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# Moray Housing Land Audit



**moray**  
council



## Moray towns and Local Housing Market Areas (LHMA)



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## Preface

This schedule of housing land is produced by Moray Council in consultation with local housebuilders and landowners. While every effort has been made to ensure that the information in the audit is accurate and complete, the attention of the user is drawn to the following points:

- The introduction contains advice on the interpretation and analysis of the statistics and this should be carefully studied, to avoid possible misrepresentation.
- The information on housing is presented comprehensively for sites of 4 or more houses, only aggregated annual totals of past completions are given for smaller sites and individual houses.
- Development Plans, Capital Programmes and commitment levels are continually being updated and should be checked with the appropriate source to obtain the current position.

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## Contents

1	Purpose of Audit	1
2	Preparation of Audit	1
3	Land Supply Definitions	2
4	Established Land Supply	3
5	Constrained Land Supply	4
6	Effective Land Supply	5
7	Rest of Moray	5
8	Windfall sites	6
9	Completions	6
10	Housing Requirement and Effective Housing Land Supply	7
11	Long term housing designations	9
	<b>Glossary</b>	<b>10</b>
	<b>Development Schedules</b>	<b>12</b>

# 1 Purpose of Audit

- 1.1 This audit provides details of Moray's housing land supply as at January 2020. The audit explains the different classifications of land within the overall supply and compares supply with the housing land requirement identified through the Housing Need and Demand Assessment.
- 1.2 The audit also examines past and future predicted trends in housing land supply and identifies any action required to address issues arising.
- 1.3 The audit has been produced using the guidance set out in Scottish Planning Policy, Planning Advice Note 2/2010 and Homes for Scotland Advice Note on Housing Land Audits.
- 1.4 Scottish Planning Policy 2014 requires planning authorities to ensure;
  - Local development plans set out the housing supply target (separated into affordable and market sectors) and the housing land requirement for each housing market area up to year 10 from the expected year of adoption.
  - Allocate a range of sites which are effective or expected to become effective in the plan period to meet the housing land requirement in full.
  - Provide a minimum of 5 years effective land supply at all times.
  - Indicate the possible scale and location of the housing land requirement beyond year 10 and up to year 20.

# 2 Preparation of Audit

- 2.1 The draft audit has been prepared by Moray Council using details of all relevant development sites within the Moray Local Development Plan 2015, sites identified in the emerging Moray Local Development Plan 2020 and other (windfall) sites with planning consent for residential use.
- 2.2 Completions have been recorded through contact with housebuilders and analysis of building warrant completion certificates. Constraints have been identified through the local development plan process and through discussion with statutory consultees.
- 2.3 Details of sites with a capacity of 4 or more houses are recorded and an assessment made of potential future development rates, informed by landowners and developers. This takes account of planning status, infrastructure constraints, building capacity, market demand and financial plans.

## 3 Land Supply Definitions

3.1 There are three categories of land identified within the audit.

### 3.2 **Established Housing Land Supply**

3.2.1 This is the total housing land supply, calculated by adding the effective and constrained land together. This includes sites under construction, sites with planning consent and other sites agreed as having potential for development.

### 3.3 **Effective Housing Land Supply**

3.3.1 This is the housing land supply that is expected to be free from development constraints and available for construction of housing. Most sites with planning consent for residential development and/or identified within the Moray Local Development Plan 2015 and in the emerging Moray Local Development Plan 2020 fall into this category where the site is free of the following constraint:-

- Ownership
- Physical
- Contamination
- Deficit funding
- Marketability
- Infrastructure
- Land

### 3.4 **Constrained Housing Land Supply**

3.4.1 This consists of sites which at the time of the audit were not assessed as being effective. The principal reason for the site being constrained is identified in the schedules. The identified constraint is considered to be significant and may not be resolved within the “effective” land supply period. This also includes “LONG” designations, which are constrained under the terms of the Local Development Plan.



## 4 Established Land Supply

4.1 The established land supply for the Moray Local Development Plan is shown in Table 1 below.

	2016	2017	2018	2019	2020
Moray	13,090	13,112	12,848	12,387	12,528

*Table 1: Established Land Supply*

4.2 The established land supply in 2020 has a capacity of 12,528 units. This includes extensive areas of LONG term land, which act as a reserve and can be released should a shortfall be projected.



## 5 Constrained Land Supply

5.1 The constrained land supply is shown in Table 2.

	2016	2017	2018	2019	2020
<b>Moray</b>	<b>10,384</b>	<b>8,318</b>	<b>9,210</b>	<b>8,198</b>	<b>6,890</b>

Table 2: Constrained Land Supply

5.2 A total of 6890 units are constrained in 2020, reflecting the more proactive approach being taken to overcome constraints and explore ways of unlocking sites. Table 3 below summarises the constrained sites and the nature of the constraint. The table shows that the majority of these sites are constrained through programming either as "LONG" designations or programmed as unlikely to be built within the 5 year effective period. LONG sites can only be considered effective when the required triggers for release of LONG sites have been met and the site is free of the constraints listed in paragraph 3.3.1.

<b>Constraint</b>	<b>No. of units</b>	<b>No. of sites</b>
Contamination	60	1
Marketability	544	23
Ownership	243	4
Physical	158	8
Programming	1,380	4
LONG	4,505	9
<b>Total</b>	<b>6,890</b>	<b>49</b>

Table 3: Analysis of Constraints



## 6 Effective Land Supply

6.1 The five year effective land supply for the Moray Local Development Plan area is shown in Table 4.

	2016	2017	2018	2019	2020
<b>Moray</b>	<b>2,706</b>	<b>4,794</b>	<b>3,638</b>	<b>4,189</b>	<b>5,638</b>

Table 4: Effective Housing Land Supply

6.2 The effective housing land supply has a capacity of 5638 units in 2020, significantly higher as the new sites identified in the emerging Moray Local Development Plan 2020 are included in the audit. A site at Elgin South for the proposed Moray Sports Centre, Linkwood Primary School and approximately 150 units was released through the 2016 audit and sites at Bilbohall have also come forward from the constrained supply to the effective supply.

The significant impact of the Covid-19 pandemic on the construction industry has been reflected in the projected completion rates for 2020 and 2021 and as the economic recovery process becomes clearer it may be that further adjustments are required to projected completion rates.

## 7 Rest of Moray

7.1 In the Rest of Moray there are a number of consents granted for sites with a capacity of 4 units and over, which cumulatively make a significant contribution to the housing land supply. New consents and completions are monitored and added to the schedules as part of the audit. The contribution from small sites and the role of sites in rural communities was discussed and agreed as 50 units with Homes for Scotland as part of the 2009 audit. A figure of 65 units was included in the 2019 unit. However, to reflect the new Rural Housing policy this has been lowered to 40 and will continue to be monitored and reviewed again if necessary.



## 8 Windfall sites

- 8.1 A windfall site is a site not specifically allocated for development in the Local Development Plan but which becomes available for development or is granted planning permission during the lifetime of the Plan.
- 8.2 The contribution of windfall sites to the number of units completed and projected to be complete will be monitored. Windfall completions can make a significant contribution to the land supply.

	2014	2015	2016	2017	2018	2019
Windfall completions	13	63	42	56	38	16

Table 5a: Windfall sites

	2020	2021	2022	2023	
Projected windfalls	53	43	45	54	

Table 5b: Projected windfall

## 9 Completions

- 9.1 Table 6 identifies previous completion rates.

	2015	2016	2017	2018	2019
Moray	336	335	350*	358	414

**2017\* note revised completion figure from figure published in 2018 Audit.**

Table 6: Completions



- 9.2 Table 7 identifies projected completion rates for the five year effective housing land period. These are largely based upon returns from housebuilders and landowners and will be subject to further refinement during the consultation period on the draft housing land audit.

	2020	2021	2022	2023	2024
<b>Moray</b>	<b>186</b>	<b>411</b>	<b>478</b>	<b>501</b>	<b>584</b>

*\*The figures beyond years 1-3 are recognised nationally to be higher than likely completions. For the purposes of other projections such as transport and school roll modelling, completions in years 4 and-5 will be adjusted by a factor of 0.75.*

Table 7: Projected Completion Rates

## 10 Housing Land Requirement & Effective Housing Land Supply

- 10.1 The Council's Housing Need and Demand Assessment 2017 has informed the housing land supply and housing completions targets set out in the emerging Moray Local Development Plan 2020. These figures have included a 30% generosity figure on top of the baseline figures from the Housing Need and Demand Assessment 2017. The key targets are;

- Annual housing completion target 2018-2035-304 units
- Annual average housing land supply target 2018-2035-395 units

- 10.2 Using these figures gives a 5 year completion target of 1520 units and a 5 year land supply target of 1975 units. An additional table will be included in the final version of this audit to reflect the outcomes of the Examination into the Moray Local Development Plan 2020, including a breakdown by LHMA to assist future monitoring.

	Housing Land Supply	No. of years supply
<b>Established</b>	<b>12,528</b>	<b>30.2</b>
<b>Effective</b>	<b>5,638</b>	<b>13.6</b>
<b>Constrained</b>	<b>6,890</b>	<b>16.6</b>

Table 8: Land supply/ No. of years supply

LHMA	5 year supply target (5x 414)	5 year land supply 2020-2024	5 year completion target (5x318)	5 year projected completions	Comments
<b>Buckie</b>	342	817	1590	269	Surplus effective housing land.
<b>Elgin</b>	1037	2861		1220	Surplus effective housing land.
<b>Forres</b>	362	1471		373	Surplus effective housing land.
<b>Keith</b>	170	173		131	Surplus effective housing land.
<b>Speyside</b>	159	316		167	Surplus effective housing land.
<b>Total</b>	2070	5638		2160	Surplus effective housing land.

Table 9: 5 year housing land/ completion targets by LHMA

10.3 The audit totals of effective, constrained and established housing land supply are set out in Table 10 below.

	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Effective</b>	2,142	2,129	2,630	2,474	2,706	4,794	3,638	4,189	5,638
<b>Constrained</b>	4,874	4,885	4,152	3,947	10,384	8,318	9,210	8,198	6,890
<b>Established</b>	7,016	7,014	6,782	6,421	3,090	13,112	12,848	12,387	12,528

Table 10: Moray Housing Land Supply 2017

10.4 Long term designations have been identified to set out the direction of growth and to assist in the forward planning of infrastructure and landscape enhancement/ mitigation. The Council will evaluate the need for early release of long term housing land through the annual housing land audit process and monitoring report. The release of LONG term designations is controlled through the policies of the Local Development Plan.

Additional text will be added to the final version of this audit upon completion of the Examination of the Moray Local Development Plan 2020.



A summary assessment of the triggers against each LONG term site will be included within the 2021 audit, it is not included this year as the effective land supply is significant, having been increased through new designations coming forward in the Moray Local Development Plan 2020.

TOWN	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
ABERLOUR					0	0	0	20	20	12	12	48
ALVES												250
ARCHIESTOWN									3	3	3	26
BUCKIE	65	41	47	31	13	56	38	39	25	35	44	940
BURGHEAD	4	4	4								31	135
CRAIGELLACHIE									5		12	5
CULLEN										5	10	40
CUMMINGSTON		1	0	0	0	0	1	1	1			
DALLAS												10
DUFFTOWN	0	9	15					6		20	0	80
DYKE			0			2	3	5	4	1		5
ELGIN	92	177	170	155	189	200	59	150	212	204	174	6197
FINDHORN				17	3	1	3	10	1	20	18	
FINDOCHTY											15	40
FOCHABERS	4	8	4	3	24	6	5	12	10	10	15	149
FORRES	83	29	13	63	59	48	9	37	61	71	70	1610
GARMOUTH/KINGSTON												10
HOPEMAN							22	10	10	10	10	35
KEITH	7	3	22	25	4	12	6	28	21	20	20	226
KINLOSS	0	0		0	0	1	0	3	6	6	9	13
LHANBRYDE									10	15	25	50
LOSSIEMOUTH	6	14	9	6	16	23	20	35	29	10	10	191
MOSSTODLOCH								10	15	15	25	84
NEWMILL												10
PORTGORDON											10	30
PORTKNOCKIE											12	38
RAFFORD												12
REMAINDER OF MORAY	50	50	50	50	50	65	20	40	40	40	40	40
ROTHES											15	55
ROTHIEMAY			1									29
URQUHART								5	5	4	4	10
<b>Total</b>	<b>311</b>	<b>336</b>	<b>335</b>	<b>350</b>	<b>358</b>	<b>414</b>	<b>186</b>	<b>411</b>	<b>478</b>	<b>501</b>	<b>584</b>	<b>10,368</b>

The following definitions and classification in the schedules apply:

### Housing Sites - SITE DETAILS GLOSSARY

<b>Site Ref</b>	Area/Settlement or Parish/Residential/Sequential Reference Number.
<b>Location</b>	Address of Site.
<b>Owner</b>	Current owner of the site.
<b>Developer</b>	Agency responsible for the development and management of the site and not necessarily to the actual construction company.
<b>Tenure</b>	Five tenure types are specified:- HA - Housing Association for rent LA - Local Authority PRIV - Private MOD - Ministry of Defence Other - Other tenure, i.e. housing association shared ownership or low cost home ownership and joint venture between a local authority and a private developer.
<b>Area</b>	Site areas are quoted in hectares and represent the gross area of the site.
<b>Units</b>	The capacity of sites is expressed as a number of house units. For sites where no detailed housing layout has yet been prepared and no density has been specified, then an estimate has been made.
<b>Serviced</b>	Indicates the number of housing units which are serviced.
<b>Not built</b>	Total number of house units on the site which have not yet been built at the date of the update.
<b>Effective</b>	Currently effective (EFF) or constrained (CON)
<b>LPR</b>	Local Plan Site Reference
<b>Land Use</b>	Categorises the main existing or former use of a site before it is re-zoned or developed. The land use categories used are:-  AGR 1-7      Agricultural Land by Class (1, 2 & 3. 1 = prime) AG BLDG      Agricultural Building WOOD      Woodlands (may also be grazed) HORT      Allotments and nurseries PRIV/PUB OS      Privately or publicly owned open space (e.g. Grounds of a large house or hospital)  RESID      Residential COMM      Commercial EDUC      Educational RAIL      Railway MOD      Ministry of Defence PUB BLD      Public Building UNUSED      Derelict, Vacant, Backland etc. COMMTY      Community IND      Industry
<b>Greenfield/ Brownfield</b>	Describes whether the site is within an urban area or previously developed (brownfield) or outwith the urban area and not previously developed (greenfield).



## APPLICATION DETAILS

<b>Applic Ref</b>	Reference number of planning applications relating to the development of the site. Note where applications are made for individual plots within a site, these have been grouped together under the Application Reference 'Individs' with no decision date given.
<b>Units</b>	Number of units relating to each planning application.
<b>Type</b>	Describes the type of permission application:- OUT      Application for Outline Planning Permission DET      Application for Full Permission or Permission of Reserved Matters
<b>Decision</b>	Details of decision on the application. Apart from self explanatory terms – Approved, Refused, Withdrawn, Expired, Pending, it has been necessary to indicate the latest classified either as 'Superseded' or 'Duplicate'.
<b>Dec. Date</b>	Date of final decision on the application.

## COMPLETION DETAILS

<b>Built</b>	Take up rates (in house units) for the previous 5 years are listed on an annual basis and assessments of subsequent completions are also listed annually for the next 5 years.
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