

Moray Council

DRAFT State of the Environment Report

December 2017

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Introduction

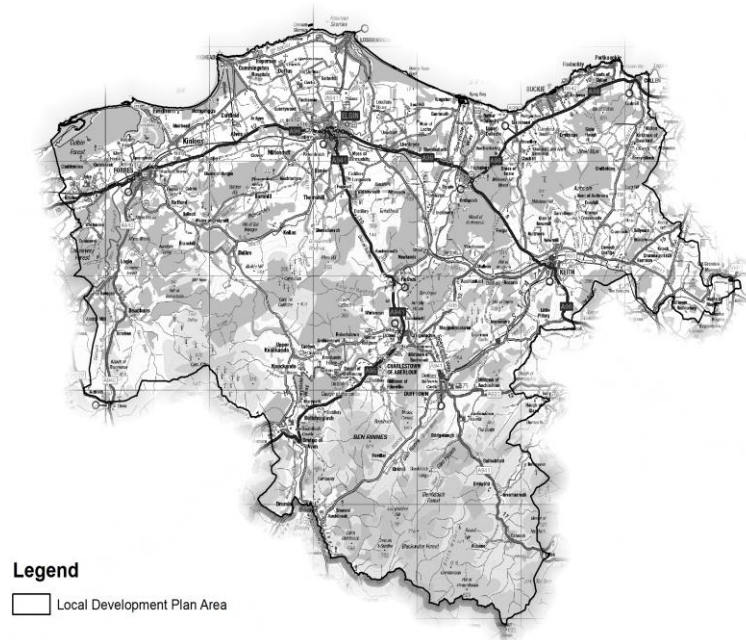
The State of the Environment Report for Moray provides a concise description of the current condition of its environment. The report identifies current and potential pressures that need to be considered in decision making and provides an environmental baseline for the Moray Local Development Plan (LDP) and its Strategic Environmental Assessment.

Located between Aberdeen and Inverness in the north-east of Scotland, Moray is 2,237km² in area from the Cairngorm Mountains in the south to the coast of the Moray Firth in the north. The part of Moray covered by the Cairngorm National Park is subject to its own State of the Environment Report and LDP.

Moray benefits from a very diverse, high quality environment, with much of the land in open moorland, woodland and agricultural use. The quality of the environment is reflected in the range and number of international, national and local natural and historic heritage designations.

This report, which will provide a review of the baseline resource and analysis of the health of the environmental assets in Moray, is divided into five sections looking at statistics regarding:-

- Water Environment;
- Biodiversity;
- Landscape;
- Cultural Heritage; and
- Communities and Infrastructure.



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Map 1: Moray Local Development Plan Area

Water Environment

Moray's water environment is of fundamental importance to all forms of life and ecosystems in the area and, as such, it must be protected and managed to ensure it continues to be healthy, safe and sustainable. There are a range of problems which threaten the water environment, both in Moray and Scotland, including non-point (i.e. rainfall and surface runoff) and point (via a pipeline) source pollution, alterations to river beds, banks and shores, alterations to water levels and flows and the presence of invasive non-native species.

Water Bodies

To measure pressures and their potential effects, the Scottish Environment Protection Agency (SEPA) use an aquatic classification system which covers rivers, lochs, estuaries, coastal and groundwater bodies. These are then split into management units call water bodies, which have a classification for each. Surface water bodies are classified using a system of five quality classes - high, good, moderate, poor and bad, whilst groundwater is classified as either good or poor.

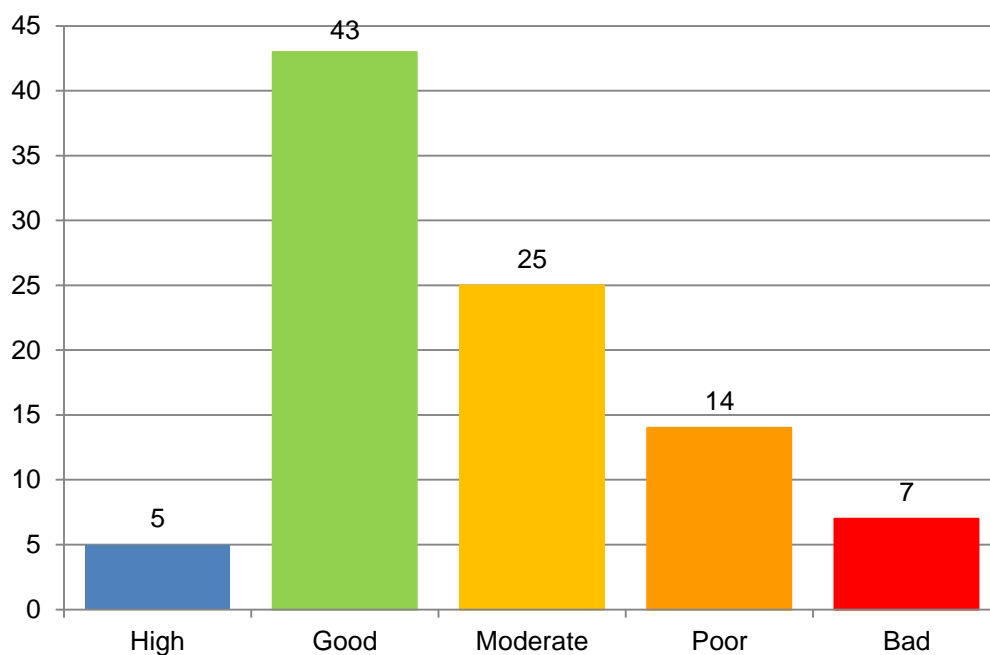


Figure 1 – Number of Water Bodies at Each Classification (SEPA 2016)

In 2016, 51.1% of the 94 waterbodies in Moray were classed as High or Good. Two waterbodies had their classifications of water quality reviewed. The Black Burn went from Moderate to Good because the invertebrate parameter (a Water Framework Directive (WFD) standard) improved from Moderate to High.

The River Spey – R. Fiddich to Tidal Limit was downgraded from Good to Moderate due to hydrology low flows and hydromorphology (the physical characteristics of the shape, boundaries and content of a water body) being demoted.

The Water Environment and Water Services (Scotland) Act 2003 places importance on surface and groundwater quality and any activity that may pollute watercourses is regulated by SEPA. Compared against environmental standards set out in the WFD, approximately 40 % of Scottish water bodies are at risk of failing to meet standards.

The quality of rivers is managed and monitored by SEPA who, as a result of the EU WFD, carry this forward through 'River Basin Management Planning'. Further information on River Basin Management Planning can be found at <https://www.sepa.org.uk/environment/water/river-basin-management-planning/>

The main rivers within Moray are:-

- River Spey
- River Lossie;
- River Isla;
- River Findhorn;
- River Avon; and
- River Deveron.

River flow and catchment information can be found at the National River Flow Archive (<http://nrfa.ceh.ac.uk/>). Gauging stations within Moray are detailed below with links to summaries of flow information.

Ref.	Gauging Station	River	Mean Flow (m3/s)
7002	Forres	Findhorn	19.766
7003	Sheriffmills	Lossie	2.723
7005	Dunphail	Divie	2.903
7006	Torwinny	Lossie	0.377
7009	Wardend Bridge	Mosset Burn	0.333
8001	Aberlour	Spey	56.354
8004	Delnashaugh	Avon	14.751
8006	Boat o Brig	Spey	65.929
9003	Grange	Isla	2.823
9006	Cullen	Deskford Burn	0.573

Figure 2 – River Gauging Stations within Moray

Within Moray, there are also various bodies of standing water including:-

- Loch Dallas;
- Lochindorb;
- Glenlatterach Reservoir;
- Clunas Reservoir; and
- Loch Spynie.

A number of waterbodies within Moray are designated protected areas and these are identified in Appendix 1 and addressed in more detail in the section 'Biodiversity'.

In order to protect human health and living resources from pollution to surface waters and groundwater, caused by nitrate from agricultural sources, Nitrate Vulnerable Zones (NVZs) have been identified in Scotland. Parts of Moray are covered by the Moray, Aberdeenshire, Banff and Buchan NVZ

(<http://www.gov.scot/Resource/0049/00490701.pdf>). SEPA monitor and regulate nitrate concentrations in surface and groundwaters on behalf of the Scottish Government.

Flooding and Surface Water Management

Despite having a relatively low annual rainfall of 672.7mm, in comparison to an average 1571mm in Scotland, Moray has a history of serious flooding incidents, particularly affecting Elgin, Forres, Rothes, Garmouth and Kingston. Flood Alleviation Schemes (FAS) have been completed for Elgin, Forres (Burn of Mosset), Forres (River Findhorn & Pilmuir), Lhanbryde, Newmill and Rothes. A FAS is currently under construction for Dallas. More information on Moray's FAS can be found at http://www.moray.gov.uk/moray_standard/page_80332.html

The Council are developing a technical guidance on Flood Risk and Drainage Impact Assessment for new developments which aims to wants to steer new development away from areas at risk of flooding by requiring developers to consider, at an early stage in the planning process, the susceptibility of their development to flooding and the impact it would have on flood risk elsewhere. Flood risk assessments will be required to be signed off by competent professionals.

Surface water flooding is experienced throughout Moray and the Council, SEPA and Scottish Water are developing Surface Water Management Plans with the objective, by 2027, to:-

- Reduce the number of properties at risk from surface water flooding;
- Reduce the annual average damage caused by surface water flooding; and
- Maximise the number of people registered with Floodline.

Implementing options for the management of surface water flood risk, Surface Water Management Plans are being developed for Aberlour & Rothes, Buckie, Elgin, Forres and Keith.

Development pressure on flood plains continues and the Council have worked closely with SEPA in determining planning applications where flooding may be an issue.

Coastal Erosion

The National Coastal Change Assessment (NCCA), commissioned by the Scottish Government, was published in August 2017. Aimed at informing strategic planning, the NCCA establishes historic coastal change and compares it to both 1970s and current coastal positions to determine past erosion/accretion rates.

Since the 1970s, the NCCA states that “12% of the soft coast length across Scotland has retreated landwards (erosion), 11% has advanced seawards (accretion) and 77% stable or has shown insignificant change”.

Moray’s coast falls within Cell 3: Cairnbulg Point to Duncansby Head, which has seen a substantial increase in the rate of erosion with the fastest rates affecting 11% of the retreating shore. Accretion rates remain the same with 9% of the advancing shore now affected.

Combined threats by the River Spey and Spey Bay have seen erosion becoming more common in the Moray Firth and “given the energetic nature of the bay and river, it is likely that the dynamism will continue for the foreseeable future”.

Implications for the LDP:-

- Develop guidance to improve the design and implementation of developments with regard to flood risk and drainage;
- Need to review coastal designations to take account of projected coastal erosion;
- Need to review policies to ensure coastal erosion issues are embedded in policy;
- Need to review policy on Development Proposals in Flood Risk Areas;
- Need to reflect Flood Alleviation Schemes within settlement statements;
- Need to review designations in light of latest flood risk data and areas safeguarded through Alleviation Schemes; and
- Promote green corridors and environmental improvement opportunities in association with Flood Alleviation Schemes.

Biodiversity

Moray benefits from a wealth of natural heritage and areas of importance to nature conservation. The challenges facing biodiversity in Moray are similar to those across Scotland. Moray's use of land and natural resources support our economy through agriculture, forestry, fisheries, tourism and sporting estates. Biodiversity is crucial to attracting investment and marketing of our food and drink and adds variety to our urban green spaces and contributes hugely to our health and wellbeing.

All development must be sustainable and offer habitats and species resilience against the impacts of climate change, pollution and invasive species. Habitat loss threatens biodiversity, but habitats can be re-established and enhanced through development and land management. It is important going forward that biodiversity becomes embedded in new development and the wide range of benefits it can provide realised.

All public sector bodies have a duty to further the conservation of biodiversity. The Moray Council Report on Biodiversity Duty 2011-2014 can be accessed here <http://www.moray.gov.uk/downloads/file96715.pdf>

The report identifies future actions to mainstream biodiversity into the Council's services including the Moray LDP. The next report is due on 1 January 2018.

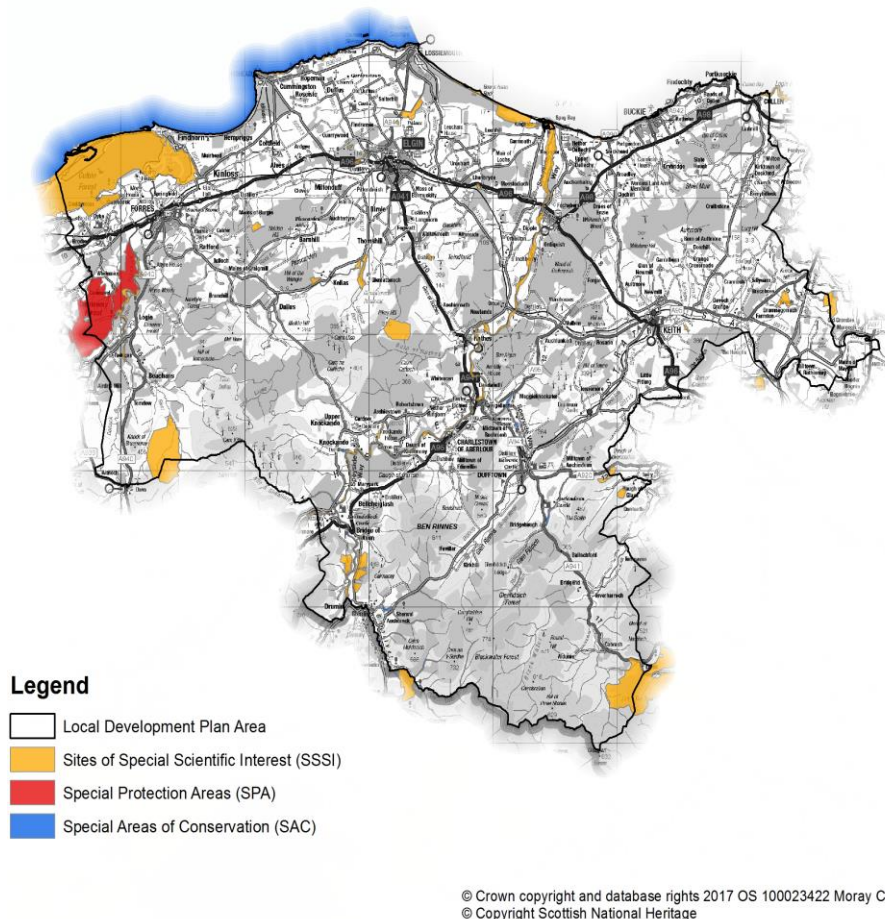
Protected Sites

Protected areas and habitats – also known as designated sites – can be assigned to help ensure natural features of special interest remain in good health to be enjoyed by all, both now and in the future. In Moray, there are 48 sites that are protected by local needs and interests, domestic legislation and policy or international directives. More detail on these sites can be found in Appendix 1. Information on qualifying interests of, and the pressures of development on, Special Area of Conservation (SAC) and Special Protected Areas (SPA) can be found in Appendix 2.

Designation	Number of Sites
Local Nature Reserve	1
Ramsar Site	2
Special Area of Conservation	7
Special Protected Areas	5
Sites of Special Scientific Interest	36

Figure 3 – Designations of Protected Sites in Moray

The LDP has a number of safeguarding policies, in particular Policy E1 *Natura 2000 Sites and National Nature Conservation Sites*, which aims to protect designated sites of international and national nature conservation value from inappropriate development.



Map 2 – Protected Sites in Moray

Protected Species

Moray is home to a number of iconic species including red squirrels, bottlenose dolphins, badgers and bats. These species can be adversely impacted by development and policies are required to safeguard the species and their habitats.

Policy ER3 *Protected Species* ensures that proposals will not have an adverse impact on European protected species and nationally protected species of bird. Applicants are required to submit supporting information demonstrating both the need for the development and that a full range of possible alternative courses of action have been fully considered.

Lichens

The lichen assemblage is a feature of the Culbin Sands, Culbin Forest and Findhorn Bay Site of Special Scientific Interest (SSSI) and Findhorn Dunes is an established site of National Importance for lichens. In 2008, a lichen study was undertaken on the Dunes and 130 lichens were recorded from pebbles, sandy soils, heather and/or pine. There were 5 nationally rare and 18 nationally scarce species of lichens recorded as being present on Findhorn Dunes, including 1 species listed as Endangered, 1 as Vulnerable, 1 as Near Threatened and 2 species listed as Data Deficient.

Pressure from forestry operations, invasive species and recreational disturbance is putting the lichen communities under threat and stability and protection of habitats is required to ensure lichens continue to thrive on the dunes.

Pollinating Insects

Pressures such as land use change, pesticides, pollution, disease and climate change has seen the number of pollinating insects in Scotland – including honey bees, bumble bees and butterflies – declined by an estimated 51% since 1980. This has led to fears of a negative impact on agriculture, food security, health and wellbeing and the economy. As a result, Scottish Natural Heritage has, in conjunction with environmental and land management organisations, developed a Pollinator Strategy for Scotland 2017-2027 and Implementation Plan. The Strategy aims to address the causes of decline in populations, diversity and range of native pollinator species and assist them to thrive in the future.

Local authorities are encouraged to apply the principles of Integrated Pest Management (IPM) in ground maintenance and management and produce and implement local pollinator plans to protect and enhance pollinator habitats.

Woodland

Moray has a high percentage of forestry cover at 33% of the total land area which equates to a forested area of approximately 62,441 hectares. In August 2017, the Council agreed a Moray Woodland & Forestry Strategy which identifies the key issues affecting forestry in Moray, highlights the opportunities that exist across the sector, increases the profile of current activities and guides woodland creation to appropriate locations over the next 20 years.

To address tree disease, including dothistroma needle blight, the Moray Woodland & Forestry Strategy encourages a greater diversity of tree species and management practices. The Strategy will ensure that new woodland creation and restructuring proposals are resilient to the negative effects of climate change and tree disease and encourages woodland and forest managers to be prepared to adapt to these threats.

In 2009, the Council introduced a Control of Woodland Removal Policy aimed at reducing woodland loss associated with development. A review of the Policy in 2014 by Forestry Commission Scotland found a loss of approximately 60ha of woodland to around 180 developments with no compensatory planting offered. A further review in 2017 found a reduction to a 5ha loss, equating to a 92% reduction in yearly woodland loss between 2014 and 2017. The policy requires applicants to provide on or off site compensatory planting or to provide a commuted sum to the Council to plant trees off site.

Open Spaces

The Council approved Open Space Strategy Supplementary Guidance in 2017 which sets out a strategic vision for protecting, enhancing and managing publicly usable open space in Moray. This includes spaces such as public parks, play spaces, sports areas, woodlands and green corridors. The guidance will be used when making planning decisions related to open space and assist in promoting and enhancing biodiversity in new developments.

The total open space audited as part of the Strategy was approximately 1632ha over 226 sites. A large proportion of this is woodland and Natural/Semi Natural spaces which lie on the edge of settlements. Overall, the towns audited have large areas of Natural/Semi Natural open space with this making up almost 70% of the open space in terms of area; however, this only makes up around 25% of the number of sites audited. In terms of quality, 77% of the sites audited were found to be of good quality or above.

Implications for LDP:-

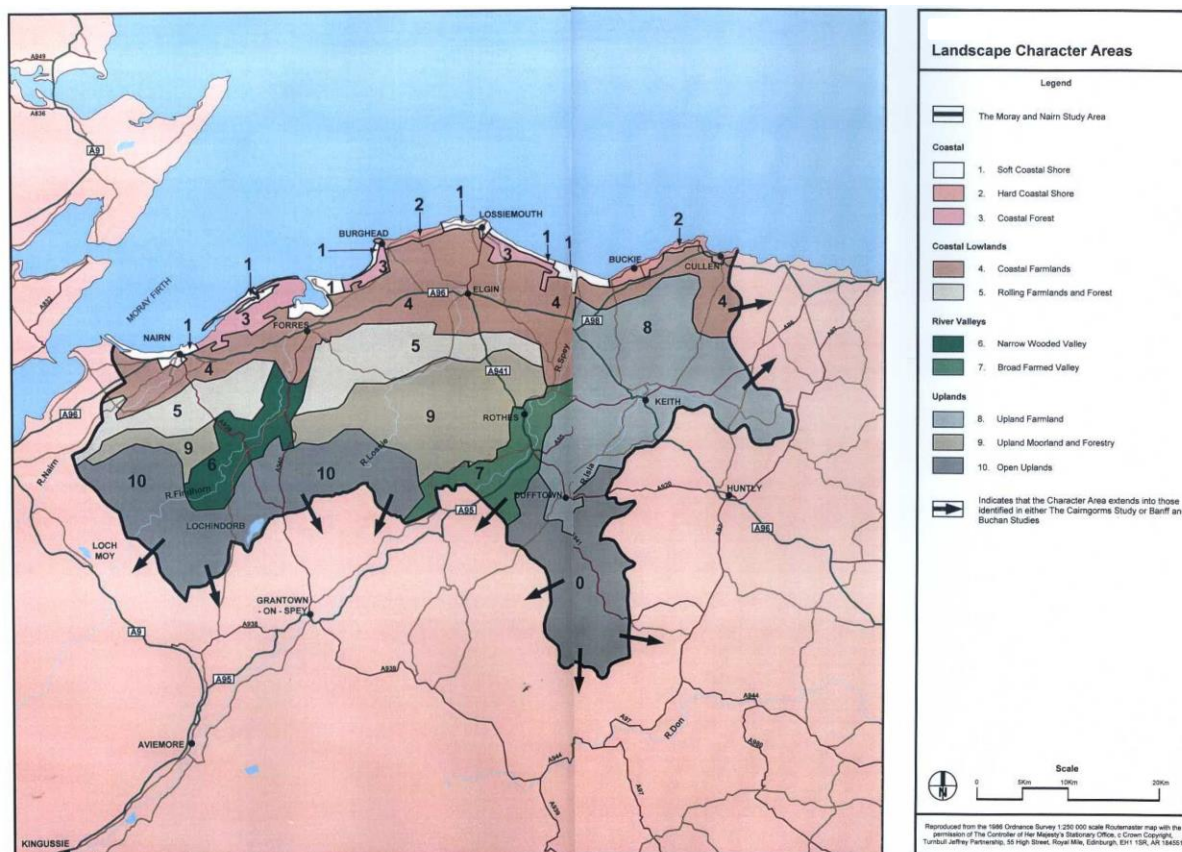
- Protect and enhance biodiversity and support healthier ecosystems;
- Connect people with the nature to improve health and wellbeing;
- Maximise the benefits of a diverse natural environment and the services it provides, contributing to sustainable economic growth; and
- Promote green corridors and planting for biodiversity in new developments.

Landscape

In 1998, Scottish Natural Heritage (SNH) produced a report providing a detailed assessment of the landscape of Moray and Nairn. The report considered likely pressures and opportunities for change in the landscape, assessed the sensitivity of the landscape to change and provided guidelines on how the landscape character may be conserved, enhanced or restructured.

Identifying 10 character areas, the report noted that Moray has a varied landscape character with distinctive landscape features including open heather moorlands, forests and woodlands. The 10 Landscape Character Areas are:-

- Soft Coastal Shore – a coastal margin of broad intertidal flats, dunes, curving sand and shingle beaches and salt marsh, forming the transition zone between land and sea;
- Hard Coastal Shore – an irregular coastal edge of relatively remote, small coves and pebble strewn raised beaches backed by Old Red Sandstone cliffs;
- Coastal Forests – dense stands of mature commercial conifers of single species and age planted on gently undulating coastal sand dunes and poorer gravels of the coastal margins;
- Coastal Farmland – flat to gently undulating coastal plain at the foot of hills to the south with extensive long bands of coniferous plantation and shelterbelts creating a backdrop to large, smooth and arable fields;
- Rolling Farmland and Forests – complex landform of gently rounded hills and broad and narrow incised valleys which are often contained and divided by smooth stepped ridges;
- Narrow Wooded Valley – deeply incised landform of rocky gorges, a variety of falls, pools and the gushing channels of the River Findhorn within a narrow enclosed and densely wooded valley;
- Broad Farmed Valley – dominated by the broad, sinuous River Spey, and its distinctive flat floodplain and valley bottom and contained by a series of convex hills and long spurs;
- Upland Farmland – broad, gently undulating slopes rising in close proximity to the coast, cut by gently graded valleys to the higher lands and punctuated by distinctive conical hills;
- Upland Moorland and Forestry – largely inaccessible areas of broad, rounded hills and upland plateaux covered in an almost equal balance of heather and grass moorland and large-scale coniferous plantations; and
- Open Uplands – series of rounded hills with summits of a generally similar height, broad smooth ridges and expansive gently undulating plateaux.



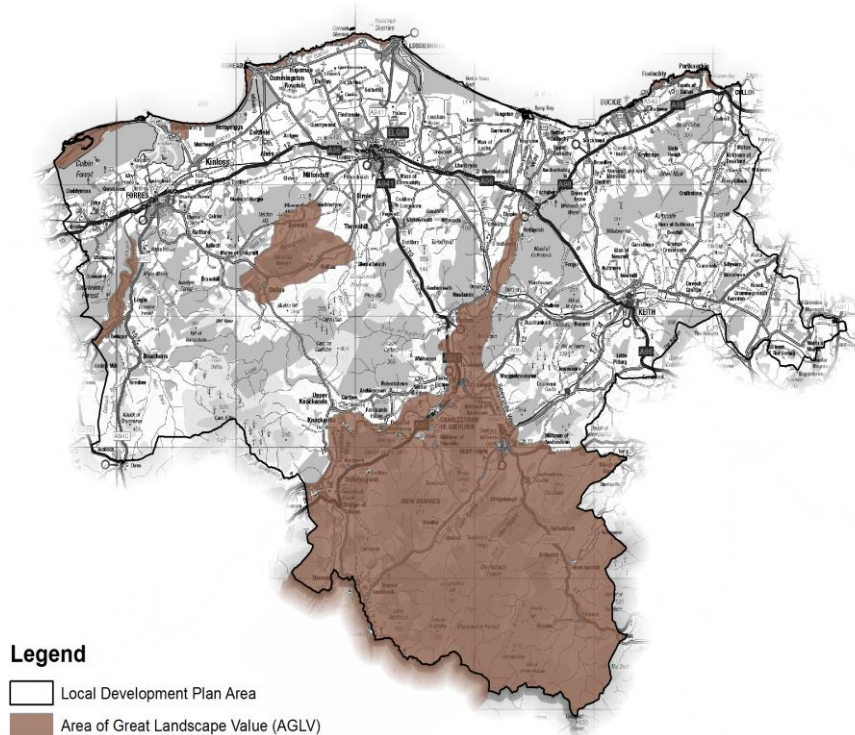
Map 3 – Landscape Character Areas in Moray and Nairn (SNH 1998)

In order to protect areas of strategically important landscapes from inappropriate development, Moray has 8 Areas of Great Landscape Value (AGLV) which are broad-brush designations with no formal record of their special qualities. Policy E7 of the MLDP2015 *Areas of Great Landscape Value (AGLV) and Impacts Upon the Wider Landscape* aims to protect these areas in addition to retaining their traditional character. In line with national guidance, AGLVs will be renamed as Special Landscape Areas in the Moray LDP 2020.

The main pressures on Moray's Special Landscape Areas are from:-

- The cumulative build-up of housing in the countryside which is gradually eroding the quality of some rural parts of Moray;
- Major infrastructure projects such as the dualling of the A96 and new power/transmission lines; and
- Large scale wind turbine proposals, with recent scoping opinions lodged for proposals with turbines up to 225 metres to tip.

However, it is recognised that a review of the Special Landscape Areas boundaries is required and the Council will use the forthcoming new Landscape Character Assessment being finalised by Scottish Natural Heritage to inform the review.



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Map 4 – Areas of Great Landscape Value in Moray

Cumulative build-up of housing in the countryside is resulting from a generally permissive policy approach, which has undermined the settlement strategy and the policy is currently being reviewed.

In terms of major infrastructure proposals, these require their own Environmental Assessment and the Council will continue to work with infrastructure providers to minimise and mitigate impacts upon Moray's landscape.

In addition to housing development, Moray has a number of wind farms and turbines across the region. Consent has been granted for large scale wind farms at Berry Burn, Dorenell, Edintore, Hill of Glaschyle, Hill of Towie, Kellas, Meikle Hill, Rothes and Paul's Hill. Dorenell and Hill of Towie (Drummuir) were approved on appeal, following Public Local Inquiries, by the Scottish Government. Other wind farm proposals are at various stages in the planning process.

As part of the review of the Onshore Wind Energy Policy Guidance, the Council commissioned an update of the 2012 Moray Wind Energy Landscape Capacity Study with the aim of providing supporting information to the Spatial Framework set out in the LDP. The study divides Moray into a number of landscape character types and considers the capacity of each for the four typologies (scales) of turbine. These landscape character types apply to wind energy proposals only. More information on the Wind Energy Policy Guidance can be found at http://www.moray.gov.uk/moray_standard/page_80938.html

Although the Cairngorm National Park and Cairngorm Mountain National Scenic Area lay out with the scope of the Moray LDP, Policy E6 *National Parks and National Scenic Areas (NSA)* of the Moray LDP aims to safeguard areas of nationally

important landscapes from inappropriate development which may have an impact upon these designations.

A Coastal Protection Zone (CPZ) is identified along the Moray coast to protect and enhance its landscape, nature conservation, recreation and tourism benefits. Within this undeveloped coastline, only certain types of development - set out in Policy E8 *Coastal Protection Zone* - will be acceptable. This policy has generally worked very well, however some encroachments for tourism developments have occurred and must be carefully monitored.

There are also 5 Countryside Around Town areas identified around the main towns and these are intended to safeguard the transition area between town and country, with only certain limited types of development supported by policy.

The special qualities of Pluscarden are recognised in the special area of protection, which again limits the type of development acceptable. It is proposed to integrate this designation into the review of the Special Landscape Areas.

Implications for LDP:-

- Commission updated landscape study to consider “new” sites, if required;
- Ensure findings from previous studies are reflected in site designations;
- Need to review effectiveness of housing in the countryside policies;
- Rename AGLV’s as Special Landscape Areas;
- Review AGLV designation; and
- Embed the new Landscape Character Assessment into policy.

Cultural Heritage

Moray has a rich and diverse historical and cultural heritage, embracing Neolithic, Pictish, Celtic, Viking, Medieval and Jacobite associations. Collectively, this heritage contributes greatly to the character of Moray and provides a sense of place and identity. Moray's archaeological heritage contributes greatly to the area's tourism, leisure and educational value.

Listed Buildings

Buildings with special architectural and historic interest are protected for future generations under the Planning (Listed Buildings and Conservation Areas) (Scotland) Act 1997. A building which is listed is managed carefully through the planning system so that proposed changes can be considered carefully.

Under legislation, the term 'building' is defined broadly and can include, for example, buildings, walls, fountains, statues, sundials, bridges, bandstands and telephone boxes. In Moray, there are 1,663 Listed Buildings in Moray, split across 3 categories:-

- Category A: Buildings of international, national or architectural importance or little-altered examples of styles or periods.
- Category B: Buildings of regional importance or important historic buildings that have been altered.
- Category C: Buildings of local importance and lesser examples of a particular era which may have been altered.

A breakdown of categories can be found in the table below and full list of listed buildings in Moray can be found at <http://portal.historicenvironment.scot/designations>.

Category	No. of Listed Buildings
A	113
B	764
C	786

Figure 4 – Categories of Listed Buildings in Moray

Conservation Areas

Designated and afforded statutory protection under the Planning (Listed Buildings and Conservation Areas) (Scotland) Act 1997, there are 18 Conservation Areas within the Moray LDP area. A Conservation Area is defined as “an area of special architectural or historic interest, the character or appearance of which it is desirable to preserve or enhance.”

Policy BE3 *Conservation Areas* of the Moray LDP 2015 aims to preserve or enhance the established traditional character or appearance of the area. Further information on Moray's Conservation Areas can be found at http://www.moray.gov.uk/moray_standard/page_86282.html

In response to pressure on UPVC replacement windows on listed buildings and Conservation Areas, the Council approved design guidance for Conservation Areas

and Listed Buildings for the replacement of windows and doors. The guidance seeks to protect and preserve original windows and doors, where possible. More information can be found at

http://www.moray.gov.uk/moray_standard/page_82231.html

During a review of Conservation Areas in 2015, Character Appraisals of the Cullen, Findhorn and Keith (Mid Street) were developed by the Council's Planning & Development team. Current appraisals can be found at

http://www.moray.gov.uk/moray_standard/page_1861.html

Administered by Historic Environment Scotland on behalf of the Scottish Government, Conservation Area Regeneration Schemes (CARS) provide financial help for conservation area based regeneration and conservation initiatives. A successful CARS project in Keith concluded in March 2016. In 2013, Elgin CARS was launched and, over a five year period, the scheme aims to attract more visitors, businesses and residents using the town centre's distinctive, traditional character of the buildings and streetscape. More information on Elgin CARS can be found at

<http://elgincars.org.uk/>

Scheduled Monuments

Under the Ancient Monuments and Archaeological Areas Act 1979, Historic Environment Scotland (HES) maintains a list of monuments of national importance. Scheduling helps preserve Moray's most significant sites and monuments, by law, as far as possible in its current form.

There are a number of different archaeological periods, themes or monument types that a site or monument can be scheduled against and more information on classifications can be found at <https://www.historicenvironment.scot/advice-and-support/listing-scheduling-and-designations/scheduled-monuments/types-of-scheduled-monument/>

In Moray, there are 74 Scheduled Monuments of which 51.3% are within Settlements defined in the Moray LDP 2015. Monuments include Kinloss Abbey, Spynie Palace, Burghead Well and Dallas Dhu Distillery.

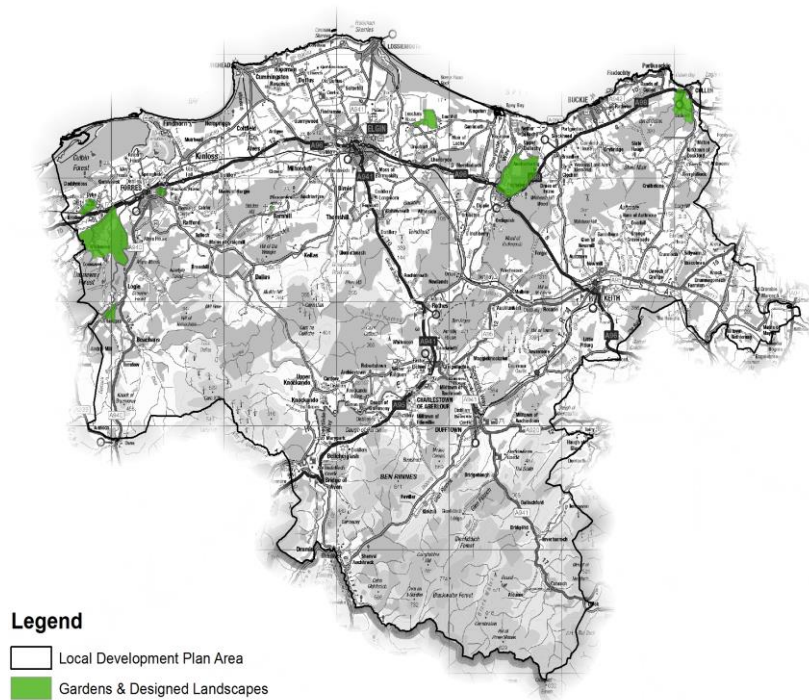
Gardens & Designed Landscapes

Gardens and designed landscapes of national artistic and/or historical significance are designated in order to safeguard their future from harmful development. Whilst sites on the Inventory of Gardens and Designed Landscape, maintained by HES, are not protected by primary legislation, Inventory status is a material consideration in the planning system.

There are 8 designated Gardens & Designed Landscapes in Moray. The most famous of these is Pluscarden Abbey.

Thought to be the oldest gardens in Scotland, dating from 1230, the designed landscape of Pluscarden Abbey makes a significant contribution to the surrounding scenery and has an outstanding historical and architectural value. Pluscarden is designated as an Area of Special Control and protected by Policy BE6 *Pluscarden Area of Special Control* which prevents the development of new additional housing

(including replacement) in order to safeguard the visual setting of the Abbey and to retain the character and environment of the surrounding area.



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Map 5 – Designated Gardens & Designed Landscapes

Battlefield

The Battle of Glenlivet is the only battlefield designation in Moray. Taking place on 3 October 1595, the Battle of Glenlivet was considered, at the time, to be a religious battle between the Catholic forces of George Gordon, 1st Marquess of Huntly, and Frances Hay, 9th Earl of Erroll, and the Protestant army of Archibald Campbell, 7th Earl of Argyll. After two phases of battle, the Earl of Argyll's army was defeated.

Implications for the LDP:-

- Preserve and promote Moray's cultural heritage;
- Plan will include policies to protect and enhance cultural heritage including listed buildings, conservation areas, archaeological sites and scheduled ancient monuments; and
- Design policies and guidance required for listed buildings and Conservation Areas to retain the distinctive characters.

Communities and Infrastructure

Communities

There are approximately 96,070 people living within Moray, an increase of 0.6% from 2015, accounting for 1.8% of the total population of Scotland. Moray has an ageing population with 26.9% of the population being aged 60 years and over, with only 16.1% aged between 16 and 29 years. In addition to an ageing population, life expectancy for both males and females in Moray is greater than the Scottish average.

	Base Year	Projected Year				
Age Group	2014	2019	2024	2029	2034	2039
0-15	16,591	16,141	15,786	15,471	15,442	15,246
16-29	15,472	14,987	14,549	14,100	13,919	13,655
30-49	24,245	22,796	22,325	23,020	22,805	22,528
50-64	19,454	20,705	20,836	19,210	17,622	17,123
65-74	10,563	11,385	11,766	12,908	13,890	13,479
75+	6,566	7,459	9,262	10,645	12,007	13,542
Total	92,891	93,473	94,524	95,354	95,685	95,583

Figure 5 – Population Projection Rates by Age Groups

Migration is still a contributing factor to population growth in Moray. Between 2013–2015, there was a net inflow of 494 people into Moray per year. The table below shows a breakdown of net migration into different age groups:

Age Group	In	Out	Net Migration
0-15	766	616	150
16-29	953	1,094	-141
30-49	849	630	219
50-64	692	486	206
65-74	306	246	60
Total	3,566	3,072	494

Figure 6 – Net Migration by Age Groups

The 16-29 age category accounts for both the highest number of in and out migrants and is the only category with a net deficit. This trend has not changed significantly from 2016 and suggests that Moray is struggling to retain school leavers and graduates who are essential to the long term sustainability of Moray's economy and supporting the projected ageing demographics of the area.

The most densely populated part of the region is Elgin which has approximately 23,128 residents, roughly 24.1% of the overall population of Moray. Elgin is the primary centre within the Settlement Hierarchy of the Moray LDP 2015 and is the administrative headquarters of Moray Council.

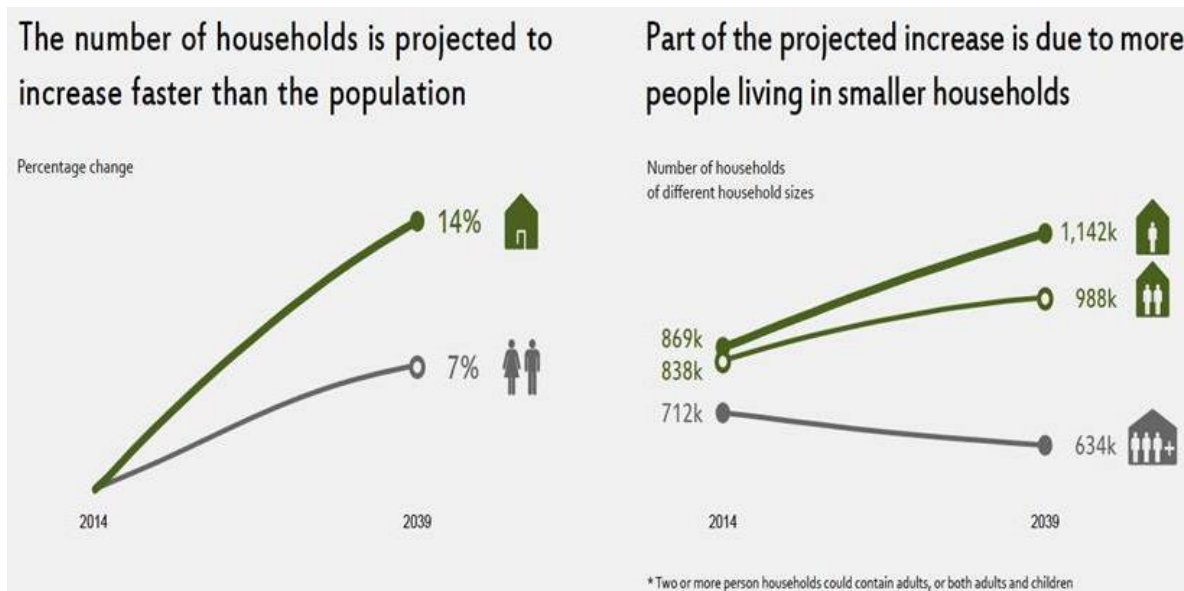


Figure 7 – Household Projections in Scotland

In Moray, the number of households is projected to be 46,832 in 2039, an increase of 13% from 2014. Overall, the population of Scotland is projected to be 6.62% higher in 2039 than in 2014. One of the reasons for the projected increase in households is due to more people living in smaller households. The changing demographics highlight that there will be a significant change in household type which has been taken account of in the Council's Housing Needs and Demand Assessment and will need to continue to be taken into account for the provision of housing for the next 25 years. This creates demand for smaller houses, flats, terraced properties, and houses for the elderly including accessible housing:-

Household Type	2014	2039	% change in Moray 2014-2039
1 adult	12,894	16,832	31%
1 adult with 1 or more children	2,017	3,413	69%
3 or more adults	3,251	2,507	-23%
2 or more adults with 1 or more children	8,495	7,157	-16%
Total	41,288	46,832	13%

Figure 8 – Household Type Projection Rates

The Moray Housing Land Audit 2017 identifies a 24.4 year established housing land supply, consisting of 7.6 years effective housing land (4094 units) and 16.8 years constrained housing land (9047 units). The constrained housing land supply includes 945 units identified as LONG term sites.

Completion rates have continually fallen significantly below the 2011 Housing Need and Demand Assessment (HNDA)'s annual requirement of 538 units.

Year	Completions
2012	341
2013	295
2014	309
2015	337
2016	334

Figure 9 – Completion Rates in Moray

Largely based upon returns from housebuilders and landowners, projected completion rates are expected to increase, but continue to fall below the HNAD annual requirement.

Year	Completions
2017	422
2018	390
2019	496
2020	509
2021	479

Figure 10 – Projected Completion Rates in Moray

Infrastructure

Moray has some of the biggest export businesses in Scotland, in particular the whisky industry. Due to Moray's location, infrastructure plays a major role in connecting the region to the rest of Scotland and beyond. Home to some of the biggest export businesses in Scotland, particularly the whisky industry, there is a need to improve and develop infrastructure in order to accommodate growth and inward investment.

The A96 is the trunk road linking Inverness and Aberdeen and runs through Moray. In December 2011, the Scottish Government announced its commitment to fully dual the A96 by 2030. The programme aims to deliver a number of benefits including improved journey time and reliability, delivering economic growth, improved connectivity and reduce the rate and severity of accidents.

Within the same timescales, Transport Scotland has announced a rail improvements project for the Aberdeen to Inverness line. The project aims to deliver a 2 hour journey time (end to end), an hourly service, enhanced commuter services into each city, infrastructure to support new stations at Kintore (Aberdeenshire) and Dalcross (by Inverness Airport) and increased opportunities for freight.

In 2017, the Council approved an Active Travel Strategy which sets out how Moray Council will encourage more non-motorised travel within Moray through a series of programmes of direct measures and behaviour change programmes. According to the Scottish Household Strategy 2016, 19% of households in Moray do not have access to a private car, compared to 29% in Scotland. Many journeys within the urban areas of Moray are less than 5km in length and therefore ideal journeys for walking or cycling. Whilst a total of 12% of adults in Moray usually or regularly cycle to work, the Scottish Government have set an aspirational figure of 10% of all journeys to be made by bicycle by 2020 and significant work is required to meet the

target. The Active Travel Strategy proposes a number of actions in order to help achieve this by supporting behaviour change.

The existing infrastructure for cyclists and pedestrians provides a reasonable network of active travel routes. In Moray, there are 3 long distance routes (The Speyside Way, the Dava Way and a section of National Cycle Network Route 1 'The North Sea Cycle Route') which provides opportunities for people to travel through Speyside and the Dava. In urban areas, the network of local routes has several gaps resulting in a lack of continuous high quality routes which would encourage users.

Similarly, the extensive network of core paths provides a source of routes for active travel. However, there is a lack of information telling people that there are core paths available for all to use and further work is needed to promote the increased usage of the core path network.

To access faster, reliable and better broadband, Highlands and Islands Enterprise (HIE) and Digital Scotland are investing £146m to roll out a fibre network across the Highlands and Islands region. In April 2017, 91% more premises had access to fibre broadband compared to 2013. By allowing organisations to work flexibly, maximise efficiencies and compete globally, improved broadband will open up opportunities for existing businesses and attract new companies to the area.

Prime Agricultural Land

Moray has extensive areas of prime agricultural land along the coastal plains and extending up the River Spey corridor. This agricultural land is very productive in terms of producing grain, vegetables and supporting livestock. Prime agricultural land is threatened and eroded by settlement expansion and through cumulative impacts of development. While the MLDP2015 contains a policy to safeguard prime agricultural land, this will be further supported through the review of the housing in the countryside policy.

However, no statistics are available to substantiate the area of land transitioning from prime agriculture to built development and this should be monitored in future. The greatest losses occur from settlement expansion, which impact upon greenfield sites due to the limited brownfield site options available.

Employment Land

Demand for employment land comes from a mix of existing businesses as well as new start-ups and inward investors from outwith Moray. Approximately 10-12 acres of land is built out each year in Moray, and this figure is used as a basis to identify how much land is required to support economic growth.

Housing Market Area	Area Required
Elgin	23 hectares
Forres	12 hectares
Buckie	A strategic reserve of land
Keith	3.5 hectares
Speyside	4.8 hectares

Figure 11 – Minimum Employment Land Requirements

With projected growth and limited brownfield opportunities, the shortage of employment land will put an increased pressure on the release of greenfield sites. This in turn would result in further loss of prime agricultural land.

Vacant and Derelict Land

As part of the Scottish Vacant and Derelict Land Survey, data is provided to the Scottish Government on the extent and state of vacant and derelict land in Moray. Twenty-one sites covering a total of 16.55ha of land were identified as vacant or derelict in Moray settlements for the 2017 data return.

13 of the surveyed sites are classed as vacant land. Vacant land is previously developed land, without physical constraint, which the Planning Authority has indicated is currently available for redevelopment.

8 of the surveyed sites are classed as derelict land. Derelict land is previously developed land, which has a physical constraint caused by its previous use, which hampers its redevelopment or naturalisation. The survey does not include vacant buildings.

Implications for LDP:-

- Housing Land Requirements to be informed by Housing Need and Demand Assessment;
- Site designations may specify detailed affordable housing requirements;
- Density levels may have to increase;
- Ensure a mix of housing is provided to meet the changing demographics of an ageing population and smaller household size;
- Plan to reflect the Elgin Transport Strategy and Second Local Transport Strategy and promote sustainable transport;
- Future monitoring of the impact of development on environmental resources; and
- Promote and develop the network of cycle and core paths to encourage active travel.

Appendix 1

Protected Sites in Moray

Site Code	Site Name	Designation
8151	Findhorn Bay	Local Nature Reserve
8445	Loch Spynie	Ramsar Site
8447	Moray and Nairn Coast	Ramsar Site
8238	Culbin Bar	Special Area of Conservation
8271	Hill of Towanreef	Special Area of Conservation
8310	Lower Findhorn Woods	Special Area of Conservation
8311	Lower River Spey - Spey Bay	Special Area of Conservation
8318	Moidach More	Special Area of Conservation
8327	Moray Firth	Special Area of Conservation
8365	River Spey	Special Area of Conservation
8672	Darnaway and Lethen Forest	Special Protection Area
8540	Loch Spynie	Special Protection Area
10490	Moray Firth (Proposed)	Special Protection Area
8550	Moray and Nairn Coast	Special Protection Area
8584	Tips of Corsemaul and Tom Mor	Special Protection Area
237	Boghole, Muckle Burn	Site of Special Scientific Interest
270	Buinach and Glenlatterach	Site of Special Scientific Interest
273	Burn of Ballintomb	Site of Special Scientific Interest
361	Clashach - Covesea	Site of Special Scientific Interest
391	Coleburn Pasture	Site of Special Scientific Interest
478	Culbin Sands, Culbin Forest and Findhorn Bay	Site of Special Scientific Interest
480	Cullen to Stake Ness Coast	Site of Special Scientific Interest
482	Cutties Hillock	Site of Special Scientific Interest
505	Den of Pitlurg	Site of Special Scientific Interest
516	Dipple Brae	Site of Special Scientific Interest
637	Findrassie	Site of Special Scientific Interest
752	Gull Nest	Site of Special Scientific Interest
786	Hill of Towanreef	Site of Special Scientific Interest
829	Kellas Oakwood	Site of Special Scientific Interest
924	Lethenhill	Site of Special Scientific Interest
1043	Loch Oire	Site of Special Scientific Interest
1054	Loch Spynie	Site of Special Scientific Interest
1100	Lossiemouth East Quarry	Site of Special Scientific Interest
1101	Lossiemouth Shore	Site of Special Scientific Interest
1104	Lower Findhorn Woods	Site of Special Scientific Interest
1107	Lower River Spey	Site of Special Scientific Interest
1108	Lower Strathavon Woodlands	Site of Special Scientific Interest
1132	Masonshaugh	Site of Special Scientific Interest
1156	Mill Wood	Site of Special Scientific Interest
1173	Moidach More	Site of Special Scientific Interest
1196	Moss of Crombie	Site of Special Scientific Interest
1317	Quarry Wood	Site of Special Scientific Interest
1330	Randolph's Leap	Site of Special Scientific Interest
1699	River Spey	Site of Special Scientific Interest
1409	Scaat Craig	Site of Special Scientific Interest
1423	Shiel Wood Pastures	Site of Special Scientific Interest

1461	Spey Bay	Site of Special Scientific Interest
1464	Spynie Quarry	Site of Special Scientific Interest
1526	Teindland Quarry	Site of Special Scientific Interest
1706	Tips of Corsemaul and Tom Mor	Site of Special Scientific Interest
1577	Tynet Burn	Site of Special Scientific Interest

Appendix 2

Pressures from Development on Special Areas of Conservation (SAC) and Special Protection Areas (SPA)

Site Name	Designation	Qualifying Interests	Pressures from Development
Culbin Bar	SAC	Atlantic salt meadows, shifting dunes and coastal shingle vegetation outside the reach of waves.	Direct loss of, or disturbance to, habitat.
Hill of Towanreef	SAC	Blanket bog; dry, alpine and subalpine heaths; marsh saxifrage and juniper on heaths or calcareous grasslands and grasslands found on soils rich in heavy metals	Direct loss of, or disturbance to, habitat. Change in hydrology and air quality.
Lower Findhorn Woods	SAC	Mixed woodland on base rich soils associated with rocky slopes	Direct loss of, or disturbance to, habitat. Change in hydrology (particularly hydrological processes and functions supporting the qualifying interest) and air quality.
Lower River Spey - Spey Bay	SAC	Alder woodland on floodplains and coastal shingle vegetation outside the reach of waves	Direct loss of, or disturbance to, habitat. Change in hydrology (particularly hydrological processes and functions supporting the qualifying interests) and air quality.
Moidach More	SAC	Blanket bog	Direct loss of, or disturbance to, habitat. Change in hydrology (particularly hydrological processes and functions supporting the qualifying interest) and air quality.
Moray Firth	SAC	Subtidal sandbanks and bottlenose dolphin	Direct loss of, or disturbance to, habitat. Pollution and sedimentation affecting the qualifying habitat, structure and supporting

River Spey	SAC	Atlantic salmon, freshwater pearl mussel, otter and sea lamprey	processes of the habitats used by dolphin and their prey. Direct loss of, or disturbance to, habitat. Change in hydrology (particularly hydrological processes and functions supporting the qualifying interest) and water quality (e.g. pollution and sedimentation, as well as oxygen levels) and quantity (e.g. flow levels).
Darnaway and Lethen Forest	SPA	Breeding Capercaillie	Direct loss of or damage to habitat (either directly or through hydrological changes), collision risk and disturbance.
Loch Spynie	SPA	Greylag goose	Direct loss of or damage to habitat (either directly or through hydrological changes or pollution), collision risk and disturbance.
Moray Firth (Proposed)	SPA	Non-breeding common scoter, eider, goldeneye, great northern diver, long-tailed duck, red-breasted merganser, red-throated diver, scaup, Slavonian grebe and velvet scoter and breeding and non-breeding shag	Direct loss of or damage to habitat, (either directly or through hydrological changes or pollution/sedimentation), collision risk and disturbance.
Moray and Nairn Coast	SPA	Non-breeding bar-tailed godwit, common scoter, dunlin, greylag goose, long-tailed duck, oystercatcher, pink-footed goose, red-breasted merganser, redshank, velvet scoter, waterfowl assemblage, wigeon and breeding osprey	Direct loss of or damage to, habitat (either directly or through hydrological changes or pollution/sedimentation), collision risk and disturbance.
Tops of Corsemaul and Tom Mor	SPA	Breeding common gull (Larus canus)	Direct loss of or damage to habitat (either directly or through hydrological changes or pollution/sedimentation), collision risk and disturbance.

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