

2025

An abstract graphic featuring a dense cluster of green squares of various sizes and shades of green, radiating from the left side. A thick, curved band in two shades of green sweeps across the bottom of the page.

SCOTTISH BORDERS COUNCIL EMPLOYMENT LAND AUDIT

Employment Land Audit Report 2024-2025

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1. Report for the year 2024-2025

The base date for this audit is 1 April 2024 to 31 March 2025.

1.1. Land supply

1.1.1. The 2025 established employment land supply is 121.09 hectares (ha), comprising 63 sites. These sites can be viewed at the Employment Land Audit (ELA) [Web Map](#). Table 1 shows the annual change in employment land supply over the last five years (since 2021). The employment land supply has increased by 29.45ha since 2024, with the following noted changes.

1.1.2. Increase in employment land supply, including sites newly allocated in LDP2 (2024):

- Eshiels¹ site ES001 – new site (4.9ha)
- Galashiels site GA014 – new site (2.5ha)
- Greenlaw site GR005 – new site (1.17ha)
- Hawick site HA030 – new site (0.71ha)
- Hawick site HA031 – new site (5.04ha)
- Kelso site KE029 – new site (17.15ha)
- Westruther site WE001 – new site (0.76ha)
- Yetholm site YE001 – new site (0.93ha)
- Hawick site HA021 returned to supply (0.34ha)
- Hawick site HA032 created by amalgamating HA024 and HA028 and incorporating previously excluded land between the two sites (increase of 0.09ha).

1.1.3. Reduction in employment land supply due to development having taken place, sites being removed from the supply, or boundaries being adjusted:

- Coldstream site CO011 taken up (0.17ha)
- Coldstream site CO012 removed (0.35) as land has been developed as a balancing pond and SUDs for adjacent sites CO011 and CO008.
- Duns site DU002 and part of DU012 taken up (0.95ha)
- Eyemouth site EY014 taken up (1.08ha)
- Tweedbank site TW007 taken up (1.13ha)
- Greenlaw site GR001 removed from audit as it is allocated for mixed use development (see section 1.8) (0.35ha)
- Jedburgh site JE003 site area adjusted (0.12ha)

Table 1 Annual established employment land supply (ha)

2021	2022	2023	2024	2025	% change since 2024
98.9	95.4	91.76	91.64	121.09	32%

¹ For the purposes of the Employment Land Audit, the Eshiels site is included within the figures for Peebles.

- 1.1.4. Table 2 shows the established employment land supply by Housing Market Area (HMA). The boundaries of the HMAs can be viewed on the [ELA Web Map](#). The largest amount of employment land supply is within the Central Borders HMA (91.49ha), with no supply within the Southern HMA.

Table 2 Employment land supply by housing market area (ha)

HMA	Employment land supply (ha)
Berwickshire	21.14
Central	91.49
Northern	8.46
Southern	-
TOTAL	121.09

1.2. Site type

- 1.2.1. Business and Industrial Land is classified by site type within Policy ED1 of the Local Development Plan 2024, namely “High Amenity Business Sites” and “Business and Industrial Sites”.
- 1.2.2. Table 3 sets out a breakdown of the business and industrial land supply by site type per HMA and settlement.

Table 3 Employment land supply by site type (ha and number of sites)

HMA	Settlement	Business & Industrial		High Amenity Business Sites	
		HA	No. sites	HA	No. sites
Berwickshire	CHIRNSIDE	0.65	1	-	-
	COLDSTREAM	6.84	2	-	-
	DUNS	4.73	4	-	-
	EYEMOUTH	6.70	4	-	-
	GREENLAW	1.46	2	-	-
	WESTRUTHER	0.76	1	-	-
	AREA TOTAL	21.14	14	-	-
Central	EARLSTON	4.84	2	-	-
	GALASHIELS	5.54	3	-	-
	HAWICK	13.87	9	5.04	1
	JEDBURGH	6.94	4	-	-
	KELSO	4.1	5	17.15	1
	MOREBATTLE	0.63	1	-	-
	NEWTOWN ST BOSWELLS	-	-	12.77	1
	SELKIRK	1.41	4	1.13	2
	ST BOSWELLS (CHARLESFIELD)	13.64	6	-	-
	TWEEDBANK	2.02	2	1.48	2
	YETHOLM	0.93	1	-	-
	AREA TOTAL	53.92	37	37.57	7
Northern	INNERLEITHEN	0.4	1	-	-
	LAUDER	1.76	1	-	-
	PEEBLES	5.65	2	-	-
	WEST LINTON	0.65	1	-	-
	AREA TOTAL	8.46	5	-	-
Southern		-	-	-	-
	AREA TOTAL	-	-	-	-
Scottish Borders	OVERALL TOTAL	83.52	56	37.57	7

Key findings

- Overall, 69% of the employment land supply area is made up of Business & Industrial type sites; 31% comprises High Amenity Business Sites.
- In terms of number of sites, 89% of sites are classified as Business & Industrial, 11% are High Amenity Business Sites.
- All High Amenity Business Sites are within the Central Borders HMA, making up 41% of the Central Borders supply, and 16% of available sites in the Central Borders HMA.
- 76% of the total employment land supply is in the Central Borders HMA, comprising 70% of the total number of sites.
- Berwickshire contains 17% of employment land supply (22% of sites) and Northern Borders contains 7% (8% of sites).
- There is no employment land supply in the Southern Borders HMA.

1.3. Site size

1.3.1. Table 4 provides a breakdown of employment land supply according to three site size categories: 0-1ha, 1-5ha, and >5ha.

Table 4 Number of sites by site size

HMA	Settlement	0-1ha	1-5ha	>5ha
Berwickshire	CHIRNSIDE	1	-	-
	COLDSTREAM	1	-	1
	DUNS	3	1	-
	EYEMOUTH	3	-	1
	GREENLAW	1	1	-
	WESTRUTHER	1	-	-
	AREA TOTAL	10	2	2
Central	EARLSTON	1	1	-
	GALASHIELS	1	2	-
	HAWICK	6	2	2
	JEDBURGH	2	2	-
	KELSO	4	1	1
	MOREBATTLE	1	-	-
	NEWTOWN ST BOSWELLS	-	-	1
	SELKIRK	6	-	-
	ST BOSWELLS (CHARLESFIELD)	4	1	1
	TWEEDBANK	3	1	-
	YETHOLM	1	-	-
	AREA TOTAL	29	10	5
Northern	INNERLEITHEN	1	-	-
	LAUDER	-	1	-
	PEEBLES	1	1	-
	WEST LINTON	1	-	-
	AREA TOTAL	3	2	-
Southern		-	-	-
	AREA TOTAL	-	-	-
Scottish Borders	OVERALL TOTAL	42	14	7

Key findings

- 67% of all employment land sites are less than 1ha in size; however, this represents just 16% of the overall land supply (19.61ha).
- Sites between 1-5ha make up 22% of sites and 33% of the overall land supply.
- There are seven large sites (greater than 5ha), making up 11% of all employment land sites, and 51% of the overall land supply. These sites are in Berwickshire (Coldstream and Eyemouth), and Central (Hawick, Kelso, Newtown St Boswells, and St Boswells).
- The Berwickshire and Central HMAs have a range of site sizes available, including larger sites with an area greater than 5ha.
- The Northern HMA has a more limited range of employment sites, with no sites over 5ha. There are three available sites sized 0-1ha, and two available sites sized 1-5ha.

1.4. Availability

1.4.1. The availability of sites is divided into the following categories: immediate, one to five years, beyond five years, and under construction. The definitions of these categories are set out within the Glossary.

1.4.2. Table 5 sets out the availability of land by area in each settlement.

Table 5 Availability of Employment Land Supply (ha)

HMA	Settlement	Availability			
		Immediate	1-5 years	Beyond 5 years	Under construction
Berwickshire	CHIRNSIDE	0.65	-	-	-
	COLDSTREAM	6.70	0.14	-	-
	DUNS	4.19	0.54	-	-
	EYEMOUTH	5.89	-	0.81	-
	GREENLAW	-	0.29	1.17	-
	WESTRUTHER	-	-	0.76	-
	AREA TOTAL	17.43	0.97	2.74	-
Central	EARLSTON	0.21	-	4.63	-
	GALASHIELS	0.45	2.50	2.59	-
	HAWICK	0.72	13.01	5.01	0.18
	JEDBURGH	0.72	4.95	1.27	-
	KELSO	0.90	20.35	-	-
	MOREBATTLE	-	0.63	-	-
	NEWTOWN ST BOSWELLS	-	12.77	-	-
	SELKIRK	1.46	1.08	-	-
	ST BOSWELLS (CHARLESFIED)	10.69	2.95	-	-
	TWEEDBANK	1.39	0.62	-	1.49
	YETHOLM	-	-	0.93	-
	AREA TOTAL	16.53	58.86	14.43	1.67
Northern	INNERLEITHEN	0.40	-	-	-
	LAUDER	1.76	-	-	-
	PEEBLES	-	5.65	-	-
	WEST LINTON	-	0.65	-	-
	AREA TOTAL	2.16	6.30	-	-
Southern	-	-	-	-	-
	AREA TOTAL	-	-	-	-
Scottish Borders	OVERALL TOTAL²	36.12	66.13	17.18	1.67

² Note: totals do not exactly align due to rounding.

Key findings

- 48% (17.43ha) of immediately available land is within the Berwickshire HMA, and 46% (16.53ha) in the Central area. There are 2.16ha (10%) of immediately available employment land within the Norther area.
- Across the Scottish Borders, 36.12ha of land is immediately available, and 66.13ha are available within 1-5 years.
- 1.67ha is under construction, comprising two sites, in Hawick and Tweedbank.

1.5. Immediately available land

1.5.1. There are 26 immediately available sites, representing 36.12ha (30%) of the total employment land supply. Two immediately available sites are classed as High Amenity Business Sites (Table 7). The remaining immediately available sites are Business and Industrial sites (Table 8).

Table 6 Immediately available High Amenity Business sites

Site Ref.	Site Name	Settlement	HMA	Area (ha)
SE020	Riverside 6 - North of the Yarn Store	Selkirk	Central Borders	0.68
TW004	Tweedside Park - Scottish Borders Council	Tweedbank	Central Borders	0.86

Table 7 Immediately available Business and Industrial sites

Site Ref.	Site Name	Settlement	HMA	Area (ha)
Berwickshire				
CH001	Southfield	Chirnside	Berwickshire	0.65
CO008	Lennel Mount North	Coldstream	Berwickshire	6.70
DU011	Duns Industrial Estate 17	Duns	Berwickshire	3.90
DU014	Duns Industrial Estate 13	Duns	Berwickshire	0.30
EY007	Gunsgreenhill	Eyemouth	Berwickshire	5.43
EY008	Gunsgreen Industrial Estate 1	Eyemouth	Berwickshire	0.27
EY013	Acredale 3	Eyemouth	Berwickshire	0.19
Central Borders				
EA001	Mill Road 1	Earlston	Central Borders	0.21
GA012	Netherdale Estate South	Galashiels	Central Borders	0.45
HA014	Galalaw, zEL60	Hawick	Central Borders	0.72
JE003	Land North of Industrial Estate	Jedburgh	Central Borders	0.63
JE015	Wildcat Wood & Extension (Plot 3)	Jedburgh	Central Borders	0.09
KE006	Part of Pinnaclehill/Spylaw Road VI	Kelso	Central Borders	0.21
KE022	South Pinnaclehill - Plot 10	Kelso	Central Borders	0.20
KE023	South Pinnaclehill - Plot 1	Kelso	Central Borders	0.26
KE026	South Pinnaclehill - Plot 4	Kelso	Central Borders	0.23
SE014	Tweed Mill Site (undeveloped part)	Selkirk	Central Borders	0.15
SE017	Riverside 5 – Former playing field	Selkirk	Central Borders	0.50
SE018	Land North West of the Weaving Shed	Selkirk	Central Borders	0.14
CF002	Charlesfield Extension I	St Boswells	Central Borders	9.51
CF015	Charlesfield Extension III	St Boswells	Central Borders	1.17
TW009	Former Eildon Mill	Tweedbank	Central Borders	0.53
Northern				
IN002	Traquair Road East	Innerleithen	Northern	0.40
LA002	North Lauder Industrial Estate	Lauder	Northern	1.76

Key findings

- The majority (77%) of immediately available sites are less than 1ha in size.
- There are only three sites greater than 5ha immediately available.
- 65% of all immediately available sites are in the Central area, at sites in Earlston, Galashiels, Hawick, Jedburgh, Kelso, Selkirk, St Boswells (Charlesfield), Tweedbank.
- There are seven immediately available sites in Berwickshire (Chirnside, Coldstream, Duns, and Eyemouth) and two in the Northern area (Innerleithen and Lauder).

1.6. Site servicing

- 1.6.1. The audit classifies sites as either serviced, partially serviced, or not serviced. This categorisation is based on availability of services such as electricity, water supply, and roads access. The Methodology provides further information in respect of the assessment of site servicing.
- 1.6.2. Table 9 sets out the employment land supply according to servicing classification and area. It shows that most of the employment land supply is currently not serviced (55.64ha / 45%). 42.19ha (35%) is partially serviced and 23.90ha (20%) is fully serviced.

Table 8 Employment land supply by servicing status (ha)

HMA	Settlement	Serviced	Partially serviced	Not serviced
Berwickshire	CHIRNSIDE	0.65	-	-
	COLDSTREAM	0.14	6.70	-
	DUNS	0.30	3.97	0.47
	EYEMOUTH	0.46	5.43	0.81
	GREENLAW	-	0.29	1.17
	WESTRUTHER	-	0.76	-
	AREA TOTAL	1.54	17.15	2.45
Central	EARLSTON	-	0.21	4.63
	GALASHIELS	2.95	2.59	-
	HAWICK	1.24	2.92	14.76
	JEDBURGH	0.72	1.27	4.95
	KELSO	0.90	-	20.35
	MOREBATTLE	-	-	0.63
	NEWTOWN ST BOSWELLS	12.77	-	-
	SELKIRK	0.64	1.90	-
	ST BOSWELLS (CHARLESFIELD)	-	13.64	-
	TWEEDBANK	1.39	2.11	-
	YETHOLM	-	-	0.93
	AREA TOTAL	20.61	24.64	46.24
Northern	INNERLEITHEN	-	0.40	-
	LAUDER	1.76	-	-
	PEEBLES	-	-	5.65
	WEST LINTON	-	-	0.65
	AREA TOTAL	1.76	0.40	6.30
Southern		-	-	-
	AREA TOTAL	-	-	-
Scottish Borders	OVERALL TOTAL	23.90	42.19	54.99

1.7. Take-up of employment land

- 1.7.1. Employment land take-up for this audit refers to the total area of employment land which has taken place between 1 April 2024 and 31 March 2025. There have been no windfall employment developments recorded, as set out within section 1.8 of this report.
- 1.7.2. Table 10 lists the employment sites taken up during this period. These sites can be viewed on the [ELA Web Map](#). The level of take up is higher than in the previous year, with a total of 3.33ha taken up (compared to 0.43ha in the year 2023-24).

Table 9 Employment land take-up (1 April 2024 to 31 March 2025)

Site Ref.	Site name	Settlement	Site Area (ha)
CO011	Lennel Mount North	Coldstream	0.17
DU002	Duns Industrial Estate 2	Duns	0.95
EY014	Acredale 4	Eyemouth	1.08
TW007	Site north of A6091	Tweedbank	1.13
TOTAL			3.33

Take-up since 2021

- 1.7.3. Table 11 shows the take-up in established land supply over the last 5 years. Overall, 8.86ha have been taken up since 2021, equivalent to an annual take-up rate of approximately 1.97ha per year. Figure 1 shows trends in take-up in relation to supply since 2021.

Table 10 Take-up in established land supply 2021-2025

HMA	Settlement	2021	2022	2023	2024	2025
Berwickshire	COLDSTREAM	0.12	-	-	-	0.17
	DUNS	0.20	-	-	-	0.95
	EYEMOUTH	0.17	0.83	1.18	-	1.08
	AREA TOTAL	0.29	0.83	1.18	-	2.20
Central	GALASHIELS	-	0.22	-	-	-
	HAWICK	-	-	-	0.24	-
	JEDBURGH	-	0.15	0.25	-	-
	KELSO	0.88	0.85	-	-	-
	SELKIRK	-	-	-	0.20	-
	TWEEDBANK	-	-	0.99	-	1.13
	AREA TOTAL	0.88	1.22	1.24	0.43	1.13
Northern	LAUDER	-	0.43	-	-	-
	AREA TOTAL	-	0.43	-	-	-
Southern		-	-	-	-	-
	AREA TOTAL	-	-	-	-	-
Scottish Borders	OVERALL TOTAL	1.17	2.48	2.42	0.43³	3.33

³ Note: 2024 figure corrected in this table to address adding error in previous report.



Figure 1 Annual employment land supply and take-up 2021-2025

1.8. Mixed-use sites

1.8.1. Sites allocated for mixed use have not been included in this report. As the specific site area to be incorporated for business and industrial use within mixed use sites is not always specified, including them in the overall employment land supply would risk double counting with other land uses such as housing and retail. Table 12 sets out the mixed-use sites allocated in LDP2 which require the inclusion of an element of employment land use.

Table 11 Mixed Use sites including requirement for an element of business and industrial use

Site Ref.	Site name	Settlement	HMA	Site Area (ha)
MCARD006	North of Horsburgh Bridge	Cardrona	Northern	1.9
MEYEM001	Gunsgreen Mixed Use	Eyemouth	Berwickshire	6.1
MGREE003	Former Extension to Duns Road Industrial Estate	Greenlaw	Berwickshire	0.4
MINNE001	Caerlee Mill	Innerleithen	Northern	1.5
MINNE003	Land West of Innerleithen	Innerleithen	Northern	6.8
MPEEB007	March Street Mill	Peebles	Northern	2.3
MTWEE002	Lowood	Tweedbank	Central	33.9

1.9. Windfall Development

- 1.9.1. Windfall employment developments are business and industrial developments on land which does not form part of the employment land supply (e.g. on “white land”). These developments are also an indicator of potential demand for employment land in addition to the take-up of employment land. Windfall employment developments should be Use Class 4, 5, or 6 new-build or conversion developments which occur on land not previously in active, existing business or industrial use.
- 1.9.2. There were no windfall employment developments completed between 1 April 2024 and 31 March 2025.

2. Overarching findings and conclusions

- 2.1.1. The overall established employment land supply has increased to 121.09ha since the previous 2024 audit (91.46ha). Four sites were taken up in the last year, resulting in an overall take-up of 3.33ha of employment land. Eight new sites were added to the supply, having been allocated in LDP2 (2024), one previously taken-up site was returned to supply, and one new site was created by amalgamating two previously separate sites and the boundary adjusted. Two sites were removed from the audit (CO012 removed as it is in use as SuDS, and GR001 removed as it is a mixed use site) and 0.82ha was removed as a result of minor boundary corrections. Overall, these changes represent an increase of 29.45ha in employment land supply in 2024-25.
- 2.1.2. This Employment Land Audit (2024/25) is the first to take account of the adoption of the Scottish Borders Local Development Plan 2 (2024). New business and industrial sites have been allocated in Eshiels, Galashiels, Greenlaw, Hawick, Kelso, Westruther and Yetholm. These sites have been allocated to account for a shortfall being identified in these areas.
- 2.1.3. All but one of these new sites are currently not serviced, and one is partially serviced. Funding and delivery mechanisms are required to ensure sites are fully serviced and are readily available for use. Sites allocated for specific uses should continue to be safeguarded although further flexibility is allowed within LDP2 policy, where appropriate, to ensure adequate opportunities for businesses seeking to set up.