) [Scotland's Film and Television Studio and Buildspace \(under 10k sq ft\)](#); Knight Frank (Sept 2022) [Film & TV Studios - Spotlight on Scotland](#)

⁸⁰ Screen Scotland (Sept 2022) [BBC Studioworks launches new TV Studio in Glasgow's Kelvin Hall](#)

⁸¹ FilmCityGlasgow (accessed March 2024) [Film City Glasgow](#)

⁸² The Glasgow Guardian (Nov 2019) [Channel 4 open new Creative Hub in Glasgow](#)

Purpose-built film and HETV studios, require building heights of 35-50ft are needed to house large sets, lighting and rigging, alongside a significantly larger lot size to account for at least double the floor space and outdoor areas for production support vehicles. Pre-production rather than post-production space is required, and sound stages are designed to allow for better manoeuvrability of the cast and crew.

Logistics

- 4.3.33 The logistics market in Glasgow comprises three main sources, second-hand space, build-to-suit development and speculative development. In 2023, prime big box rent was £8.75 per square foot per annum – around 60% growth since 2016. Scotland had the smallest “ready-to-occupy” supply and the smallest pipeline of any UK region.⁸³
- 4.3.34 The British Property Federation (Jan 2022) [Levelling up the Logic of Logistics](#) makes the case for the economic, social and environmental benefits of the industrial & logistics sector. It highlights a projected 29% productivity increase between 2025 and 2039 and the potential for the sector to contribute towards net zero using innovative design, materials and processes.
- 4.3.35 A growing locational demand for urban sites for logistics operators has recently been identified by analysis of a [CBRE survey](#). It indicated that operators have identified urban expansion as a high priority. CBRE note that “*distribution is traditionally land hungry, but more efficient multi-storey warehousing models have been trialled to address the lack of space closer to city centres*”. Designs incorporating mixed use distribution and residential solutions (beds & sheds) are already in existence, and subterranean warehousing allows high bay warehousing without the visual impact. Likewise, lower eaves heights, and positioning of large warehouses away from boundaries, can reduce the visual impact of these developments⁸⁴.

Self-Storage

- 4.3.36 According to a [2023 survey by CBRE](#), self-storage demand continues to grow across Europe. Demand remains strongest for larger businesses, but unmanned operations had grown in popularity in the previous year. Operators indicated a preference to share developments with office, over retail and either over industrial space or co-working⁸⁵.

⁸³ CBRE (Feb 2024) [UK Logistics Q4 2023](#)

⁸⁴ CBRE (July 2023) European [Logistics Occupier Survey 2023](#)

⁸⁵ CBRE (Oct 2023) [European Self Storage Industry Report 2023](#)

5 Assessment of Industrial and Business Locations

5.1 Industry and Business Location Audit

5.1.1 The business and industry land audit sought to provide an update on the performance of the 83 [Economic Development Areas identified in the City Development Plan](#). The aim was to present a broad picture of the performance of each location to assess against the policy aims and interventions in place for it and to inform future policy formation and plan-making.

5.1.2 As per previous audits, headline data from the Scottish Assessors Association (SAA) was collated in terms of floorspace and vacancy. Basic site information and development activity was also sought from the [annual monitoring statements](#), [Industry and Business Land Supply audits](#) and planning applications, and an assessment of environmental factors ascertained from a site visit and feedback from stakeholders including City Property and the Spatial Planning Teams.

5.1.3 This report takes as a starting point the four distinct categories of Economic Development Area set out in the City Development Plan, namely:

8 Strategic Economic Investment Locations (SEILs).

8 Areas of City-Wide Economic Importance (ACWEIs).

10 Economic Development Areas around health or university campus'; and

14 Economic Development Areas with the Potential for Managed Change

5.1.4 It analyses the impact of each designation on the relevant industrial and business locations and then provides a summary by ward.

5.1.5 There were also four additional actions taken on a case-by-case basis, first to identify any emerging locations, second to review previous locations, third to identify any emerging sites (not identified in the industrial and business land supply) and fourthly to identify areas within industrial locations where people live – for example those co-located with businesses.

Methodology

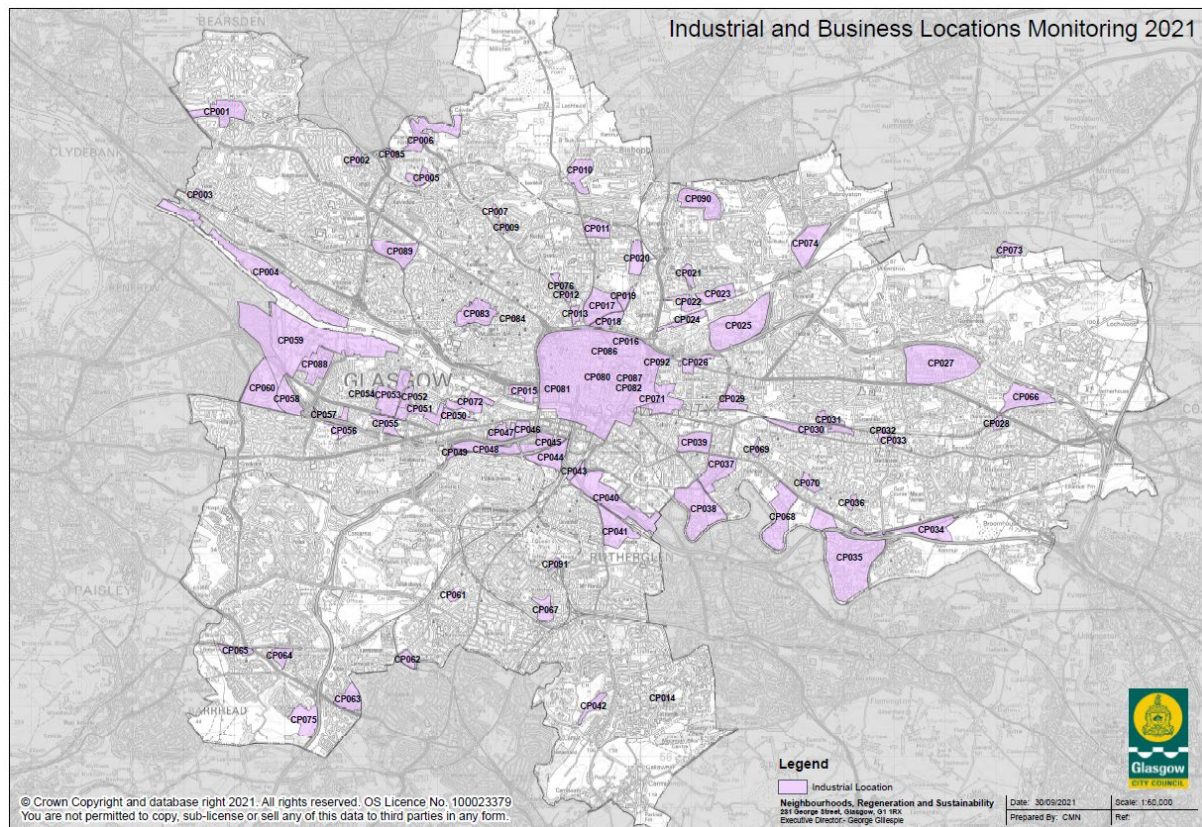
5.1.6 Data from the Scottish Assessor Association (SAA) was retrieved for the 1 April 2023 and attributed to industrial and business locations (see Map 1) using their grid references.

5.1.7 The data collated included the number of businesses, the SAA's description of the type of use, floorspace, details of significant occupiers, and vacancy. Additional information about the size of the area audited and the ward the location was (mainly) in was also accessed using GIS tools.

5.1.8 A site visit was undertaken in order to provide a broad assessment of whether the **General Environment** appeared as 'Good', 'Mixed' or had 'Notable Issues'. The following **Specific Environment Factors** were used to assess the General Environment:

- | | |
|--------------------|----------------------------------|
| Roads/Pavements | On-Street Parking |
| Street Lighting | Off-Street Parking |
| Boundary Treatment | Circulation Space |
| Yard Space | Security/CCTV |
| Tipping | Vandalism i.e., notable graffiti |

Map 1: Historic Industrial Monitoring Boundaries

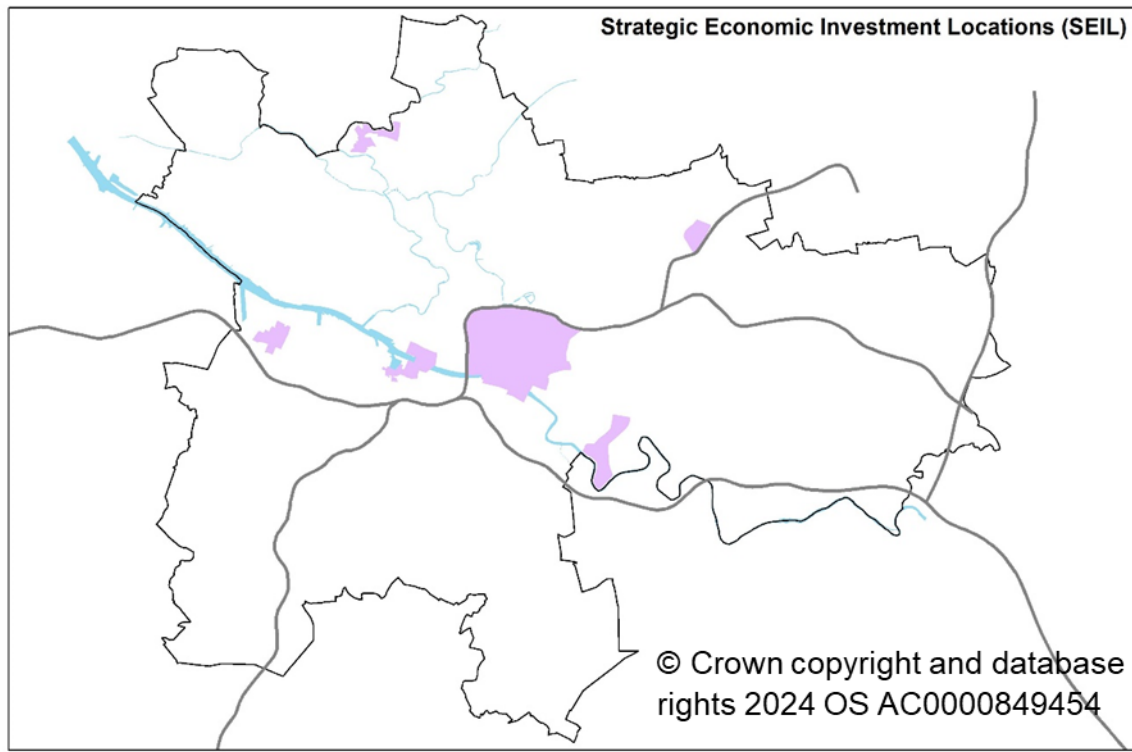


Limitations

- 5.1.9 The scale and number of Economic Development Areas made contacting individual businesses impractical. In order to better target future engagement, the site visit instead sought to summarise whether each location appeared to be 'Managed' as a single entity and collect the owner/landlord details. It also sought to identify whether *elements* of the EDA were managed, for example, as industrial estates *within* the wider Economic Development Area and summarised these as 'Partly' noting again the owner/landowner details. Clusters of independent businesses not controlled by a single owner/landlord/controlling entity were summarised as 'Unmanaged' but significant occupiers were recorded to provide potential future engagement opportunities.
- 5.1.10 Other noteworthy limitations to the process included that it was sometimes difficult to align the site visit observations on vacancy with the SAA's data recording of vacancy. For example, the former [McVities Factory in Tollcross](#) was visibly closed at the site visit but had not been Assessed as 'vacant' at 31 March 2023 by the Assessor. It is not clear why that might be, but it could reflect the difference between a site not being operational and a site not paying rates. In this case, it would appear that the site is not (yet) available to the market – and by this definition it is not 'vacant'.
- 5.1.11 It is acknowledged therefore that the retrieved data does not always identify the cessation of a former uses in the way that it might have been expected to. On balance, and broadly in line with previous audits, it was decided to accept the Scottish Assessor Association's position on vacancy for what it was and to acknowledge that sometimes this would underplay buildings that are not in use but would better reflect sites that are available.
- 5.1.12 A further limitation noted was that some Assessor records for buildings did not include floorspace. This is an historic issue with the data and, as with previous audits, the floorspace from the previous audit was carried forward. Duplicate records were also identified and removed.
- 5.1.13 Another limitation noted was that site visits could only be expected to provide a snapshot of the situation at the time and that may not represent a typical situation – particularly with regards to transitory issues such as parking.

5.2 Strategic Economic Investment Locations (SEIL)

Map1: Strategic Economic Investment Locations (SEILs)



- 5.2.1 **Strategic Economic Investment Locations (SEIL)** were identified as locations that would appeal to key sectors and whose development would have a potentially transformative impact on the *region*. They had development support from partners such as Scottish Enterprise and Clyde Gateway and were agreed with Glasgow City Region Local Authority partners.
- 5.2.2 Eight were identified in Clydeplan including two nested within the City Centre Strategic Economic Investment Location – meaning there were 6 distinct SEIL geographies.

Area name	Clydeplan Key Sectors/Operators
Glasgow City Centre <i>(incorporating the IFSD and ITREZ SEILs)</i>	Business and Financial services; Green Technologies; Higher and Further education; Visitor Economy
International Financial Service District (IFSD)	Business and Financial services (Barclays, JP Morgan, Morgan Stanley, KPMG, Scottish Government, DWP, Student Loans Company, Santander, HM Revenue and Customs, MOD, BT)
International Technology and Renewable Energy Zone (ITREZ)	Green/Renewable Technologies, Glasgow City Innovation District (University of Strathclyde, Rolls Royce, Weir Group, Babcock)
Creative Clyde Enterprise Area <i>(incorporating SEC/Hydro and Pacific Quay)</i>	Creative and Digital Industries (Scottish Enterprise, BBC, STV, Glasgow School of Art); visitor economy (Science Centre, IMAX)
Queen Elizabeth University Hospital Glasgow	Life Sciences/research and development (NHS, University of Glasgow, Glasgow Riverside Innovation District)
West of Scotland Science (WOSSP)	Life Sciences/Green Technologies (Speyroc, Scottish Enterprise, University of Glasgow, M Squared, Merck, Sartorius Stedim BioOutsource)
Clyde Gateway	Business and Financial services; (Clyde Gateway URC, Police Scotland, Spectrum Properties), Distribution and Logistics
Robroyston	Business and Financial services (Scottish Enterprise, Harper Collins, Morrison Construction, Robertson Construction, T squared)

5.2.3 There was 11.36 hectares of land available in these locations at 2023 across 10 sites although not all SEIL locations had an identified Industrial and Business Land Supply site.

Area name	Sites Available	Area Available	Managed	General environment
Glasgow City Centre	n/a	n/a	No	Mixed
International Financial Service District (IFSD)	n/a	n/a	Partly	Good
International Technology and Renewable Energy Zone (ITREZ)	n/a	n/a	Yes	Good
Pacific Quay	2	3.63 ha	Partly	Good
Queen Elizabeth University Hospital Glasgow	n/a	n/a	Yes	Good
West of Scotland Science	3	0.86 ha	Yes	Good
Clyde Gateway	4	4.35 ha	Yes	Good
Robroyston	1	2.52 ha	Yes	Good
SEILs total	10	11.36 ha		

City Centre Strategic Economic Investment Location

- 5.2.4 The City Centre stands apart as the main driver of the Scottish Economy, its [performance](#) and the range and complexity of policy and project interventions being applied are not dealt with in detail by this section.
- 5.2.5 Recent relevant commentary is included in the May 2022 report by Ryden for Glasgow Chamber of Commerce called [Glasgow City Centre Property Market Recovery and Support Interventions](#). This led to the publication of a collaborative [Glasgow City Centre Recovery Plan 2022-2024](#) and a more detailed examination by Stantec (Aug 2023) [A vision + plan for the golden z \(summary and appendices\)](#) which informed an ambitious new [City Centre Strategy](#).
- 5.2.6 The Stantec (Aug 2023) report included that the “*Number of new office lettings in Glasgow in the first three quarters of 2022 was at the highest level since records began in 2013*”, which, in combination with the monitoring report findings that little to no new office space had been created over that period, presents a complex recent picture of office space supply and demand.
- 5.2.7 The [City Centre Strategic Development Framework](#) is of relevance in terms of shaping the long term aims for development of the area. It sets out three priorities including accelerated transformation, increased activity, and diversity. It provides a framework within which multi-sectoral policies, plans and projects can be aligned. In this context it may be appropriate to identify the city centre apart from other regionally important industrial and business locations in future Local Development Plans or be more reflective of placed-based proposals such as the [District Regeneration Frameworks](#) that set out bespoke visions for districts within the city centre.
- 5.2.8 The **IFSD** and **ITREZ** Strategic Economic Investment Location designation recognised the emerging clusters of financial and technology businesses respectively with an intention to highlight this to future investors. The recent [Barclays development](#) south of the river Clyde suggests that this, along with other efforts, has been successful. The ITREZ location has emerged as the core of a much wider [Glasgow City Innovation District \(GCID\)](#) being shaped by the University of Strathclyde. Cleared brownfield land remains available in these locations along Broomielaw and adjacent to the TEC building.

- 5.2.9 Also within the City Centre Strategic Economic Investment Location are the [Glasgow Caledonian University campus](#) in the north part of the city centre, south east of which is the [University of Strathclyde campus](#) and east of that is the [Royal Infirmary Hospital campus](#). While not recognised as Strategic Economic Investment Locations in the City Development Plan their role as anchors and engines of the economy are recognised for the first time by a Local Development Plan and they are identified as Economic Development Areas around Health or University Campuses.
- 5.2.10 Development of the [Glasgow Caledonian University](#) has proceeded broadly in line with the [2010 Campus Masterplan](#). The Glasgow campus now contains 13 buildings situated within a defined city centre boundary measuring 59 hectares. All of the buildings are owned in their entirety by the University while their estate also includes the purpose-built 660 bed student residence at Caledonian Court.
- 5.2.11 The University is currently [developing a new Masterplan](#) to reinforce the Civic status of the University. The last major infrastructure investment saw the completion of the Heart of the Campus project in 2016 which was a major milestone and a significant contributor towards addressing the previous Masterplan objectives. Current rolling infrastructure projects include the transformation and modernisation of teaching accommodation and investing in the refurbishment of the student residences.
- 5.2.12 The [University of Strathclyde](#) anticipate that by 2025 they will have invested more than £1 billion on their [continuing transformation of their campus](#). This includes four UK Catapult Centres, four Scottish Innovation Centres and being the host of the UK's only [Fraunhofer Centre for applied photonics](#)
- 5.2.13 The **Glasgow Royal Infirmary** was undergoing ward [refurbishment works](#) at March 2024, one of only two projects underway across the Greater Glasgow and Clyde health board area.

- 5.2.14 The **Townhead/Cowcaddens Economic Development Area** is located in the north and northeast of the City Centre covering two distinct geographies either side of Glasgow Caledonian University. The recently completed Sighthill Bridge lands in the Townhead element of the EDA.
- 5.2.15 The [City Centre SDF](#) (May 2021) states that Townhead and Cowcaddens are traffic dominated areas with few facilities and a lack of investment in the public environment. It acknowledges the character of the industrial/ business areas have been impacted by a cluster of new purpose-built student accommodation developments. It commits to a masterplan of North Townhead, Dobbies Loan and Hanover.
- 5.2.16 The [Townhead District Regeneration Framework](#) (April 2023) identifies that Townhead can develop a new productive, creative economic hub for the north of the City Centre. It ascribes a strong relationship between Townhead, Cowcaddens and the educational institutions in the Learning Quarter. For Townhead it envisions a hub for intense and smaller scale/light production and last mile logistics and identifies opportunities for refurbished, as well as new, warehouses, studios, makerspaces and workshops.
- 5.2.17 The [Cowcaddens District Regeneration Framework](#) (May 2023) identifies that the area is currently in flux; characterised by warehousing, back office functions, car showrooms, storage warehousing, vacant and under-occupied spaces. It envisions that Cowcaddens can become a fresh, thriving mixed-use quarter characterised by an exciting mix of new models for urban living and working accommodating new housing, workshops, creative and digital studios, sharing economy, remanufacturing and makers spaces.
- 5.2.18 The **College Business Park/Wellpark Economic Development Area** is located in the east of the city centre covering two distinct geographies (one of which is actually outwith the city centre). The western part (within the city centre boundary) is now commonly known as Collegelands and was subject to a [masterplan](#) in 2005 that has yet to be fully realised. Development to date has included office, hotel, student accommodation and multi-storey car parking. A [planning application](#) for the remaining plot within the EDA boundary had been submitted at March 2024. It was for a mix of uses that includes office space. The eastern element of the EDA is the Tennant's Wellpark Brewery facilities in ward 22.

Other Strategic Economic Investment Locations

5.2.19 Outwith the City Centre SEIL boundary are five other regionally important Strategic Economic Investment Locations.

Queen Elizabeth University Hospital & Creative Clyde/Pacific Quay– Ward 5

5.2.20 The **Queen Elizabeth University Hospital (QEUH)** is operational and now well established. The NHS and the University of Glasgow are invested in the emergence of the [Glasgow Riverside Innovation District](#) (GRID) an emerging location stretching from the **Queen Elizabeth University Hospital**, in Govan, across the river to the **University of Glasgow's Gilmorehill Campus**. The University's Innovation Strategy has identified a future demand for life science spaces which it intends to nurture in Govan including initially at a site in Linthouse (part of the Shieldhall EDA).

5.2.21 The [Govan/Partick Strategic Development Framework](#) is of relevance to QEUH. It sets out an action to promote the development of the Innovation District that supports high value-added industries located between Glasgow University Campus, Central Govan and the QEUH. This includes measures to address market failure, improve connectivity and address place quality.

5.2.22 The [River Clyde Development Corridor Strategic Development Framework](#) is also of relevance to the QEUH location in that it identifies that the surrounding Economic Development Areas at **Shieldhall**, and **South Street** may have a supporting role to play in its growing importance to the city. It states that the Council will continue to review the level of protection applied and will identify areas with the potential to accommodate different uses through a managed process. These EDAs have potential to support the development of a nationally significant cluster of innovation and economic development activity related to the Queen Elizabeth University Hospital.

5.2.23 The potential marketing role of a future development plan in promoting the innovation district (rather than the industrial areas or distinct innovation district anchors like the QEUH) warrants consideration.

- 5.2.24 The Scottish Enterprise-led re-development at the Creative Clyde Enterprise Area was identified as the **Pacific Quay** Economic Development Area in the City Development Plan.
- 5.2.25 Pacific Quay has a well-established media business base with the BBC, STV and Glasgow School of Art all accommodated. Most recent developments have been focussed on introducing more residential uses as exemplified by the development by Cala Homes in the south of the location, interest from [Drum](#) in developing a mixed use proposal adjacent to the water and an unimplemented planning permission for a mixed use development, including homes, on another prominent plot to the north of the Cala development. The [justification for moving away from employment uses](#) presented in that case was the lack of demand in the market for offices outside of the city centre.
- 5.2.26 The [Govan/Partick Strategic Development Framework](#) is of relevance to Pacific Quay. It acknowledges that Pacific Quay (along with the Scottish Exhibition Centre and surrounds) combine to form the most important cluster of events and media accommodation in Scotland. It identifies that the location has potential for significant improvements to public space quality and connections.

West of Scotland Science Park (WOSSP) – Ward 15

- 5.2.27 **The West of Scotland Science Park (WOSSP)** is now a well-established life sciences cluster. The [Glasgow North Strategic Development Framework](#) identifies support for the development of a campus plan (see PR4).
- 5.2.28 During the evidence report engagement process, Icini submitted a report on behalf of Speyroc, who own and manage the western part of the Strategic Economic Investment Location (Kelvin Campus). The report, dated Feb 2022, entitled Vision: West of Scotland Science Park, confirms the park was fully let at February 2022 and sets out the case for further growth of the Kelvin Campus.
- 5.2.29 The report attributes the continuing success of the park to the efforts of the original stakeholders which includes Scottish Enterprise, University of Glasgow and University of Strathclyde. All of these parties remain actively involved in WOSSP in a variety of capacities including landlord, investor and joint venture partner. The report, a follow-up memo and associated campus plan, identify unmet demand, lack of available capacity, limited expansion opportunities and physical constraints.

5.2.30 The landowner reports enquiries from existing businesses to expand and from new businesses to locate. They note that the remaining allocated land is progressing toward development or constrained and to accommodate future demand, WOSSIP would require further growth in the number and scale of facilities either through re-purposing, re-development of existing buildings or via the re-organisation of landscaping including potentially the expansion of the boundary.

Clyde Gateway – Ward 9

5.2.31 The **Clyde Gateway** project is a nationally important regeneration covering parts of ward 9 and other areas east of the city centre. The longstanding project is managed by [Clyde Gateway Urban Regeneration Company](#). It is highlighted in the [National Planning Framework 4](#) for making exceptional progress in transforming communities and overcoming inequality since its inception over a decade ago and is identified as a core component of the Clyde Mission.

5.2.32 The Clyde Gateway Urban Regeneration Company’s scope is wider than just Ward 9 (where the SEIL is designated). It also operates in areas of South Lanarkshire and has been involved in the redevelopment of an area within the **Cambuslang Investment Park Economic Development Area** known as Clyde Gateway East.

5.2.33 At its board meeting of June 2023, it reported the creation of 150,328 square metres of business and industry floorspace since its inception.

KPI 2: Business Floor Space completed

Total as at 31 March 2012	11,651 sqm
Total as at 31 March 2013	30,053 sqm
Total as at 31 March 2014	30,053 sqm
Total as at 31 March 2015	48,262 sqm
Total as at 31 March 2016	59,359 sqm
Total as at 31 March 2017	63,664 sqm
Total as at 31 March 2018	86,521sqm
Total as at 31 March 2019	105,175sqm
Total as at 31 March 2020	115,762sqm
Total as at 31 March 2021	124,396sqm
Total as at 31 March 2022	145,358sqm*
12 MONTH ACTIVITY	4,970sqm (Direct: 0sqm; Indirect: 4,970sqm)
Total as at 31 March 2023	150,328sqm
Business Plan Target over 20 years	400,000 sqm

*[reconciliation](#) exercise – reduced from £151,667 (see section 3.3)

Source: Clyde Gateway URC Board meeting, June 2023

- 5.2.34 Its other activities are wide ranging and have included the [installation of a heat network](#), development of a creative workspace by the conversion of a listed building- "[Eastworks](#)", the recent sale of a unit in the [Clyde Gateway Trade park](#) (in South Lanarkshire), the ongoing development of the new office buildings for Spectrum Property and the progression development at the remaining industrial plots at [Clyde Gateway East](#).
- 5.2.35 The **Clyde Gateway Strategic Economic Investment Location** encompasses two Economic Development Areas in Dalmarnock broadly following the South Dalmarnock Integrated Urban Infrastructure Framework boundary. These locations were called **Nuneaton Street/London Road** (in the north) and **Swanston Street** (in the south) in previous industry and business land audits.
- 5.2.36 **Nuneaton Street/London Road** has changed significantly since the inception of the Clyde Gateway URC. A new road layout and the sports arena have now been developed along its eastern boundary reducing the original size by around half. The remaining industrial and business location is a cluster of industrial buildings, largely developed out and functional including managed areas such as Boden Street Industrial Estate (City Property/Graham and Sibbald) and Nuneaton Industrial Estate (A12 Group). Recent construction of [new units at Dunn Street](#) marketed by Ryden has been completed on the north western corner of the location.
- 5.2.37 The **Swanston Street** element of the Clyde Gateway SEIL is also much reduced from its historic extent with a large triangular area in the east, formerly the site of a power station, removed to reflect the intention to re-develop that area for residential uses (now well underway). In terms of the policy framework, the remaining site is distinguished as two elements by the 2019 review of industry and business locations. The northern, eastern and southern elements (including the sewage works) remained designated as a SEIL while a rectangular element adjacent to the riverbank (but surrounded otherwise by the SEIL) designated as having the potential for managed change.
- 5.2.38 The SEIL element of Swanston Street contained 4 industrial plots in the Industrial and Business Land Supply at 2023 accounting for 4.25 hectares. It includes Strathclyde Business Centre (Spectrum Properties), the Police Headquarters and recently completed industrial properties at [Eastworks](#) (Clyde Gateway/Ryden) and at [French Street](#) (Lapsley McManus) and [Dunn Street](#) (Colliers)
- 5.2.39 The Area with the Potential for Managed Change includes Swanston Street Industrial Estate (Spectrum Properties) and Cotton Street Business Park (Spectrum Properties) as well as some residential live-work yards. There has been no planning application interest in changing the use of the site.

- 5.2.40 The [Inner East Strategic Development Framework](#) is of relevance to Clyde Gateway. It identifies the need to create more pleasant environments in the EDAs and that their mono-use has led to a lack of nighttime activity and fragmentation of the urban fabric.
- 5.2.41 A key action is to encourage the preparation of EDA improvement plans driven by local demand and led by local stakeholders and to produce a bespoke baseline report for the designated Economic Development Areas in the district to develop a thorough understanding of key issues, assets, and development opportunities based on their interconnectedness. It highlights that the next City Development Plan cycle offers an opportunity to make changes to existing EDAs and that a managed change could be introduced which increases accessibility and a mix of uses.
- 5.2.42 It commits EDAs in the Inner East to supporting 20-minute neighbourhoods by enabling people to work close to where they live, via increased local employment opportunities, and improved accessibility, via active travel and public transport, aiding both economic inclusion and climate change mitigation goals.

Robroyston – Ward 17

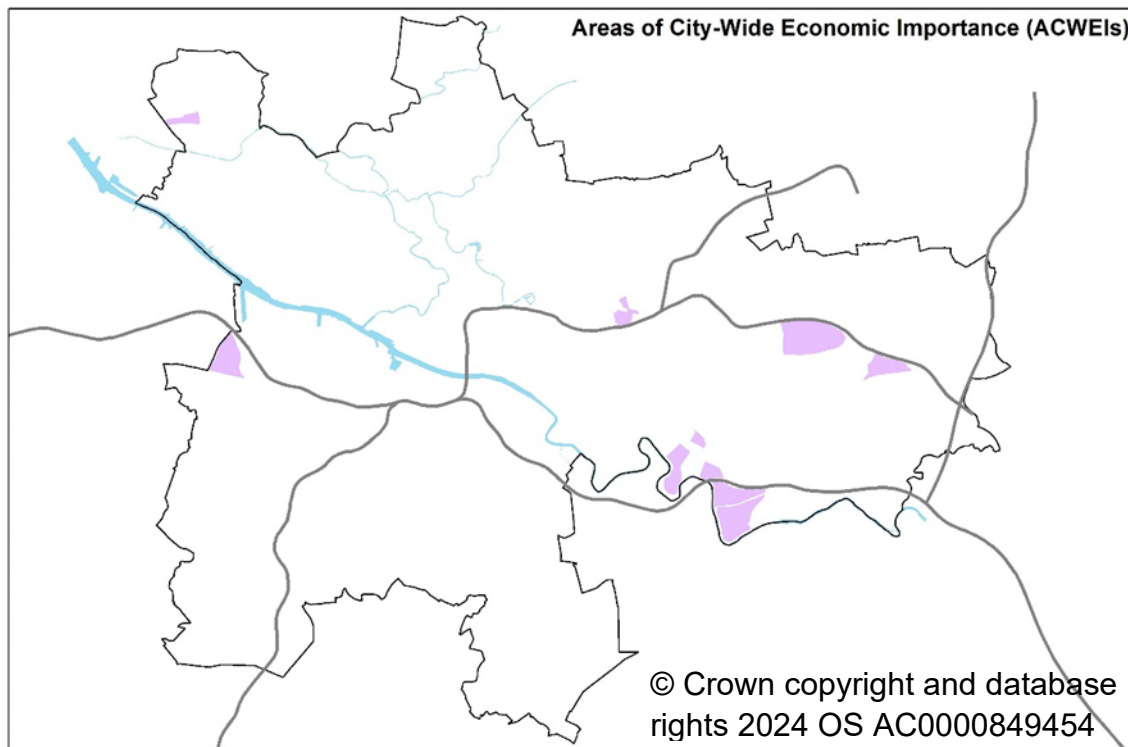
- 5.2.43 The **Robroyston Strategic Economic Investment Location** was initially promoted by Scottish Enterprise with part of the location developed as office pavilions marketed as the Nova Business Park. This part is now marketed by Paradigm and accommodates Morrison Construction and Robertson Homes. The location has also recently attracted Harper Collins to relocate from East Dunbartonshire into a built-to-suit warehouse building of around 45,000 square metres. One site of 2.52 hectares remains available for development.

SEIL Conclusions

- 5.2.44 Broadly the Strategic Economic Investment Locations appear to have performed very well. They are characterised by their dynamism in terms of the amount, scope and scale of change they have experienced compared with many of the other Economic Development Areas. Most have been actively managed, appear well maintained and benefit from attractive public realms. In some instances, their apparent influence beyond the boundaries identified in the City Development Plan was notable.
- 5.2.45 While its not clear that the SEIL differentiation in policy had any meaningful impact on the development of these areas, the marketing role, in setting these locations apart as the key regional sites, may have had a positive impact on investors contributing to their apparent positive performance.
- 5.2.46 The potential marketing role of a future local development plan in promoting the IFSD and ITREZ areas as 'open for business', as well as its potential role in highlighting the opportunities around the University and Health campuses in the city centre, warrants consideration of a policy perhaps coalescing around the Innovation District concept.
- 5.2.47 The emerging Innovation Districts, and Investment Zone, appear well placed to take on the marketing role that could replace the Clydeplan SEIL designations while continuing to recognise the potential of these important locations to growth sectors like life science and technology.
- 5.2.48 **Key Issue:** The challenge for the next Development Plan will be in identifying new opportunities within the Strategic Economic Investment Locations either through repurposing or expansion/amendment of boundaries as well as setting a positive narrative for these locations to contribute to the economic growth of the City.

5.3 Areas of City-Wide Economic Importance (ACWEIs).

Map 2: Areas of City-Wide Economic Importance (ACWEIs)



- 5.3.1 **Areas of City-Wide Economic Importance (ACWEIs)** were identified as locations with established growth sector businesses and/or the potential to support sectors which were expected to be the drivers of the city economy.
- 5.3.2 The designation covered four large industrial estates at Cambuslang Investment Park, Glasgow Business Park, Hillington Industrial Estate and Queenslie Industrial Estates that had a range of sites and opportunities as well as the McVities Bakery single-user location at Tollcross. In addition, three further parts of larger Economic Development Areas were identified at Blochairn, the [wholesale market](#); Drumchapel, Edrington whisky; and at Westhorn/London Road, John Dewar whisky.

Area name	Key Sectors/Operators
Blochairn (market)	Food & Drink (Blochairn Wholesale Market)
Cambuslang Investment Park	Business and financial services (Newsquest, B&Q, Royal Mail, DHL, Batleys)
Drumchapel (west)	Food & Drink (Edrington Whisky)
Glasgow Business Park	Business and financial services (Amazon, DFS, Flanagan Flooring, Tristar Packaging)
Hillington Industrial Estate and Simplified Planning Zone	Business and financial services; low carbon industries via strategic freight hub (John Russell Transport, Graham Builders, Multi Packaging Solutions Ltd)
Queenslie Industrial Estate	Business and financial services; manufacturing (Scotbeef, United Wholesale, GCC Waste Recycling Centre)
Tollcross	Food & Drink (McVities Bakery)
Westhorn/ London Road	Food & Drink (John Dewar whisky)

5.3.3 There was 11.36 hectares of land available in the ACWEI locations at 2023 across 10 sites although not all locations had an identified Industrial and Business Land Supply site.

Area name	Sites Available	Area Available	Managed	General environment
Blochairn (market)	1	0.63 ha	Yes	Good
Cambuslang Investment Park	4	5.34 ha	Yes	Good
Drumchapel (west)	0	0	Yes	Good
Glasgow Business Park	2	4.74 ha	Yes	Good
Hillington Industrial Estate and Simplified Planning Zone	4	5.25 ha	Yes	Good
Queenslie Industrial Estate	6	5.51 ha	Yes	Mixed
Tollcross	0	0	Closed	n/a
Westhorn/ London Road	0	0	Yes	Good
ACWEI total	17	21.47 ha		

Single Users Sites – Blochairn, Drumchapel, Westhorn/London Road and Tollcross

5.3.4 Taking the single user sites first, **Blochairn** wholesale markets play a unique role in the city. Following a fire, the site is now fully re-opened. City Property continue to manage the site and it appears to be operating well with [two ground lease opportunities](#) at the facility being marketed. The two whisky bond sites at Edrington (**Drumchapel**) and John Dewar (**Westhorn/London Road**) appear to be operating well. Opportunities to support food tourism may arise given the global draw of this sector.

5.3.5 The [McVities bakery \(Tollcross\)](#) closed at the end of September 2022 and despite marketing had, at March 2024, not attracted an alternative user. The site covers around 7.22 hectares.

- 5.3.6 The closure of the bakery at Tollcross poses a challenge for next Development Plan in terms of setting out a positive outcome for the site given the age and questionable re-useability of such a bespoke building. Unlike many newer economic development areas, it does not have direct motorway access. Given the scale of the site, a masterplan involving consultation with local people is likely to be beneficial.
- 5.3.7 The other single user sites appear to have continued to operate as successful businesses however should the businesses cease to operate, like at Tollcross, its likely a masterplan involving consultation with local people would be more beneficial than a default support for continued class 4, 5 or 6 uses.

Large Industrial Estates – Cambuslang, Glasgow Business Park, Queenslie, and Hillington

- 5.3.8 The large industrial estates of city-wide economic importance appear to have performed well over the plan period, especially the more recently created locations.
- 5.3.9 **Cambuslang Investment Park** is a very large agglomeration of businesses and estates that is dominated by 'big box' developments with some office pavilions at Glasgow Gate, medium warehousing at Clyde Gateway East (Clyde Gateway) and smaller industrial units at Clydesmill Industrial Estate (Ryden). It appears well established and almost entirely built out. 4 sites were identified at 2023 accounting for 5.34 hectares. The final 'site' at Clyde Gateway East was under construction at December 2023 and being developed as three distinct development plots accounting for 2.15 hectares of the total land identified at 2023.
- 5.3.10 The main uses at Cambuslang Investment Park appear to be for storage and distribution, with some manufacturing. While some office pavilions have been developed, it is not clear that the location has attracted the financial and business sectors identified for it by the review.
- 5.3.11 **Glasgow Business Park** has also experienced recent storage and distribution development in the form of around 15,000 square feet of warehousing for Amazon. The location comprises a wide range of building types including office pavilions, small and medium warehousing and some large warehouses. There is now only a small proportion of the land that it had at plan adoption remaining available for development – two sites accounting for 4.74 hectares, one of which is in use for the storage of vehicles. There does not appear to be a strong financial sector presence as was identified for it by the review.

- 5.3.12 **Hillington Industrial Estate** is a very large industrial area, part of which lies within ward 4 of Glasgow, while the majority is within Renfrewshire. It includes a range of small, medium and large-scale industrial units. The location is marketed as [Hillington Park](#) (Fraser Group) and includes [the Arc](#) (CBRE/Ryden) as well as the regionally important [Deanside freight](#) hub (John Russell). Four sites accounting for 5.25 hectares of land were identified at 2023. There are some engineering companies located around the freight hub but it is not clear that the rail element is operational. The location does not appear to have a strong financial sector presence as was identified for it by the review.
- 5.3.13 The performance of **Hillington Industrial Estate** sits apart from all other EDAs as it has operated as a Simplified Planning Zone (SPZ) since 2014. Meaning that planning permission has not been required for most new developments. Broadly this appears to have been a success with new or replacement buildings being constructed without planning permission. Land remains available adjacent and within the rail freight facility. The SPZ is due to expire in August 2024, 10 years after the SPZ was created.
- 5.3.14 **Queenslie Industrial Estate** is a large industrial area with a wide range of building types and sizes and a range of businesses including small to medium units, 'big box' warehousing, and office pavilions.
- 5.3.15 In the east of the location the council have committed to creating the largest [material recovery facility](#) in Scotland by 2026, in the west, some older buildings have been cleared in preparation for new development led by the private sector and marketed as [Queenslie Park](#) (Savills/Geraldeve). Office pavilions are clustered at Wright Business Centre and the Panorama Business Village (Knight Frank), in the centre of the location, and host some smaller scale financial services as well as other business users. Burntbroom Court is a cluster of six units marketed at trade/industrial operators. Six sites were identified at 2023 accounting for 5.51 hectares of land.

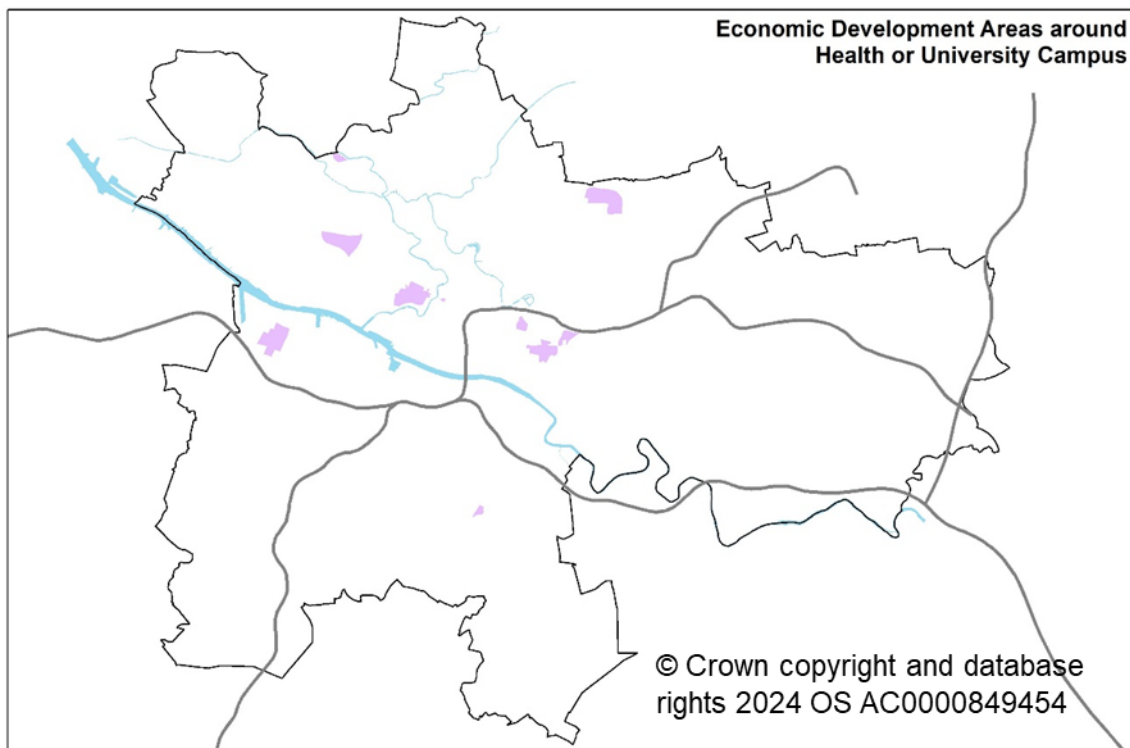
ACWEI Conclusions

- 5.3.16 Broadly, the industrial estates appear to have performed well while not necessarily attracting the growth sectors identified in the 2019 review. The closure of McVities in Tollcross raises questions about the role of the designation to the single user sites.

- 5.3.17 The challenge for the next Development Plan will be in identifying ways to continue to support the next generation of economic opportunities in the large industrial estates in what have become 'nearly full' locations. This could be through support for repurposing or expansion/amendment of existing buildings.
- 5.3.18 Each industrial estate also has a busy and bustling vehicle-based character rather than a manicured appearance and walkable scale that characterises some of the SEIL locations. It will be important to recognise the sectoral importance of vehicular access while also prioritising these locations should external funding become available for environmental or connectivity improvements.
- 5.3.19 The more advanced nature of the regeneration of Queenslie Industrial Estate hints at the challenges the other locations may face as older buildings become obsolete and the expectation of occupiers moves towards energy efficiency and net zero.

5.4 Economic Development Areas around Health or University Campuses

Diagram 3: EDAs around Health or University Campuses



5.4.1 10 Economic Development Areas around Health and University Campuses were identified as new economic development locations in the City Development Plan.

Area name	Key Sectors and Operators
Queen Elizabeth University Hospital	Health (NHS, see SEIL section above)
Gartnavel General Hospital	Health (NHS)
Stobhill General Hospital	Health (NHS)
New Victoria Hospital	Health (NHS)
Glasgow Royal Infirmary	Health (see SEIL)
Glasgow Caledonian University	Education (GCU, see SEIL)
University of Strathclyde	Education (UoS, see SEIL)
University of Glasgow (UoG) – Gilmourhill Campus	Education (UoG, campus development)
University of Glasgow - St Andrews Building	Education (UoG, School of Education)

Area name	Key Sectors and Operators
UoG – Garscube Campus	Education (UoG, Veterinary College , Centre for Virus Research)

- 5.4.2 These locations were identified in order to highlight their importance in terms of employment, to highlight support for the development of campus plans, and to recognise and reflect the positive clustering of some growth sectors around these anchor institutions. The preparation of new campus plans was to be supported.
- 5.4.3 The Health and University Campuses were not previously audited and so no baseline data on the operators, floorspace or units was collected. In attempting to apply similar methods to that used on traditional industry and business locations to create a baseline at 2023 several challenges were identified including that floorspace was sometimes not recorded by the Scottish Assessors Association (Garscube complex for example) or that buildings (and therefore floorspace) were bundled together as ‘College’ buildings therefore underplaying the number of buildings or users (‘units’) at the location.
- 5.4.4 No new masterplans have come forward and our early engagement indicates that most institutions have generally been reluctant to make their development programmes public although Glasgow Caledonian University have committed to the creation and adoption of a new masterplan.
- 5.4.5 There were 84 ‘units’ recorded by the Scottish Assessors Association at 2023 accounting for 915,688 square metres of floorspace (including non-industrial or business uses). The sheer amount of the floorspace highlights the scale of these institutions and their surroundings.

Area name	2023 Units	2023 Floorspace	Managed	General environment
Queen Elizabeth University Hospital	15	366,675	Yes	Good
Gartnaval General Hospital	6	132,854	Yes	Good
Stobhill General Hospital	4	88,144	Yes	Mixed
New Victoria Hospital	1	43,202	Yes	Good
Glasgow Royal Infirmary	6	193,127	Yes	Good

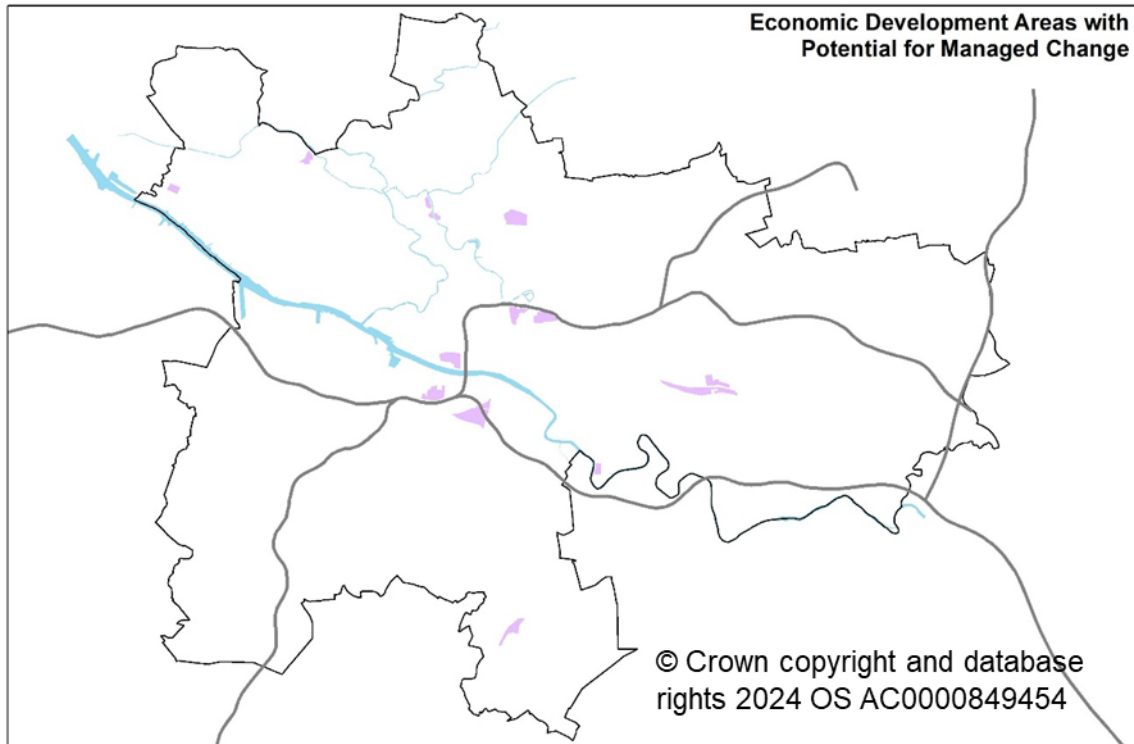
Area name	2023 Units	2023 Floorspace	Managed	General environment
Glasgow Caledonian University	1	91,686	Yes	Good
University of Strathclyde	38	251,573	Yes	Good
University of Glasgow – Gilmourhill Campus	12	280,788	Yes	Good
University of Glasgow – St Andrews Building	1	12,960	Yes	Good
University of Glasgow – Garscube Campus	Not collected	Not collected	Yes	Good
Health and Education EDAs total	84	915,688		

Areas around Health and University Campuses Conclusions

- 5.4.6 While clearly there has been development in some locations, for example within the redevelopment of Church Street at the Gilmourhill Campus, and there are re-development opportunities in others, for example the former hospital buildings at Stobhill, these sites have not become available to the market in the way that land at other EDAs typically does. In effect they are expansion sites reserved for the institution. In that regard these locations do not have the same relationship with the industrial and business land supply.
- 5.4.7 On the basis that no new campus plans have emerged against which to compare performance nor any land supply against which to assess opportunity, it is difficult to determine how successful the policy intervention has been. Nevertheless, it seems clear that emergence of Innovation Districts is interlinked with the actions of the institutions, and these Districts have much broader, more flexible catchments than past campus plans. Reflecting the Innovation Districts may be an alternative or evolution of the City Development Plan position.

5.5 Economic Development Areas with the Potential for Managed Change

Diagram 4: EDAs with Potential for Managed Change



- 5.5.1 Fourteen **Economic Development Areas with the Potential for Managed Change** were identified by the 2019 review including one formed by splitting Swanston Street EDA. These locations were considered to be able to support a mix of uses complementary to existing office, industry and storage uses (Use Classes 4, 5 or 6).
- 5.5.2 There was an expectation that, if accompanied by a masterplan, the character of these areas could move away from their previous business and industry focus to accommodate other employment uses without undermining the City Development Plan’s aim of promoting the creation of economic opportunity for all the City’s residents and businesses and encouraging sustained economic growth.

Area name	2023 Units	2023 Floorspace (square metres)	Managed	General environment
Anniesland Industrial Estate	67	20,549	Yes	Good
New Albion Industrial Estate	35	15,517	Yes	Mixed
Chapel Street Industrial Estate	26	3,782	Yes	Issues
Enterprise West Media Park	26	13,333	Yes	Mixed
Shuna Street	17	9,255	No	Issues
Possilpark	46	60,738	Partly	Mixed
Finnieston	48	59,930	No	Issues
Carntyne Industrial Estate	34	13,090	Partly	Mixed
Shettleston Road	66	16,243	No	Issues
Clyde Gateway/Swanston Street (part of)	44	7,168	Partly	Good
Kilbirnie Street	58	71,899	Partly	Issues
Scotland Street/ Milnpark Street	182	64,732	Partly	Issues
Drakemire Drive	47	47,206	Partly	Mixed
Townhead	Not collected	Not collected	No	Mixed
Potential for Managed Change EDAs total	696	403, 442		

Northwest - Wards 13 and 14

- 5.5.3 **Anniesland Industrial Estate** (known as Anniesland Business Park and marketed by industrials.co.uk) **and New Albion Industrial Estate** (Rydens/Colliers) in the northwest of the city, are managed and maintained estates in broadly residential areas. Both appear to have performed relatively well with notable occupiers including the National Timber Group and Tool Station; and the NHS and Overtone Brewing respectively. One site of 0.29 hectares was identified in the Industrial and Business Land Supply at 2023 at Anniesland Industrial Estate while there is brownfield land within the New Albion Industrial Estate EDA that may be an opportunity for an additional development. There was no clear imperative to support a move away from supporting the businesses they currently host.

Glasgow North Strategic Development Framework (SDF)

- 5.5.4 The [Glasgow North Strategic Development Framework](#) is of relevance to **Chapel Street, Enterprise West, Shuna Street and Possilpark Industrial Estate**, in the north of the city. It sets out additional policy principles against which the future development of these areas is now required to be considered including the continued support for supporting uses.

“Access improvements between the EDAs and Maryhill Town Centre and the canal will be supported. The introduction of supporting uses within EDAs will be encouraged, particularly at EDA entry points close to Maryhill Road”. Glasgow North SDF.

- 5.5.5 **Chapel Street Industrial Estate** is a collection of mainly smaller units within an estate designed as a cul-de-sac. It is marketed by City Property and appears well let but would benefit from further investment in the renovation of the buildings and environment.
- 5.5.6 The **Enterprise West Media Park** location is a gated estate that is publicly marketed as “**Glasgow North Trading Estate**” by Vine Property Management. It contains a collection of medium-sized units and appears well let but would benefit from improvements in terms of circulation and road surfacing.
- 5.5.7 Given the self-contained/gated nature of Chapel Street and Enterprise West, it is not clear how ‘managed change’ might physically be introduced to these areas but the introduction of uses like the climbing centre and the esports centre potentially indicate the impact of the designation in diversifying the businesses operating in the locations.

- 5.5.8 **Shuna Street/Shuna Place EDA** is a cluster of older canal-side buildings bounded by the canal to the west and roads to the east and south. Class Cabs occupy the northern workshop buildings while the southeastern buildings are in use as offices. There are 4 buildings recorded as vacant including 3 workshops and a derelict building. The vacant building at the southwestern corner has planning permission for residential use. The location would benefit from general upgrades to the environment, but the introduction of residential use potentially undermines the continued recognition of this location for industrial and business uses (even where office developments and light industry may be compatible in practice).
- 5.5.9 **Possilpark**, Industrial Estate Economic Development Area comprises a large Allied Vehicles compound, a BT compound (accessed off Ashfield Street), Denmark Street Industrial Estate and a range of commercial uses along Hawthorn Street to the south. The commercial uses include petrol stations and a retail park with Farmfoods and Buzz Bingo in the southeastern corner. Broadly the location appears to be operating well but there is limited scope for businesses to expand as evidenced by the Allied Vehicle compounds outwith the location to the south and east.

River Clyde Corridor Strategic Development Framework

- 5.5.10 The [River Clyde Strategic Development Framework](#) is potentially of relevance to **Finnieston EDA** to the west of the city centre. It sets out additional policy principles against which future development is now required to be considered including the continued support for maintaining an effective land supply and support a managed approach to diversification where appropriate.
- 5.5.11 Finnieston EDA comprises a mix of older brick-built warehousing, metal-clad warehousing, and more modern higher density office developments. The location has a traditional grid pattern, but it is severed to the north by the Clydeside Expressway and to the south by the River Clyde.
- 5.5.12 Platform_ are currently developing the southeastern part of the location as build-to-rent homes, while alternative proposals for the remaining site to the north of that development are also seeking planning permission for residential.

5.5.13 According to the River Clyde SDF, Finnieston EDA now forms the 'missing link' between the City Centre and the SEC Campus. It sets a new aim for the area to increase the residential population in order to enhance the vibrancy of the area and support compatible (presumably non-industrial) commercial uses. It highlights that enhancing and improving connectivity by creating activated, safe and overlooked walking and cycling routes is a priority and the lessening the impact of the significant road and flood prevention infrastructure will be key to the areas successful change. It also identifies that the area is currently lacking in quality open space, and the provision of new, multifunctional open space is considered critical to achieving higher density, liveable neighbourhoods.

Inner East Local Development Framework

5.5.14 The [Inner East Strategic Development Framework](#) is of relevance to **Carntyne Industrial Estate, Shettleston Road/Old Shettleston Road** and the **Swanston Street part of Clyde Gateway** in the east of the city. It identifies the need to create more pleasant environments in the EDAs and that their mono-use has led to a lack of nighttime activity and fragmentation of the urban fabric.

5.5.15 It sets out additional policy principles against which the future development of these areas is now required to be considered including the continued support for supporting uses. A key action is to encourage the preparation of EDA improvement plans driven by local demand and led by local stakeholders and to produce a bespoke baseline report to develop a thorough understanding of key issues, assets, and development opportunities.

5.5.16 **Carntyne Industrial Estate Economic Development Area** includes Carntyne Industrial Estate (Knight Frank/Shed5 Ltd), a breakers yard and a cluster of live-work yards. There were no sites identified at this location.

5.5.17 **Shettleston Road/Old Shettleston Road** is an elongated cluster of businesses running east-west along the southern side of the Airdrie-Bathgate rail line. It includes a batching plant, breakers yard, self storage, several live-work yards, and the cleared site of a former factory (not currently included in the Industrial and Business Land Supply as it is being promoted for an alternative use by the owner). One other site of 0.5 hectares was identified at 2023.

5.5.18 **Clyde Gateway/Swanston Street** Economic Development Area with the Potential for Managed Change includes Swanston Street Industrial Estate (Spectrum Properties) and Cotton Street Business Park (Spectrum Properties) as well as some residential live-work yards. There has been no planning application interest in changing the use of the site. It is part of the larger South Dalmarnock Masterplan area, and a refresh of the wider masterplan would be the appropriate mechanism to introduce and consider a bespoke approach to the redevelopment of this area. There were no sites identified at this location.

South Central Local Development Framework

5.5.19 The [South Central Local Development Framework](#) is of relevance to **Kilbirnie Street**, and **Scotland Street/Milnpark Street** in the south of the city. It sets out additional policy principles against which the future development of these areas is now required to be considered including the continued support for supporting uses.

5.5.20 **Kilbirnie Street EDA** presents as a cluster of older warehouse buildings bounded by railway lines. The coherence of the location has clearly been impacted by the relatively recent construction of the M74 motorway which splits the site. It includes two marketed industrial estates at West Street Industrial Area and Tradeston Industrial Estate (both marketed by M Suleman Property Company Limited) and a major Arnold Clark vehicle compound. The location relates closely to Tradeston EDA which is situated to its north. At March 2024, Cushman and Wakefield were [marketing a 2.56 hectare site](#) within the location that was not accounted for in the Industrial and Business Land Supply 2023.

5.5.21 **Scotland Street/Milnpark Street** presents as mix of old, new, planned and unplanned industrial and office buildings arranged on the city's grid pattern. There are three managed areas including Miln Park Trading Estate (Vine), The Schoolhouse (Urban Office/Savills), and Kinning Park Business Centre (Spectrum Properties). A cluster of big building leisure uses has emerged, and a new Amazon warehouse was under construction at December 2024.

South – Ward 1 Linn

- 5.5.22 **Drakemire Drive Economic Development Area** with the Potential for Managed Change is located in Ward 1 to the western edge of Castlemilk. It presents as a bustling industrial area with a range of industrial units of various sizes. Linn Park Industrial Estate has smaller units and was less outwardly active and the H Morris Group has taken ownership of the 18,959 square metre vacant warehouse to the north that previously accommodated a range of big building leisure uses. The location retains Castle Precision Engineering, Scottish Power, Lanes Group and Caledonian Recycling. There were no sites identified at 2023 and no recent planning applications indicating changes away from use class 4, 5 and 6.

City Centre Strategic Development Framework

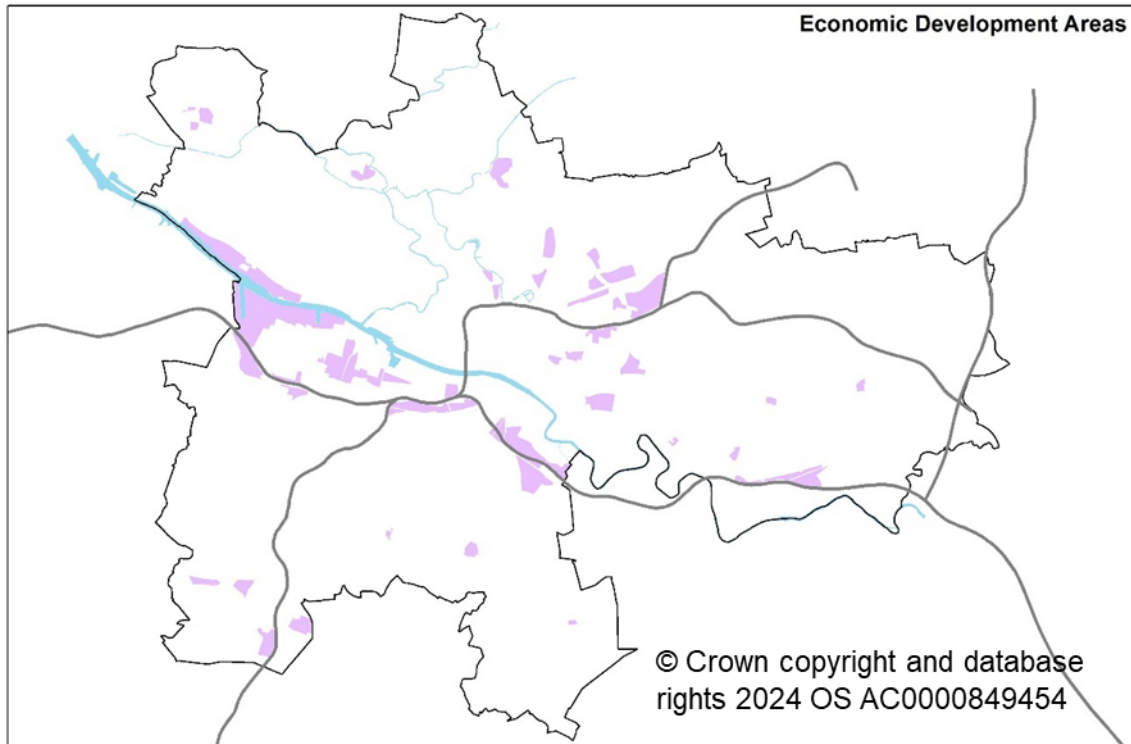
- 5.5.23 The [City Centre Strategic Development Framework](#) is of relevance to the **Townhead/Cowcaddens economic development area** in the city centre. It sets out additional policy principles against which the future development of these areas is now required to be considered as summarised in the City Centre SEIL section.
- 5.5.24 The Townhead/Cowcaddens Economic Development Area is located in the north and northeast of the City Centre covering two distinct geographies either side of Glasgow Caledonian University. The recently completed Sighthill Bridge lands in the Townhead element of the EDA. The City Centre Strategic Development Framework, Townhead District Regeneration Framework and the Cowcadden District Regeneration Framework are of relevance. They identify these areas as traffic dominated with few facilities and a lack of investment in the public environment. They acknowledge the character of the industrial/ business areas have been impacted by a cluster of new purpose-built student accommodation developments. It commits to a masterplan of North Townhead, Dobbies Loan and Hanover Street.

Areas with Potential for Managed Changed Conclusions

- 5.5.25 The audit identifies those locations identified as being 'areas with potential for managed change' are diverse. It seems clear that the market for, and drivers of, change are not equally applicable and that most areas have retained their core industrial and business character.
- 5.5.26 In some cases, place-based planning policy has been developed, for those EDAs in SDF or LDF areas for example, and these more recent documents render the City Development Plan designation less relevant. In other locations, it would appear that these have performed better than anticipated and have lacked alternative proposals, suggesting, again, that the designation has become less relevant.
- 5.5.27 Strategic and Local Development Frameworks are consistent in their continued support for community-led improvement plans and while there appears to have been little community appetite for the production of masterplans so far. Local Place Plans may provide a mechanism to frame the communities' expectation for change in all EDAs not just those previously identified as having the potential for managed change.

5.6 Standard Economic Development Areas

Diagram 5: Standard Economic Development Areas



- 5.6.1 There are 45 'standard' **Economic Development Areas** across the city. 42 remained 'as allocated' in the City Development Plan of 2017 following the 2019 review while 3 others were reformed as the remaining parts of an area split to create an ACWEI designation.
- 5.6.2 These locations form the base of provision across the city with 34 subsequently covered by Strategic and Local Development Frameworks as detailed below.
- 5.6.3 The [draft Greater Pollok Local Development Framework](#) (November 2023) covers 3 EDAs at Darnley Industrial Estate; Darnley Mains; and South Nitshill Industrial Estate.
- 5.6.4 The [Govan-Partick Strategic Development Framework](#) (February 2020) covers Shieldhall; Drumoyne Road/Meiklewood Road; Elderpark Workspace; Helen Street/Loanbank Industrial Estate; Moorpark; Woodville Street; and Govan Road/Brand Street Economic Development Areas.

- 5.6.5 The [South Central Local Development Framework](#) (September 2023) covers Academy Park/Gower Street; Kinning Park Industrial Estate; Tradeston; Vermont St/McLellan St/Kinning Park; Polmadie; Dixon's Blazes; St Andrew's Industrial Estate/Pollokshaws Road.
- 5.6.6 The [North Glasgow Strategic Development Framework](#) (October 2022) covers Garscube Industrial Estate; Oakbank Industrial Estate; Balmore Industrial Estate; Cowlairs Industrial Estate; M8 Foodpark; Atlas Industrial Estate; Petershill Road/St Rollox; and Charles St
- 5.6.7 The [draft Drumchapel Local Development Framework](#) (September 2023) covers Drumchapel Economic Development Area.
- 5.6.8 The [Inner East Strategic Development Framework](#) (July 2023) covers Brook St/Crownpoint Rd/London Rd; Annick St Industrial Estate; Causewayside Street; Westthorn/London Road; Alexandra Parade; Glenpark St/Duke St; and College Business Park/Wellpark.
- 5.6.9 The [draft Greater Easterhouse Strategic Development Framework](#) (November 2023) does not cover any standard Economic Development Areas but does cover Queenslie Industrial Estate and Glasgow Business Park Areas of City-Wide Economic Importance
- 5.6.10 There are eleven standard Economic Development Areas which have not subsequently been included in a spatial Development Framework including Glenwood Business Park, Pollokshaws, Thornliebank Industrial Estate, Cardonald Park, Craigton Industrial Estate and Cathcart in the south of the City; Dalsholm Industrial Estate, in the north of the city; and London Rd/Carmyle Ave; Baillieston Distribution Centre; Blochairn Industrial Estate; and Petershill Road in the east.

Area name	Ward	2023 Units	2023 Floorspace (square metres)	Managed	General environment
Glenwood Business Park	1	65	5,197	Yes	Good
Thornliebank Industrial Estate	2	41	61,328	Partly	Mixed
Pollokshaws	2	13	11,095	No	Issues
South Nitshill Industrial Estate	3	23	30,663	Yes	Issues
Darnley Industrial Estate	3	38	18,033	No	Mixed
Darnley Mains	3	0	0	No	-
Cardonald Park	4	18	45,043	No	Good
Shieldhall	5	92	112,046	No	Good
Drumoyne Road/Meiklewood Road	5	32	23,866	No	Mixed
Elderpark Workspace	5	60	7,144	Yes	Good
Helen St/Loanbank Industrial Estate	5	97	105,934	Partly	Mixed
Moorpark	5	42	21,816	Yes	Good
Woodville Street	5	192	72,543	Partly	Issues
Govan Road/Brand Street	5	129	39,971	Partly	Good
Academy Park/Gower Street	5	31	8,195	Yes	Good
Vermont St/McLellan St/Kinning Park	5	94	99,161	Partly	Mixed
Kinning Park Industrial Estate	5	28	28,136	Partly	Good
Tradeston	5	95	30,142	No	Issues
Craigton Industrial Estate	6	22	21,487	No	Issues
Polmadie	7	104	74,407	No	Mixed
Cathcart	7	1	57,167	Yes	Good
Dixon's Blazes	8	206	102,035	Partly	Mixed
St Andrews Industrial Estate/Pollokshaws Road	8	8	13,351	Partly	Mixed

Area name	Ward	2023 Units	2023 Floorspace (square metres)	Managed	General environment
Brook St/Crownpoint Rd/London Rd	9	405	112,040	Partly	Mixed
Oakbank Industrial Estate	11	31	8,681	Yes	Good
Garscube Industrial Estate	11	23	19,473	No	Issues
South Street	13	233	190,498	Partly	Mixed
Drumchapel	14	143	64,195	Partly	Mixed
Dalsholm Industrial Estate	15	17	26,967	Partly	Good
Balmore Industrial Estate	16	72	56,823	Partly	Issues
M8 Foodpark	16	38	20,120	No	Mixed
Cowlairs Industrial Estate	16	20	34,229	No	Mixed
Atlas Industrial Estate	17	32	24,275	Partly	Mixed
Petershill Road	22	10	51,583	No	Issues
Annick Street Industrial Estate	19	58	11,168	Yes	Good
London Road/Carmyle Avenue	19	33	15,536	Partly	Mixed
Causewayside Street	19	36	9,896	Partly	Mixed
Westhorn/London Road	19	10	6,610	No	Issues
Baillieston Distribution Centre	20	22	17,762	Yes	Good
Petershill Road/St Rollox	17	1	20,867	Yes	Good
Charles Street	22	45	46,235	Partly	Issues
Blochairn Industrial Estate	22	35	86,456	Partly	Mixed
Alexandra Parade	22	86	57,028	Partly	Mixed
College Business Park/Wellpark	22	53	9,839	Partly	Good
Glenpark/Duke Street	22	45	30,579	Partly	Issues

Area name	Ward	2023 Units	2023 Floorspace (square metres)	Managed	General environment
standard EDAs total		2,881	2,001,877		

Wards 1 to 4 – Linn, Newlands/Auldburn, Greater Pollok, and Cardonald

- 5.6.11 **Glenwood Business Park** Economic Development Area is a modern, managed estate comprising mid-range units with large access doors. Estate owned by Jobs and Business Glasgow and notable occupiers include Department for Work and Pensions, Polytech Metals and Glasgow City Council. There were no sites identified at 2023. Around a fifth of units and floorspace was recorded as vacant by the assessor at 2023.
- 5.6.12 **Thornliebank Industrial Estate** Economic Development Area is a post-war cookie-cutter industrial estate layout providing industrial and warehousing opportunities at different scales. It hosts a range of uses and users including Rawlplug, Star Refrigeration, Kelvin Metals, Inverarity Morton (wines) and the Caledonia Business Centre. The physical environment would benefit from investment, in particular the road surfacing, and older buildings are likely to need support adapting to the requirements of net zero, but the location as a whole appears to be performing well with only one unit recorded as vacant accounting for less than 1% of the estate's floorspace. Two sites accounting for a total of 1.21 hectares were identified at 2023 including one under construction at December 2023. Recent adjacent residential development (to the north) has led to some speculative enquiries about land within the estate.
- 5.6.13 **Pollokshaws** Economic Development Area is the remnants of a larger historic cluster of industrial uses adjacent to the Shawbridge Transformational Regeneration Area. The remaining building complex is old and positioned on a bend in the White Cart Water which provides the northern and eastern boundaries. There were no sites identified at 2023 although there is a cleared vacant site to the southwest and a retail park with industrial scale 'big boxes' to the south. While notable issues with circulation, parking and boundary treatment were noted, at 2023 the vacancy was recorded at about 5% with the main occupants being the Pitches five-a-side and Torelli Furniture
- 5.6.14 **South Nitshill Industrial Estate** Economic Development Area comprises a council yard, a series of older warehouses and factory buildings, the relatively modern Museum Business Park and the Museum Resource Centre along a single street. The estate is managed on behalf of City Property and would benefit from maintenance investment in terms of roads/pavement conditions and tipping. Notable occupants include Glasgow City Council, BCS Group and Twisted Hygiene and Packaging. There were no sites identified at 2023 but there may be opportunities to re-configure yardspace and buildings to create opportunity.

- 5.6.15 **Darnley Industrial Estate** Economic Development Area comprises a multifunctional employment location dominated by 'big box' form and with a range of uses in, or adjacent to, the EDA boundary. Established uses include car sales (Vertu Motors) to eastern perimeter which screens the bulk of the estate from the main Kennishead Road thoroughfare. Notable uses and users include a waste transfer station, Norfolk Logistics Cold Storage, Brandon hire and Trimite Scotland. There was one site identified in the Industrial and Business Land Supply at 2023 although this was in use for storage. There is land to the west (outwith the EDA) with the potential for development and the buildings to the southwest have a 'big box' form and could potentially provide suitable accommodation.
- 5.6.16 **Darnley Mains Economic Development Area** was formerly identified as a 'high amenity' location intended to attract large scale headquarter campus type opportunities as per the previous Scottish government requirement to identify such sites. At December 2023, there were no industrial or business environment to assess and while one site of 1.37 hectares was identified at 2023, the rest of the location has been developed for housing by Persimmon. An application for planning permission for local shops and further housing was under consideration at March 2024. Even if the remaining element was to be developed for an industrial or business use, the scale of the site would be small compared with the other EDAs in the City Development Plan.
- 5.6.17 **Cardonald Park Economic Development Area** is a large, relatively modern industrial and business location. It accommodates a number of 'big box' users including Volvo and Reach printing (Daily Record). It also accommodates offices for the NHS and Southside Housing Association. It had three expansion opportunities accounting for 2.58 hectares at 2023, including a site marketed as 'Radial Point' that, at December 2023, appeared to have recently been prepared for development. Avison Young and Colliers were both marketing opportunities. The general environment was good, but vehicle scaled. At 2023, the Scottish Assessors Association recorded no vacancies.

Ward 5 – Govan: western Economic Development Areas

- 5.6.18 **Shieldhall Economic Development Area** is an extensive area of economic activities including the strategically important George V Docks freight hub (Peel Ports), Govan Shipyards (BAE Systems) and the emerging Glasgow Riverside Innovation District (led by University of Glasgow). The EDA boundary adjoins the **Queen Elizabeth University Hospital** campus where there are localised issues with parking. Shieldhall had a generally good environment that lacked cohesion which is in part due to the scale of designation and unmanaged nature of the area as a whole. The recent creation of the Govan Workspace at Fairfield, the ongoing construction of the Govan/Partick bridge, and the breaking of ground on the Kedan's Health Innovation Hub at Linthouse indicate this is an area that is continuing to undergo change following the construction of the QEUH. 3 sites accounting for 7.08 hectares were identified at 2023 and around 12% of units and 10% of floorspace was vacant.
- 5.6.19 The [River Clyde Development Corridor Strategic Development Framework](#) is also of relevance to **Shieldhall Economic Development Area** as it identifies that it may have a supporting role to play in the Glasgow Riverside Innovation Districts growing importance to the city. It states that the Council will continue to review the level of protection applied and will identify areas with the potential to accommodate different uses through a managed process.
- 5.6.20 **Drumoyne Road/Meiklewood Road Economic Development Area** comprises two adjacent (unconnected) streets but is otherwise a standalone location. Drumoyne Road includes engineering and construction uses; and Meiklewood Road includes a Police Vehicle compound, council yard, auction house, children's nursery and a couple of business and industry users. While not a coherent location with a mixed environment, in particular circulation issues, it appears to be performing well with 3% of units and 6% of floorspace vacant at 2023. No sites were identified at 2023.

Ward 5 – Govan: central cluster

- 5.6.21 The central part of the Ward 5: Govan comprises a cluster of 6 adjacent Economic Development Areas running east to west from **Elderpark Workspace, Helen/Street/Loanbank Industrial Estate, Moorpark, Woodville Street, Govan Road/Brand Street** leading to the **Pacific Quay Strategic Economic Investment Location Economic Development Area**. Assessed below as distinct entities they are clearly interlinked with characteristics shared between adjacent elements and some have distinct industrial estates within them.
- 5.6.22 **Elderpark Workspace Economic Development Area** is a managed building complex (by Govan Workspace) with a range of workshop, office, store and studio space. It had a good environment although around 30% of units and floorspace were recorded as vacant at 2023. There were no sites at the location at 2023. It adjoins Helen Street/Loanbank Industrial Estate on its eastern boundary.
- 5.6.23 **Helen Street/Loanbank Industrial Estate Economic Development Area** is a large, busy, multifunctional Business and Industry area comprising several managed estates including Junction 24 Business Park (Dawn Developments), City Line Industrial Estate (Savills), Harmony Court (Industrials.co.uk), Rowan Business Park (Graham and Sibbald). It appears to cater to a range of small, medium and large industrial and storage users including Turner Group, Iron Mountain (records maintenance), Saint Gobain (materials) and Rearo (laminates). It also has newer office pavilions (Police Scotland, Matrix Control Solutions Ltd) and ancillary uses. At 2023, vacancy rates for units and floorspace was below 10%. One site of 0.94 hectares was recorded at 2023.
- 5.6.24 **Moorpark Economic Development Area** is presents as a range of industrial compounds called Moorpark Court (Rydens), Moorpark Industrial Estate (Jobs and Business Glasgow), Moorpark Central (Savills) adjacent to East Govan/Ibrox TRA. These include office pavilion, mid size units, and 'big box', accommodating the NHS, National Grid and Wolseley UK (plumbing). The environment was generally good but clearly prioritised security above accessibility. There were no sites identified at 2023 and vacancy rates were below 5% for both units and floorspace.
- 5.6.25 **Woodville Street Economic Development Area** presents as an older industrial area emerging as an agglomeration of newer industrial clusters, namely: Ibrox Business Park (Ryden), Woodville Park Industrial Estate, Woodville Court Industrial Estate (Ryden), Edmiston Trade Park, Central House, Acre House, Maritime House (Ryden), and Kinloch House.

- 5.6.26 Edmiston Trade Park appears as recently refurbished but many other buildings in the EDA are in poor condition and localised issues with roads/pavements, street lighting, tipping and boundary treatment, on-street parking, circulation and yard space were noted. Vandalism was evident across the area. Even still the area appears to be performing relatively well with notable operators such as SCSA (Forklift training), WGM Engineering, W K McMillan Steel Fabricators, Rapid Export Packaging Services Ltd, Master Auto Glass Ltd, KMK Furnishing, Dream Home Scotland Ltd all located here resulting in 6% of floorspace being recorded as vacant. There were no development site opportunities identified at 2023 but the environment would benefit significantly from further investment.
- 5.6.27 **Govan Road/Brand Street Economic Development Area** comprises Watermark Business Park, Festival Court (Avison Young), Festival Business Centre (Jobs and Business Glasgow), Melissa House, Graham House, and "100 Brand Street" Digital Media and Business Centre (100BrandSt.com). Part of the site was formerly an Enterprise Zone.
- 5.6.28 It presents as an outward facing triangle of business and industry users, including office, industry and distribution. It has a range of building types including modern office pavilions, 'big box' units and older versions of both. It presented as a generally good environment, but some areas have gated access. There were no sites identified at 2023 and vacancy was below 10% for both units and floorspace. Notable occupiers included UK Border Agency, NHS, George Gilmour Metals, Mears Ltd and a range of creative industry users demonstrating its interlinking with the cluster of media industries at Pacific Quay Strategic Economic Investment Location Economic Development Area which adjoins the northern part of this EDA.
- 5.6.29 Overall, the **Ward 5: Govan – central cluster** presents as a continuous industrial and business dominated area. The sheer scale of the land involved takes it beyond a neighbourhood-level assessment and the [Govan/Partick Strategic Development Framework](#) sets out an action to promote the development of the Glasgow Riverside Innovation District that would support high value added industries located between Glasgow University Campus, Central Govan and the QEUH. This include would include measures to address market failure, improve connectivity and address place quality and is likely to have an impact on the Ward 5: Govan – central cluster.

Ward 5 – Govan: eastern cluster

- 5.6.30 The eastern part of the Ward 5: Govan comprises a cluster of 6 adjacent Economic Development Areas running east to west from **Academy Park/Gower Street, Vermont Street/McLellan Street/Kinning Park, Scotland Street/Milnpark Street, Kinning Park Industrial Estate, Tradeston**, leading to the **Kilbirnie Street Economic Development Area**. Assessed below as distinct entities they are clearly interlinked with characteristics shared between adjacent elements and some have distinct industrial estates within them.
- 5.6.31 **Academy Park/Gower Street Economic Development Area** is a modern managed estate of office pavilions called “Academy Park” (Camlin Ltd/Rydens). While the area is bounded by rail lines to the north, east and south and vehicle access to the EDA is not direct to the adjacent **Vermont Street/McLellan Street/Kinning Park** EDA, the physical environment presents as well maintained. Notable occupiers included Barnardo’s national office and Kube Networks but vacancy, at 2023, was around 22% for both units and floorspace suggesting perhaps an impact of the pandemic on non-city centre office locations.
- 5.6.32 **Vermont Street/McLellan Street/Kinning Park Economic Development Area** is an extensive industrial and business location extending along the south site of the M8 motorway (along Maclellan Street and Vermont Street) comprising Centurion Business Park (Ryden), Excelsior Industrial Estate (industrials.co.uk), The Claremont Centre (Property Services), Kinning Parkway Estate (Jones Lang Lasalle), Century Business Park (Savills). The only vehicular access is via Scotland Street at the junction with the M8. In the main the location consists of ‘big box’ developments including Jacobs and Turner Ltd (Trespass), Amazon and Scottish Galvanisers but there are offices at Clutha House and at the eight office pavilions at Centurion Business Park accommodating occupiers including the NHS. Elements of the environment were well maintained but overall, the assessment is of a mixed quality environment. There were no sites identified at 2023 and vacancy was below 10% for units and floorspace suggesting the location is performing remarkably well.
- 5.6.33 **Scotland Street/Milnpark Street Economic Development Area** is identified as having the potential for managed change and has already been audited above but it forms part of this cluster and is in particular related to **Kinning Park Industrial Estate**.

- 5.6.34 **Kinning Park Industrial Estate** presents as a vibrant cluster of trade counters, the bulk of which is currently marketed as “Kingston Bridge Trading Estate” ([Canmoor](#)/Rydens/Montague Evans). The location is broadly characterised by the range of trade counter operators: Johnstone Paint, Howdens Screwfix, Crown Decorating, and Graham Plumbers Merchants and presents as bustling although 14% of units and around 18% of floorspace was recorded as vacant at 2023 including a single large warehouse unit of 3,794 square metres. It is a potentially quality environment, but on-street parking was noted as an issue.
- 5.6.35 **Tradeston Economic Development Area** is an older industrial area reduced in size by motorway developments to the north. It is bounded by a rail line to the south but includes two underground stations (West Street and Bridge Street) at its eastern and western extents and is has an exit ramp from the M74 from the west. Vacancy reports as below 10% of units and below 5% of floorspace and occupiers include Murgitroyd and Company, J Thomson Printers, Holland House Electricals and Richmonds Plumbing and Heating Merchants Ltd. Also, of note to the range of users is a sports centre operating as Super Soccer accounting for almost 4,000 square metres of floorspace while Scotland Street School museum is located in the EDA and accounts for around 3,300 square metres of floorspace. There was one site of 2.73 hectares identified at 2023, it was in use for storage of materials at December 2023, and surrounds Scotland Street School.
- 5.6.36 **Kilbirnie Street Economic Development Area** is identified as having the potential for managed change and has already been audited above but it forms part of this cluster and is in particular related to **Tradeston**.

Wards 6 to 8 – Pollokshields, Langside and South Central

- 5.6.37 **Craigton Industrial Estate** comprises a cluster of industrial buildings and yards around a major anchor (UPAC) where recent investment is evident. The surrounding environment would benefit significantly from further investment. The location has awkward access to strategic road network (through residential area) and would benefit from improved road/cycle/pedestrian access to Cardonald Station to west. One site of 0.86 hectares were identified at 2023 but there are potentially up to 5 smaller potential plots along northern edge (unmarketed). Notable occupiers include UPAC Packaging Group, Easdales, Patersons Materials, and Precision Engineering Ltd. While around 22% of units were vacant at 2023, they accounted for only 6% of floorspace indicating that it is smaller units that are vacant.

- 5.6.38 **Polmadie Economic Development Area** appears as 4 distinct areas: southeast is the large Polmadie recycling centre (Viridor) and Glasgow taxi inspection centre; north east is Jessie Street cul-de-sac comprising concrete batching plants, Crolla (ice cream), storage and vehicle repair uses; northwest is a collection 'big box' users (AAH, Waukesha Bearings, Rightway Wholesale, and easyStorage), and south west is a mix of uses that connect with the wider street network (United Wholesale, a fire station, car repair and other commercial uses). Collectively they offer a wide range of users and uses including a range of building scales up to 'very big box' operators. Other notable operators include Ardent (Hire), Glasgow City Council, Breedon, and Wingate. The environment is mixed reflecting the nature of the clustered businesses with apparently vacant yards and buildings. 10% of units and 15% of floorspace were vacant at 2023.
- 5.6.39 **Cathcart Economic Development Area** a much-reduced area following the redevelopment of the Scottish Power offices to the north as homes. The remaining site comprises the Weir Pumps compound now branded as Celeros Flow Technology. An application for housing from Cala has been submitted for the western part of the location and at the site visit the older office buildings (formerly vacant) had been demolished and cleared. The remaining location includes testing facilities, offices and storage warehouses.
- 5.6.40 **Dixon's Blazes Economic Development Area** is an area that has undergone significant change since first identified including the construction of the M74 motorway. The City Development Plan recognises it as three geographies: west, Caledonian Bus Depot (First Bus); south, now a Starbucks, petrol station and self-storage; and northeast, the main body of the remaining industrial area. The main body itself has effectively been split into three by the development of housing and a retail park in the west and the motorway off ramp in the centre. It comprises several industrial estates Southpoint Industrial Estate (Fisher German), Shawfield Retail and Trade Park (McIntyre Property Consultants), Morris Park (morriskpark.co.uk), 24 Rosyth Road. Notable operators also include Mathew Algae (coffee), City Refrigeration. There were no sites identified at 2023 and vacancy of units and floorspace was both under 5%. The number of units has increased by 4 times since 2018 without a corresponding increase in floorspace. This reflects the recent subdivision of larger units as has occurred at Morris Park.
- 5.6.41 **St Andrew's Industrial Estate/Pollokshaws Road Economic Development Area** consists of two separate elements. Southwest, a derelict former Printworks building and, northeast, the more modern St Andrews Industrial Area (industrials.co.uk). Both are awkward to access following road changes and relatively distant from rail stations. It is however adjacent to the new bus depot identified as part of CP040 Dixon's Blazes. Notable occupiers include Job Centre Plus, Rightdose (pharmaceuticals), Rexel (cables), and Kidd (packaging). There were no sites identified at 2023 and the industrial estate reported as fully occupied.

Ward 9 - Calton

- 5.6.42 **Brook St/Crownpoint Rd/London Rd Economic Development Area** is a very large cluster of industrial and business uses set out across the City's traditional street pattern northeast of Bridgeton town centre. It comprises [Broad Street Business Complex](#), [Crownpoint Studios](#), [Broad Street Industrial Estate](#) (Spectrum Properties), and Eastgate (Glasgow City Council) which between them provide small industrial units, workshops, offices, and creative and studio space. It also includes a range of other building types and sizes and has by far the most units of any Economic Development Area. Notable occupiers include Glasgow City Council, Police Scotland, Glasgow Vintage Vehicle Trust, G and M Radiators Manufacturing, and George Boyd and Co (Ironmongers). There were no sites identified at 2023 although there is permission for a new industrial estate to be formed from a vehicle storage site south of Broad Street. The environment is mixed, and the age and condition of the buildings suggest investment would be beneficial. Graffiti and tipping were also evident while not widespread. Vacancy was under 5% for both units and floorspace suggesting the area is operating well.

Ward 11 to 16 – the northwest

- 5.6.43 **Oakbank Industrial Estate Economic Development Area** comprises of 9 blocks of trade and industrial units marketed as Oakbank Trading Estate (Ribston/BNP Paribas/[Savills](#)). Multiple units have undergone extensive refurbishments which have included new roofs, new roller shutter doors, and cladding. The EDA is bound to the north by the canal, east by Possil Road and to the southwest by Garscube Road (onto which it accesses). There were no sites identified at 2023. Notable occupiers included Plumbstore and Thevegankind Ltd. At 2023, around 13% of units were vacant accounting for 6% of floorspace.
- 5.6.44 **Garscube Industrial Estate Economic Development Area** comprises predominantly industrial buildings, some of which have been repurposed to house cultural or creative organisations such as Scottish Opera, the Royal Conservatoire, as well as The Glue Factory and Burns Street studio spaces. Other notable occupiers include Mathews Foods, Chubb Fire and Security and Dulux Decorating Centre. Millenium Court provides some small-scale office provision. There were no vacancies identified at 2023. The EDA has one site of 0.29 hectares within the boundary although another site between the EDA and the canal also appeared as available for redevelopment.

- 5.6.45 **South Street Economic Development Area** is a large, elongated cluster of industrial buildings and uses running alongside the River Clyde, bookended by BAE Systems shipyard and training centre in the northwest and the Clyde Tunnel to the southeast. It is the largest EDA by floorspace (by far) and includes 34 units bigger than 1,000 square metres floorspace. Notable occupiers include Albion Automotive, Arnold Clark, Malcolm Group, Forrest Furnishing, and Gilmour and Dean. It includes live-work yards as well as South Street Industrial Estate (Gatehouse PM), Albion Trading Estate (Vine), Clydeaway House (Clydeport/McNicol), Premier Business Park (Premier Housewares), material recovery yards, vehicle repair and engineering companies giving it a mixed character in terms of environment. 10% of units and 4% of floorspace were vacant at 2023. There were no sites identified at 2023 but there was land outwith the EDA to the southeast (Glasgow Harbour).
- 5.6.46 The [River Clyde Development Corridor Strategic Development Framework](#) is also of relevance to **South Street Economic Development Area** as it identifies that it may have a supporting role to play in the Glasgow Riverside Innovation District's growing importance to the city. It states that the Council will continue to review the level of protection applied and will identify areas with the potential to accommodate different uses through a managed process.
- 5.6.47 **Drumchapel Economic Development Area** is the areas north, east and south of the Edrington Whisky complex (assigned as an Area of City-Wide Economic Importance in 2019). The southern part comprises a managed estate and Morton's Rolls factory, to the north is a small cluster of edge-of-town centre office uses, while the area to the east is much larger and includes a range of building types and users including PCT, an Aldi supermarket and Garscadden House (City Property) and Dalsetter Business Centre (Glasgow City Council). The recent introduction of the supermarket adjacent to town centre in north has potential to draw more visitors to the area and attract more customer-facing businesses. The location had two sites accounting for 2.11 hectares which could potentially accommodate a range of buildings and uses but which has attracted tipping in the past. At 2023, 14% of units and 3.8% of floorspace were vacant reflecting a notable level of vacancy in the City Property units.
- 5.6.48 **Dalsholm Industrial Estate Economic Development Area** comprises Dalsholm Industrial Estate (City Property/Graham and Sibbald), a cluster of other industrial buildings and yards, and a major anchor (Cullen Packaging) where recent investment is evident. Other notable occupiers include Hoist and Access Services, Directional Data Systems and a council Waste Recycling Centre. The location has awkward access to strategic road network (through residential areas) but no noted environmental issues. There were no sites identified at 2023. At 2023, four small units were recorded as vacant accounting for 23.5% of units but only 1.6% of floorspace.

- 5.6.49 **Balmore Industrial Estate Economic Development Area** comprises Balmore Industrial Estate (City Property/Rydens), a cluster of other industrial buildings and yards, and a major anchor (Allied Bakeries/Kingsmill). Other notable occupiers include Mim's Enterprises, Scottish Media Group, University of Glasgow and Cadder Housing Association. There were no sites identified at 2023 but potential land surrounding the EDA was noted and it seems likely that many of the buildings will need significant refurbishment or demolition, which may in turn present additional land. At 2023, 18% of units were identified as vacant accounting for 5% of floorspace. The location is distant from the strategic road network and significant maintenance issues were apparent throughout the EDA.
- 5.6.50 **M8 Foodpark Economic Development Area** comprises a cluster of food-related industries (McGhees Bakeries, Bernard Corrigan (seafood), Lomond Fine Foods, McQueen Dairies) and other businesses (Biffa waste management, Bricklink construction), in a range of medium to big box scales. Graham's Dairies, JP Foods and Booker Wholesale are all east of, but have all been excluded from, the M8 Foodpark EDA and the designation does not appear to be managed. There were no sites identified at 2023. There was one vacant unit accounting for less than 1% of the EDA floorspace recorded at 2023.
- 5.6.51 **Cowlairs Industrial Estate Economic Development Area** comprises a cluster of industrial buildings and yards around a major anchor (Morrison Bowmore Whisky) where investment is evident. South of the anchor is a large, effectively stand-alone, vacant site of 5.4 hectares. North of the anchor is a NHS decontamination building, and a cluster of detached industrial buildings accommodating Kelly Communication and Auld Valves amongst other businesses. There are properties and land to the west which offer potential boundary expansion (if not additional opportunities for business expansion). There was one vacant unit accounting for less than 2% of the EDA floorspace recorded at 2023.

Ward 17 to 20 – East Glasgow

- 5.6.52 **Atlas Industrial Estate Economic Development Area** comprises the City Building Training Academy, Royal Strathclyde Blindcraft Industries and Atlas Industrial Estate (City Property/Graham and Sibbald). There was one site accounting for 0.11 hectares identified at 2023 with land to the east of the EDA noted as having potential. Other notable occupiers included Simpac (packaging), North Precision Engineering, and Forrest Precision Engineering. The general appearance of the EDA was mixed with 22% of units, and 16% of floorspace, vacant.

- 5.6.53 **Petershill Road Economic Development Area** comprises 9 units of two industrial clusters, south of Petershill Road. Notable occupiers include City Building, Carrick Packaging, Carntyne Transport and SWGR (industrial supplies). No sites were recorded at 2023. A very large (25,800 square metre) vacant/derelict building dominates the character of the area and while not recorded as vacant by the Scottish Assessors Association at 2023, the tenant appears to have been in voluntary liquidation since 2021. As well as the large building there also appears to be yard space and ground which could potentially be developed. Outwith the EDA boundary, the Barmulloch TRA presents as available land adjoining to the east of the EDA. Notwithstanding the above, vacancy was recorded as 10% of units and under 2.5% of floorspace.
- 5.6.54 **Annick Street Industrial Estate Economic Development Area** is a bustling, self-contained industrial estate marketed by Colliers/Ryden. It has small to medium size units of a similar style and same age. Notable occupiers included Sally Salon Services, Ideal Textiles, and Shorterm. There were no sites identified at 2023. There is a Network Rail engineering facility to the north that was not included in the EDA boundary and a yard to the south (accessed from the EDA). Vacancy of around 15% for both units and floorspace was recorded at 2023.
- 5.6.55 **London Road/Carmyle Avenue Economic Development Area** is a linear industrial and business area on the south side of London Road. Comprises a series of managed areas focusing on different clusters of businesses. Direct access to the M74 from the west boundary where East Investment Park clusters a hotel, fast food outlets and car sales. After a physical break, London Road Trade Park clusters 5 trade counters to the east. East again is another on-off ramp to the M74 this time only going or coming from the east. The London Road Retail Park is next east, and is a relatively new addition, it is adjacent to a series of adjoining yards and industrial buildings, which includes Polypipe, leading to London Road Trading Estate, which hosts small to medium units, and beyond which is Ainscough Crane Hire and Mount Vernon rail station.
- 5.6.56 From the Retail Park to Ainscough Cranes a rail-line forms the rear boundary (south) beyond which is the Patersons Waste Recycling and landfill. This part of the EDA has 1 site identified at 2023 accounting for 6.6 hectares. The site was not accessible and appears integral to the Paterson operations. Only 1 unit and less than 1% of floorspace were recorded as vacant at 2023. Investment to prepare a new yard was evident at the site visit.

- 5.6.57 In terms of the surroundings and the EDA boundary there were some opportunities noted at the site visit. There appears to be a major business (RJ McLeod head office) that has not been included in the boundary and land to the north (Glasgow Gait) is vacant and adjacent. There is a builder's yard, truck storage yard, and vast car-sales area. In combination with the non-industrial and business uses that have been introduced, there appears to be justification for boundary changes to reflect changes in circumstance.
- 5.6.58 **Causewayside Street Economic Development Area** is a cluster of industrial and business uses either side of Causewayside Street. It includes Tollcross Industrial Estate (Galbraiths) and a cluster of vehicle repair operators. At 2023, there were no sites identified in the Industrial and Business Land supply, but there were 3 units accounting for under 12% of the EDA floorspace recorded as vacant.
- 5.6.59 **Westhorn/London Road Economic Development Area** is northwest of the John Dewar Whisky bottling plant and bonded warehousing which it was previously audited with but which the City Development Plan assigned as an Area of City-Wide Economic Importance. In effect it is three large buildings, some of which have been sub-divided. Kwikform (construction equipment) and formerly Clyde Recycling occupy buildings here. Vacancy at 2024 was 50% of units and 26% of floorspace. The EDA boundary excludes the Thistle Metals recycling site that adjoins the EDA and Celtic training ground which is due for redevelopment over the next few years.
- 5.6.60 **Baillieston Distribution Centre Economic Development Area** is a managed estate of the same name (M7 Real Estate Ltd/Fisher German) that appears to be performing very well. Buildings and environment appear in good condition. Notable occupiers included Cordia, Bishopsgate (distribution), Johnstone's Decorating Centre, and Caps Cases (packaging). There were no sites identified at 2023 and no vacancies.

Ward 22 - Dennistoun

- 5.6.61 **Petershill Road/St Rollox Economic Development Area** comprises a single large-scale user – the Royal Mail, Glasgow Mail Centre. Formerly the industrial and business location was larger and encompassed land to the north and west. This wider area was also audited and comprised a further 1,626 square metres of warehousing, workshops and garages of which 339 square metres were vacant at 2023. While there were no sites identified within the EDA boundary there did appear to be a vacant site south of the EDA boundary, and the now closed St Rollox Railway Works presents as an opportunity for redevelopment. To the west are other commercial big box operators including CostCo, Tesco, Lidl and Home Bargains and their associated, very large, car parking provision.

- 5.6.62 **Charles Street Economic Development Area** comprises a cluster of industrial and business uses north of Charles Street. It includes two marketed estates at Rosemount Business Park (small units of under 500 square metres) and 331 Charles Street (larger units). The EDA is also adjacent to the former Springburn Rail Depot which accounts for over 25,000 square metres of vacant floorspace alone. Elements of the estate would benefit from significant investment with the rail depot presenting as an opportunity to repurpose/reuse. 13% of units and 58% of floorspace were recorded as vacant at 2023.
- 5.6.63 **Blochairn Industrial Estate Economic Development Area** is the located east and west of the Blochairn (market) Area of City-Wide Economic Importance. The western part comprised a Glasgow City Council recycling facility and car sales business (Arnold Clark). It included one site of 1.25 hectares. The central part (ACWEI) includes Blochairn Market as well as Hancocks wholesalers, Van Vliet (flowers), and Dingbros. The eastern part comprised Glasgow Brickyard, Buildbase, a vehicle storage warehouse and the site of a former Gas Holder site. This part had one site of 21.66 hectares identified at 2023 although the bulk of the site had planning permission for a new prison. Land to the southeast of this large site is due for gas infrastructure decommissioning in due course and would potentially become available for industry and business uses. Overall (both EDA and ACWEI) there were 3 sites accounting for 23.54 hectares at 2023. 3 units were recorded as vacant accounting for less than 1% of the EDAs floorspace.
- 5.6.64 **Alexandra Parade Economic Development Area** comprises two multi-unit complexes (office and studio space) at Hanson Street Studios (WASPs_) and CityPark (Savills/CBRE), it also includes a mix of industrial units (Cormac Engineering, Sky, Dell, Scot JCB, Securicor) as well as some residential properties, shops and a supermarket (Co-op). There were no sites identified at 2023. Under 18% of units and under 20% of floorspace was recorded as vacant at 2023. The unmanaged areas would benefit from public realm investment building coherence and integration with adjoining uses.
- 5.6.65 **College Business Park/Wellpark Economic Development Area** is located in Ward 22 covering two distinct geographies (one of which is within the city centre as noted earlier in this report). The western part (within the city centre boundary part of Ward 9) is now commonly known as Collegelands and was subject to a [masterplan](#) in 2005 that has yet to be fully realised. Development to date has included office, hotel, student accommodation and multi-storey car parking. A [planning application](#) for the remaining plot within the EDA boundary had been submitted at March 2024. It was for a mix of uses that includes office space. The eastern element of the EDA is the Tennant's Wellpark Brewery facilities. One site of 1.11 hectares was identified at 2023. 25% of units and 7% of floorspace was recorded as vacant at 2023.

5.6.66 **Glenpark/Duke Street Economic Development Area** comprises Glenpark Industrial Estate (City Property/Graham and Sibbald), a cluster of other industrial buildings and yards, some live-work yards, and a major anchor (Hovis Bakery). Other notable occupiers include Noah Beers Limited, AS Scaffolding and Scottish Wholefoods Collective. There were 2 sites identified at 2023 accounting for 1.13 hectares but many of the buildings will need significant refurbishment or potentially demolition in order for them to positively contribute to net zero. These potential changes may in turn present additional land. There are also already yards and storage and underutilised spaces within the EDA boundary. There was also potential land surrounding the EDA – especially to the east. At 2023, 11% of units were identified as vacant accounting for 3% of floorspace.

Economic Development Area conclusions

5.6.67 The audit of the standard Economic Development Areas identifies a wide range of outcomes for locations across Glasgow. Some have seen recent change, some are continuing to experience long-term change, while others have remained broadly stable. Many of the locations have no identified land to provide opportunity for new business opportunities while others have reduced in scale through development of non-industrial uses. The broad conclusion is that they are not generating land at replacement level to maintain a healthy stock of industry and business land opportunities.

5.6.68 It will likely be beneficial to review the audit when developing policy. The evidence of recent changes, like the closure of Tollcross, indicates perhaps that a different approach to large single-user locations might be warranted. The audit has also sought to identify managed areas and their agents/landowners as well as notable occupiers for each location and it may be beneficial to use this information to develop an engagement strategy for the proposed plan that involves these potentially key actors.

5.7 Additional Actions – Potential Clusters

- 5.7.1 During the site visit process, three additional potential industrial and business locations were identified at Parkhouse Business Park, west of Balmore Road in the north of the city; Cairnbrook Industrial Estate in Easterhouse; and Glasgow Kelvin College – Springburn Campus and Flemington House.

Parkhouse Business Park

- 5.7.2 [Parkhouse Business Park](#) is the former headquarters of Scottish Water. It covers around 7 hectares in North Glasgow, west of Balmore Road. It is a family-run operation.
- 5.7.3 It currently provides a mix of warehouse, workshop and office accommodation. It also has an established link to the [film industry](#) able to accommodate extensive parking facilities for cars and operate as a unit base. There is on-site security and 24-hour CCTV. The site is electronically gated making it accessible 24 hours per day, 7 days per week.
- 5.7.4 The site appears to include a good range of businesses and a wide range of options for prospective businesses. It is physically close to Balmore Industrial Estate (to the northeast) and appears to be performing better than that recognised location.

Cairnbrook Industrial Estate

- 5.7.5 The estate is located on the west side of Cairnbrook Road in the Easterhouse area in the east end of Glasgow. The estate is managed by [City Property](#) and comprises terraced light industrial units with a mix of independent operators.
- 5.7.6 The estate is relatively small and would benefit from investment. There appears scope to extend into adjacent land and the estate is relatively close to the M8 motorway, which leads to the wider UK motorway network.
- 5.7.7 If added it would become the only economic development area in Ward 21, North East.

Glasgow Kelvin College – Springburn Campus and Flemington House

- 5.7.8 This area is located in the north of the city, either side of Flemington Street in Springburn.
- 5.7.9 The area comprises the [Glasgow Kelvin College Springburn Campus](#), [Flemington House Business Centre](#) (office and industrial space) and a very large Wholesale Foods warehousing complex. It also potentially includes a square, relatively flat brownfield site (0.78 hectares).
- 5.7.10 [Flemington House Business Centre](#) is the former headquarters of the North British Locomotive Company. The building is A Listed and has the scale to accommodate solo entrepreneurs, small and mid-size companies, freelancers and enterprises with offices from 150 to 1t,000 square feet.

5.8 Additional Actions – Previously identified Locations

- 5.8.1 During the audit process, eight former industrial and business locations were reviewed.
- 5.8.2 Three at **Burnfield Road, Springfield Road, Cardowan Street**, had been re-developed for housing; two at **Old Shettleston Road/Annick Street, Helen Street - south** had been re-developed for commercial uses; one at **Applecross** had been developed as a Local Nature Reserve with aspirations for housing in a canal-side plot; and two adjacent locations at **Port Dundas** and **Port Dundas Trading Estate** remained largely characterised by their industrial and business users and character despite their removal from the City Development Plan.
- 5.8.3 The south-western quarter of the **Port Dundas** location has a residential-led [masterplan](#) with the first new homes nearing completion at 2023. Much of the northern and eastern parts of the location appear to have continued to operate as an industrial and business location (managed variously as Craighall Business Park (DM Hall), [100 Borron Street](#) (also known as Port Dundas Business Park and managed by Igloo and Scottish Canals), and Port Dundas Trading Estate (Rutterford Ltd). This area has 3 sites accounting for 1.31 hectares recorded in the industrial and business land supply at 2023.
- 5.8.4 The location formerly recognised as **Port Dundas Industrial Estate** is to the south of the **Port Dundas** location and includes an area managed as Payne Street Flexible Workspace by Ryden. It appears as a functional industrial and business area with a mix of operators and with excellent access to the M8 motorway network.
- 5.8.5 Of the former industrial and business locations, **Port Dundas** and **Applecross** (both in the north of the city) were the only with notable unused land opportunities with the potential for additional development although **Helen Street – south, Old Shettleston Road/Annick Street** and **Port Dundas Industrial Estate** all included areas of vehicle storage.

6 Appendix A: Economic Development Areas Unit and Floorspace comparison

Reference	Ward	Economic Development Area Name	2023 Units	2023 Floorspace	2023 Vacant Units	2023 Vacant Floorspace	2023 % Vacant Units	2023 % Vacant Floorspace	2018 Units	2018 Floorspace	2018 Vacant Units	2018 Vacant Floorspace	2018 % Vacant Units	2018 % Vacant Floorspace	Difference Units	Difference Floorspace	Difference Vacant Units	Floorspace
1	1	Drakemire Drive	47	47,206	7	20,612	14.9%	43.7%	30	70,377	9	3,726	30.0%	5.3%	17	23,171	-2	16,886
2	1	Glenwood Business Park	65	5,197	13	1,109	20.0%	21.3%	63	5,346	10	649	15.9%	12.1%	2	-149	3	460
3	2	Pollokshaws	13	11,095	2	494	15.4%	4.4%	11	12,892	3	979	27.3%	7.6%	2	-1,797	-1	-485
4	2	Thornliebank Industrial Estate	41	61,328	1	285	2.4%	0.5%	37	59,014	3	7,378	8.1%	12.5%	4	2,314	-2	-7,093
5	3	Darnley Industrial Estate	38	18,033	1	589	2.6%	3.3%	36	34,278	2	107	5.6%	0.3%	2	16,245	-1	482
6	3	Darnley Mains	0	0	0	0	0	0										
7	3	South Nitshill Industrial Estate	23	30,663	6	751	26.1%	2.4%	23	14,802	8	1,976	34.8%	13.3%	0	15,861	-2	-1,225
8	4	Cardonald Park	18	45,043	0	0	0.0%	0.0%	17	45,538	1	2,112	5.9%	4.6%	1	-495	-1	-2,112
9	4	Hillington Industrial Estate	147	112,271	10	2,917	6.8%	2.6%	138	119,983	11	10,069	8.0%	8.4%	9	-7,712	-1	-7,152
10	5	Academy Park/ Gower Street	31	8,195	7	1,808	22.6%	22.1%	28	7,720	8	1,467	28.6%	19.0%	3	475	-1	341
11	5	Drumoyne Road/ Meiklewood Road	32	23,866	1	1,497	3.1%	6.3%	27	23,980	2	2,187	7.4%	9.1%	5	-114	-1	-690
12	5	Elderpark Workspace	60	7,144	19	2,145	31.7%	30.0%	59	7,144	19	1,436	32.2%	20.1%	1	0	0	709
13	5	Govan Road/Brand Street	129	39,971	9	2,999	7.0%	7.5%	117	39,929	10	356	8.5%	0.9%	12	42	-1	2,643
14	5	Helen Street/Loanbank Industrial Estate	97	105,934	7	6,963	7.2%	6.6%	87	107,588	11	8,560	12.6%	8.0%	10	-1,654	-4	-1,597
15	5	Kilbirnie Street	58	71,899	11	3,138	19.0%	4.4%	58	75,910	18	16,292	31.0%	21.5%	0	-4,011	-7	13,154
16	5	Kinning Park Industrial Estate	28	28,136	4	4,991	14.3%	17.7%	40	28,282	7	6,026	17.5%	21.3%	-12	-146	-3	-1,035
17	5	Moorpark	42	21,816	2	1,034	4.8%	4.7%	42	21,816	4	1,515	9.5%	6.9%	0	0	-2	-481
18	5	Pacific Quay	58	41,831	17	1,515	29.3%	3.6%	66	44,721	8	1,162	12.1%	2.6%	-8	-2,890	9	353
19	5	Queen Elizabeth University Hospital	15	366,675	0	0	0	0										
20	5	Scotland Street/Milnpark Street	182	64,732	47	10,957	25.8%	16.9%	145	63,538	21	5,781	14.5%	9.1%	37	1,194	26	5,176
21	5	Shieldhall	92	112,046	11	10,577	12.0%	9.4%	64	144,662	18	12,963	28.1%	9.0%	28	32,616	-7	-2,386

Reference	Ward	Economic Development Area Name	2023 Units	2023 Floorspace	2023 Vacant Units	2023 Vacant Floorspace	2023 % Vacant Units	2023 % Vacant Floorspace	2018 Units	2018 Floorspace	2018 Vacant Units	2018 Vacant Floorspace	2018 % Vacant Units	2018 % Vacant Floorspace	Difference Units	Difference Floorspace	Difference Vacant Units	Floorspace
22	5	Tradeston	95	30,142	8	1,098	8.4%	3.6%	24	23,121	4	1,541	16.7%	6.7%	71	7,021	4	-443
23	5	Vermont St/McLellan St/Kinning Park	94	99,161	7	1,219	7.4%	1.2%	86	99,605	19	22,711	22.1%	22.8%	8	-444	-12	21,492
24	5	Woodville Street	192	72,543	23	4,378	12.0%	6.0%	178	82,526	24	11,184	13.5%	13.6%	14	-9,983	-1	-6,806
25	6	Craigton Industrial Estate	22	21,487	5	1,237	22.7%	5.8%	20	24,983	5	6,358	25.0%	25.4%	2	-3,496	0	-5,121
26	7	Cathcart	1	57,167	0	0	0.0%	0.0%	2	78,256	1	21,089	50.0%	26.9%	-1	78,256	-1	21,089
27	7	New Victoria Hospital	1	43,202	0	0	0	0										
28	7	Polmadie	104	74,407	10	10,810	9.6%	14.5%	64	77,739	4	7,870	6.3%	10.1%	40	-3,332	6	2,940
29	8	Dixon's Blazes	206	102,035	5	214	2.4%	0.2%	53	97,112	3	6,697	5.7%	6.9%	153	4,923	2	-6,483
30	8	St Andrews Industrial Estate/Pollokshaws Road	8	13,351	0	0	0.0%	0.0%	7	15,257	2	6,436	28.6%	42.2%	1	-1,906	-2	-6,436
31	9	Brook St/Crownpoint Rd/London Rd	405	112,040	14	3,248	3.5%	2.9%	330	103,308	61	6,261	18.5%	6.1%	75	8,732	-47	-3,013
32	9	Nuneaton Street/London Road	97	53,286	11	1,325	11.3%	2.5%	90	55,493	12	2,256	13.3%	4.1%	7	-2,207	-1	-931
33	9	Swanston Street/Dalmarnock	182	55,299	58	21,404	31.9%	38.7%	221	65,829	65	37,304	29.4%	56.7%	-39	10,530	-7	15,900
34	9	Swanston Street/Dalmarnock (Area of Managed Change)																
35	10	City Centre																
36	10	Finnieston	48	59,930	4	4,251	8.3%	7.1%	55	52,381	10	2,935	18.2%	5.6%	-7	7,549	-6	1,316
37	10	Glasgow Caledonian University	1	91,686														
38	10	IFSD																
39	10	ITREZ																
40	10	Townhead/Cowcaddens																
41	10	University of Strathclyde	38	251,573	4	209	10.5%	0.0%										
42	11	Garscube Industrial Estate	23	19,473	0	0	0.0%	0.0%	23	21,887	4	2,526	17.4%	11.5%	0	-2,414	-4	-2,526
43	11	Oakbank Industrial Estate	31	8,681	4	483	12.9%	5.6%	27	8,900	4	1,983	14.8%	22.3%	4	-219	0	-1,500
44	11	University of Glasgow – Gilmourhill Campus	12	280,788	0	0	0	0										
45	11	University of Glasgow – St Andrews Building	1	12,960	0	0	0	0										
	12	[see Ward 13 South Street]																

Reference	Ward	Economic Development Area Name	2023 Units	2023 Floorspace	2023 Vacant Units	2023 Vacant Floorspace	2023 % Vacant Units	2023 % Vacant Floorspace	2018 Units	2018 Floorspace	2018 Vacant Units	2018 Vacant Floorspace	2018 % Vacant Units	2018 % Vacant Floorspace	Difference Units	Difference Floorspace	Difference Vacant Units	Floorspace
46	13	New Albion Industrial Estate	35	15,517	1	626	2.9%	4.0%	33	22,446	5	2,692	15.2%	12.0%	2	-6,929	-4	-2,066
47	13	South Street	233	190,498	23	7,369	9.9%	3.9%	188	188,466	33	10,933	17.6%	5.8%	45	2,032	-10	-3,564
48	14	Anniesland Industrial Estate	67	20,549	3	619	4.5%	3.0%	66	17,828	9	1,953	13.6%	11.0%	1	2,721	-6	-1,334
49	14	Drumchapel	143	64,195	20	2,448	14.0%	3.8%	133	63,612	5	351	3.8%	0.6%	10	583	15	2,097
50		Drumchapel (ACWEI)																
51	15	Chapel Street Industrial Estate	26	3,782	5	1,034	19.2%	27.3%	25	3,782	4	1,579	16.0%	41.8%	1	0	1	-545
52	15	Dalsholm Industrial Estate	17	26,967	4	421	23.5%	1.6%	17	19,801	2	162	11.8%	0.8%	0	7,166	2	259
53	15	Enterprise West Media Park	26	13,333	4	2,812	15.4%	21.1%	21	12,537	7	5,038	33.3%	40.2%	5	796	-3	-2,226
54	15	University of Glasgow – Garscube Campus	n/c	n/c	n/c	n/c	n/c	n/c										
55	15	West Of Scotland Science Park	74	35,670	3	331	4.1%	0.9%	77	6,557	8	1,207	10.4%	18.4%	-3	29,113	-5	-876
56	16	Balmore Industrial Estate	72	56,823	13	3,019	18.1%	5.3%	72	56,412	14	3,093	19.4%	5.5%	0	411	-1	-74
57	16	Cowlairs Industrial Estate	20	34,229	1	540	5.0%	1.6%	11	33,389	0	0	0.0%	0.0%	9	840	1	540
58	16	M8 Foodpark	38	20,120	1	84	2.6%	0.4%	32	20,370	0	0	0.0%	0.0%	6	-250	1	84
59	16	Possilpark Industrial Estate	46	60,738	1	2,302	2.2%	3.8%	46	48,207	5	12,263	10.9%	25.4%	0	12,531	-4	-9,961
60	16	Shuna Street/Shuna Place	17	9,255	4	4,282	23.5%	46.3%	41	13,532	25	6,956	61.0%	51.4%	-24	-4,277	-21	-2,674
61	17	Atlas Industrial Estate	32	24,275	7	3,810	21.9%	15.7%	31	22,713	11	6,877	35.5%	30.3%	1	1,562	-4	-3,067
62	17	Petershill Road	10	51,583	1	1,165	10.0%	2.3%	9	52,861	1	1,165	11.1%	2.2%	1	-1,278	0	0
63	17	Robroyston Business Park/Nova Technology Park	20	7,042	1	1,163	5.0%	16.5%	14	6,647	2	2,183	14.3%	32.8%	6	395	-1	-1,020
64	17	Stobhill Hospital	4	88,144	0	0	0	0										
65	18	Carntyne Industrial Estate	34	13,090	4	1,061	11.8%	8.1%	32	14,847	10	3,469	31.3%	23.4%	2	-1,757	-6	-2,408
66	19	Annick Street Industrial Estate	58	11,168	8	1,703	13.8%	15.3%	57	14,395	5	533	8.8%	3.7%	1	-3,227	3	1,170
67	19	Cambuslang Investment Park	220	234,023	21	11,106	9.5%	4.7%	185	210,770	34	5,945	18.4%	2.8%	35	23,253	-13	5,161
68	19	Causewayside Street	36	9,896	3	1,131	8.3%	11.4%	34	12,632	3	1,169	8.8%	9.3%	2	-2,736	0	-38
69	19	London Road/Carmyle Avenue	33	15,536	1	46	3.0%	0.3%	29	26,417	2	559	6.9%	2.1%	4	10,881	-1	-514

Reference	Ward	Economic Development Area Name	2023 Units	2023 Floorspace	2023 Vacant Units	2023 Vacant Floorspace	2023 % Vacant Units	2023 % Vacant Floorspace	2018 Units	2018 Floorspace	2018 Vacant Units	2018 Vacant Floorspace	2018 % Vacant Units	2018 % Vacant Floorspace	Difference Units	Difference Floorspace	Difference Vacant Units	Floorspace
70	19	Shettleston Road	66	16,243	8	637	12.1%	3.9%	63	36,681	7	19,378	11.1%	52.8%	3	-	1	-
71	19	Tollcross	1	45,851	1	45,851	100.0%	100.0%	1	45,851	0	0	0.0%	0.0%	0	0	1	45,851
72	19	Westhorn/London Road	12	98,864	5	1,738	41.7%	1.8%	12	98,864	3	1,468	25.0%	1.5%	0	0	2	270
73	20	Baillieston Distribution Centre	22	17,762	0	0	0.0%	0.0%	23	17,651	2	1,237	8.7%	7.0%	-1	111	-2	-1,237
74	20	Glasgow Business Park	81	57,251	13	2,103	16.0%	3.7%	76	47,279	17	5,544	22.4%	11.7%	5	9,972	-4	-3,441
75	20	Queenslie Industrial Estate	275	174,795	49	12,139	17.8%	6.9%	268	172,725	63	11,413	23.5%	6.6%	7	2,070	-14	726
	21	(no EDAs)																
76	22	Alexandra Parade	86	57,028	15	11,062	17.4%	19.4%	73	55,959	16	6,629	21.9%	11.8%	13	1,069	-1	4,433
77	22	Blochairn Industrial Estate	35	86,456	3	206	8.6%	0.2%	33	117,070	12	1,685	36.4%	1.4%	2	-	-9	-1,479
78	22	Blochairn Industrial Estate (ACWEI)																
79	22	Charles Street	45	46,235	6	26,723	13.3%	57.8%	45	52,778	12	2,889	26.7%	5.5%	0	-6,543	-6	23,834
80	22	College Business Park/Wellpark	53	9,839	13	702	24.5%	7.1%	50	64,661	10	473	20.0%	0.7%	3	-	3	229
81	22	Glenpark/Duke Street	45	30,579	5	889	11.1%	2.9%	40	31,903	3	384	7.5%	1.2%	5	-1,324	2	505
82	22	Petershill Road/St Rollox	1	20,867	0	0	0.0%	0.0%	1	20,867	0	0	0.0%	0.0%	0	0	0	0
83	22	Royal Infirmary Hospital	6	193,127	0	0	0	0										
84	23	Gartnavel Hospital	6	132,854	1	18.03	16%	0.0%										
		CP017 Port Dundas (masterplan area)																
		CP018 Port Dundas Trading Estate (operational)																
		CP032 Old Shettleston Road /Annick Street (Tesco)																
		CP055 Helen Street (south) (Asda)																
		CP062 Burnfield Road (housing)																
		CP069 Springfield Road (housing)																
		CP073 Cardowan Street (housing)																
		CP076 Applecross (LNR)																

