# Strategic Development Plan

## Proposed Plan - Background Report

January 2016

Land Supply for Housing Monitoring Report 2013

Clydeplan
Glasgow and the Clyde Valley
Strategic Development Planning Authority

Clydeplan

Glasgow and the Clyde Valley
Strategic Development Planning Authority

# STRATEGIC DEVELOPMENT PLAN

# PROPOSED PLAN

*Commonwealth Games Legacy Housing, June 2015*

# BACKGROUND REPORT 7

# LAND SUPPLY FOR HOUSING MONITORING REPORT 2013

## January 2016

East Dunbartonshire Council, East Renfrewshire Council, Glasgow City Council, Inverclyde Council, North Lanarkshire Council, Renfrewshire Council, South Lanarkshire Council, West Dunbartonshire Council

# Contents

# 1. Introduction

1.1 The Glasgow and Clyde Valley Strategic Development Plan (May 2012) sets out a Vision based on a ‘compact city model’. It seeks to focus development on the regeneration of the city region’s urban areas by meeting the housing need and demand of communities.

1.2 This monitoring report relates to the land supply and housing completions in the Development Plan area for the period 1st April 2012 to 31st March 2013.

## *Monitoring process*

1.3 Each of the eight constituent Glasgow and the Clyde Valley local authorities undertook a detailed housing land audit and, in collaboration with Homes for Scotland, sites were assessed to establish their effectiveness and agree their programming.

1.4 Sites where there was a disagreement over programming or effectiveness between the local authority and Homes for Scotland were recorded as disputed sites however the vast majority (92%) of the land supply was agreed.

1.5 To ensure consistency and compatibility of data across the Strategic Development Plan (SDP) area the monitoring process is undertaken in accordance with agreed definitions and processes documented in the Housing Land Audit Guidance Notes 2013 published in April 2013. The guidance reflects PAN2/2010 on Housing Land Audits.

## *Changes in Monitoring*

1.6 As with any long term monitoring process, priorities and focus change over time. Recent changes to the monitoring of housing land have involved the inclusion of alternative tenures from the traditional private and social rent sectors e.g. shared equity and low cost home ownership. Although an attempt has been made to remain consistent in the way figures are calculated, the changes to tenure definitions may limit the ability to draw a direct comparison with previous monitoring reports or the Housing Need and Demand Assessment (HNDA) reports.

1.7 Note that the Glasgow and the Clyde Valley Housing Need and Demand Assessment (May 2015) uses specific definitions of ‘Private Sector’ and ‘Social Rent and Below Market Rent Sector’ which do not directly correlate with the definitions used in this report.

## *Format of Report*

1.8 The report is presented in two sections, the first focuses on a written analysis of the data and the second (in the Annex) covers the summarised data in tabular format.

# 2. Spatial Development Strategy

## *Flagship sites delivering*

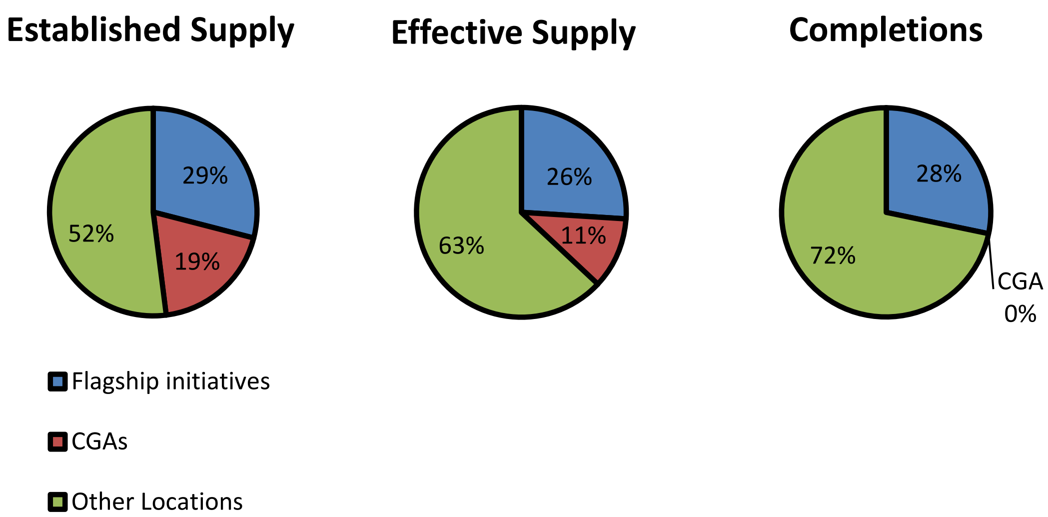
2.1 The key mechanism in the SDP for delivering ***brownfield regeneration*** is the promotion of the Flagship Initiatives at Clyde Waterfront, Clyde Gateway, and Ravenscraig. These initiatives are a cornerstone of the effective supply and have continued to deliver units in 2013.

2.2 76 sites accounting for 28% (1,274 units) of the total completions were located in the flagship areas. Of this 88% (1,119 units) were brownfield completions and 12% (155 units) were greenfield.

2.3 There is a clear focus on brownfield regeneration in these areas with 31 brownfield sites fully completed whereas only 2 greenfield sites were completed in 2013.

2.4 The 2013 capacity of the flagship areas was 33,836 units with 35% (11,918 units) considered effective. The programming over the effective period was for around 1,700 units per year.

2.5 The charts below put the Flagship Initiative areas' contribution into context. In relation to the all tenure supplies the Flagship Initiatives accounted for 29% of the established supply, 26% of the effective supply and 28% of all completions.

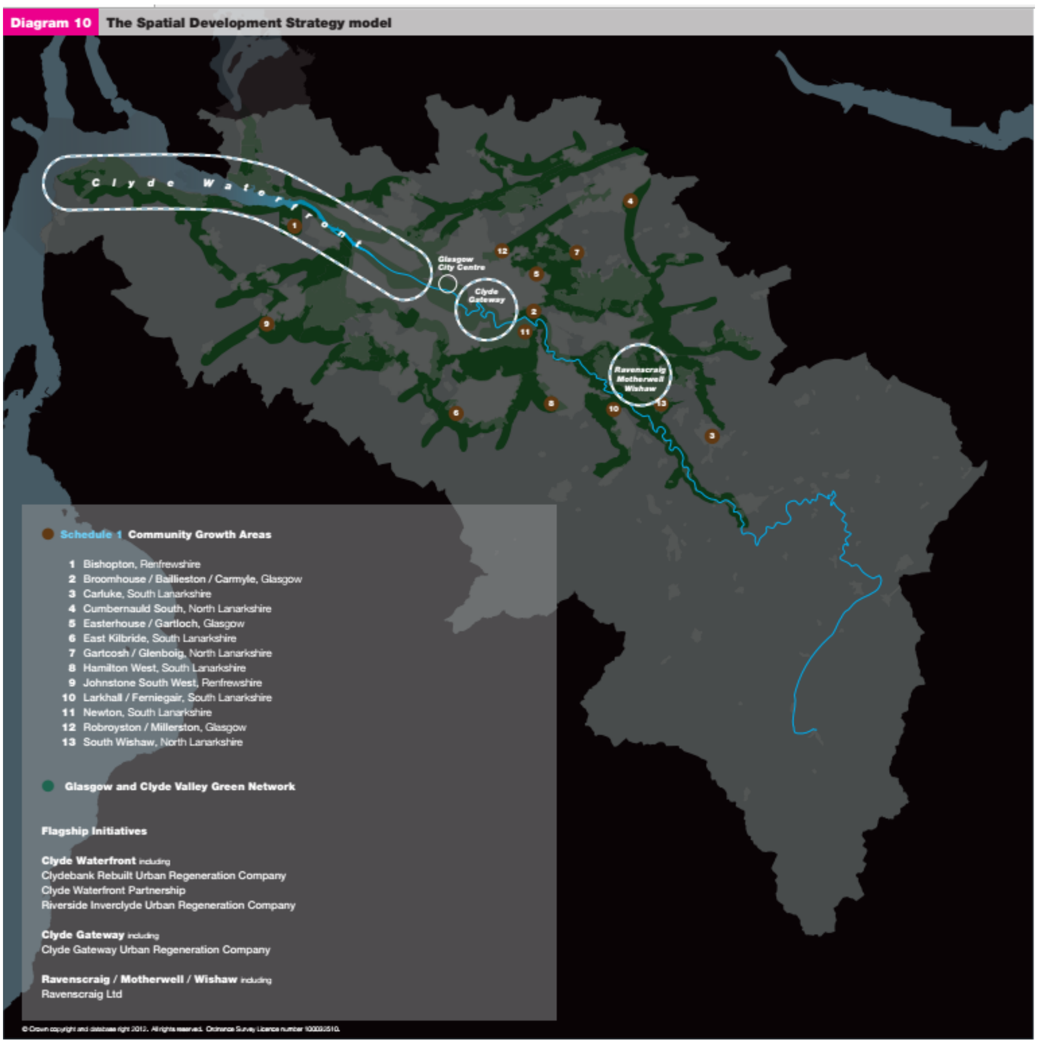



2.6 The Flagship initiatives continue to underpin the regeneration agenda set by the Strategic Development Plan. These areas are delivering and, although their level of effectiveness (35%) falls below that of the Clydeplan area overall (39%), they look set to continue to play an important role in delivering the brownfield regeneration agenda.

2.7 Programming suggests that they will continue to deliver over the next 7 years but it will be important to track whether the predicted increases in delivery are realised.

## *Community Growth Areas yet to impact on completion levels*

2.8 The SDP set out an ambitious growth scenario and put in place Community Growth Areas (CGA) as a mechanism to support medium to longer term growth. They are generally located in greenfield locations close to established public transport links and aim to achieve multiple social, economic and environmental benefits. These sites have still to generate completions.




*Spatial Development Strategy model for Glasgow and the Clyde Valley Strategic Development Plan (May 2012)*

2.9 The 13 CGAs are currently comprised of 24 individual land parcels which in turn are subdivided into individual development phases. In total the CGAs are currently represented by over 80 sites within the Housing Land Audit.

2.10 The estimated capacity of these sites in 2013 was 22,144 units (based on the Housing Land Audit data) with 23% (5,032 units) of them programmed for the effective period.

2.11 The effective period programming was as follows:

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|---|---|---|---|---|---|---|
| **Programmed units** | 125 | 129 | 411 | 782 | 1,022 | 1,205 | 1,358 |

2.12 The programming indicates that although the CGAs will begin to generate completions in 2014 they will not significantly impact on completions levels until at least 2020 where 1,358 units are programmed (equivalent to the delivery of around 100 units for each CGA).

2.13 There are fifteen sites programmed to complete within the effective period, accounting for 1,072 units. The first CGAs that are programmed to deliver are:

- Baillieston/Broomhouse/Carmyle,
- Bishopton,
- Johnstone South West, and
- Larkhall/Ferniegair.

2.14 Long lead-in times are to be expected for this scale of development and seven of the CGAs have component sites which have **no** completions programmed for them by the end of 2020 (accounting for 3,538 units or 16% of the total CGA units). These sites are part of:

- Carluke,
- Easterhouse,
- East Kilbride,
- Gartcosh/Glenboig,
- Johnstone South West,
- Larkhall/Ferniegar, and
- Newton.

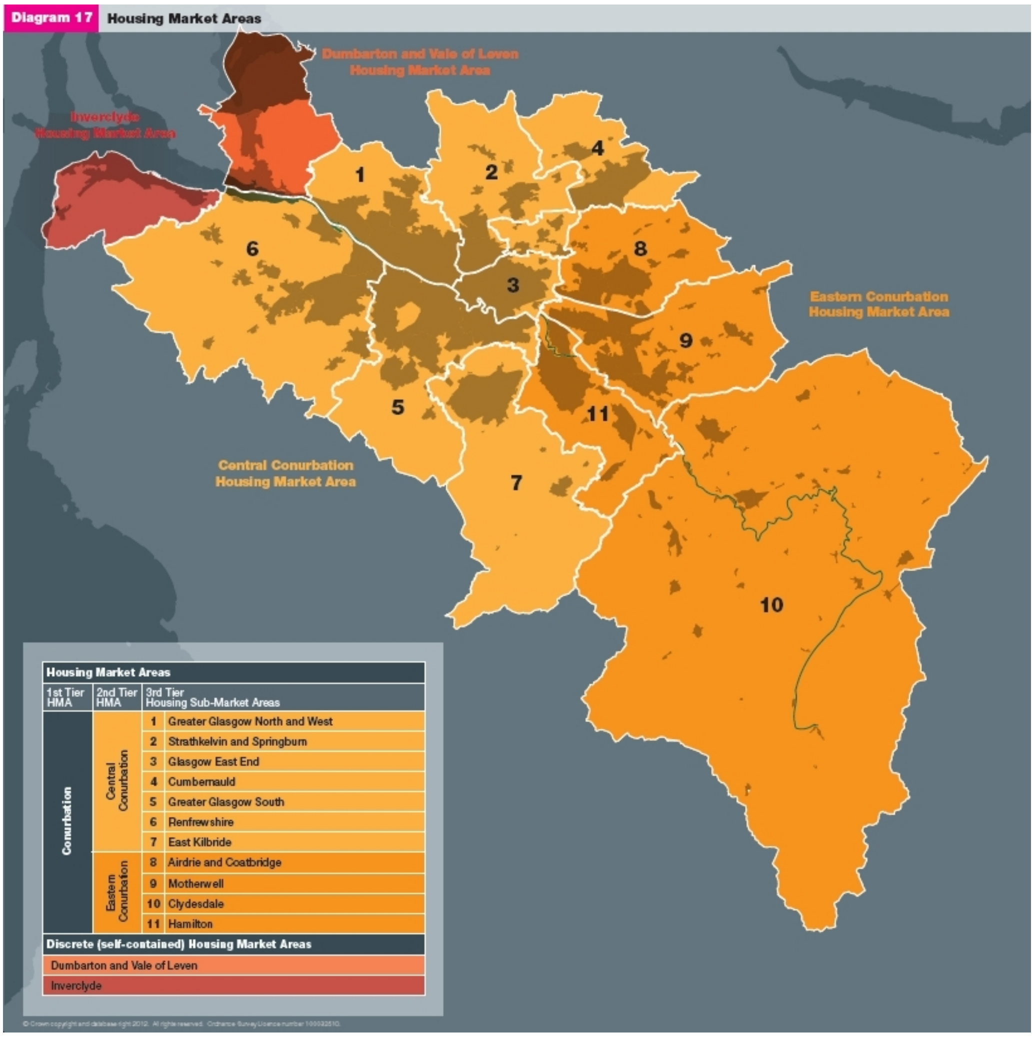
2.15 Although they have been slow to deliver completions, the CGAs remain a significant component of the medium to long term growth strategy of the city region with completions programmed throughout the effective period (and capacity to deliver beyond 2020). To put their contribution in context, they accounted for 19% of the all tenure established supply, 11% of the effective supply and none of the completions in 2013 – see pie charts at paragraph 2.5.

2.16 Note that more information and a detailed breakdown of Community Growth Areas was completed as the Annex to the monitoring report that accompanied the Main Issues Report (MIR) 2015 (pages 72 – 140). Figures above are based on the Housing Land Audit data and may differ to the monitoring report due to minor updates to the 2013 data following the publication of the MIR.

# 3. Housing Market Area Framework (HMA)

## *Private Tenure Housing Supply by HMA*

3.1 The Glasgow and the Clyde Valley Strategic Development Plan (May 2012) used the *Housing Market Area (HMA) framework* as the principal geography for the Housing Need and Demand Assessment for the private sector. This section details the 2013 position compared with the 2009/2016 baseline.




*Housing Market Area framework for Glasgow and the Clyde Valley Strategic Development Plan (May 2012)*

3.2 The HMA framework consists of the **Conurbation** (sub-divided into the Central Conurbation and the Eastern Conurbation) and the discrete housing market areas **Dumbarton and the Vale of Leven** in West Dunbartonshire and the part of **Inverclyde** not including Kilmacolm and Quarriers Village (the darkest orange and red areas shown on the map above). Note that units within the Loch Lomond and the Trossachs national park are now excluded from the figures (the brown area at the top left of the map).

3.3 The following tables summarise the main supplies. Change is highlighted in RED. Note that there has been a decrease in unit numbers in most areas *except* for the programming of effective greenfield units in the Central Conurbation and completions in Dumbarton and the Vale of Leven.

| | | | |
|---|---|---|---|
| **Conurbation** | | | The Conurbation HMA broadly covers the Development Plan area including Kilmacolm and Quarriers Village but excluding the rest of Inverclyde Council area and the Dumbarton and Vale of Leven area of West Dunbartonshire. It is composed of a combination of the Central and Eastern Conurbation HMAs. |
| Established Land Supply | **All** | **95,722** | This is a decrease of **6,484** units (down 6%) on the 2009 supply (102,206). |
| | Brownfield | 57,973 | |
| | Greenfield | 37,749 | |
| Effective Land Supply | **All** | **32,588** | This is a decrease of **4,916** units (down 13%) on the 2009/16 supply (37,504). |
| | Brownfield | 20,131 | This is a decrease of **5,787** units (down 22%) on the 2009/16 supply (25,918). |
| | Greenfield | 12,457 | This is an increase of **871** units (up 8%) on the 2009/16 supply (11,586). |
| Completions | **All** | **2,737** | This is a decrease of **2,433** units (down 47%) from 2008/09 (5,170) |
| | Brownfield | 1,916 | |
| | Greenfield | 821 | |
| **Central Conurbation** | | | This HMA broadly covers the East Dunbartonshire, East Renfrewshire, Glasgow, and Renfrewshire Council areas, together with the Cumbernauld, Kilsyth and Moodiesburn areas of North Lanarkshire Council, the Clydebank area of West Dunbartonshire Council, and the East Kilbride, Cambuslang and Rutherglen areas of South Lanarkshire Council. |
| Established Land Supply | **All** | **70,071** | This is a decrease of **4,894** units (down 7%) on the 2009 supply (74,965). |
| | Brownfield | 44,618 | |
| | Greenfield | 25,453 | |
| Effective Land Supply | **All** | **25,491** | This is a decrease of **2,032** units (down 7%) on the 2009/16 supply (27,523). |
| | Brownfield | 15,425 | This is a decrease of **3,843** units (down 20%) on the 2009/16 supply (19,268). |
| | Greenfield | 10,066 | This is an increase of **1,811** units (up 22%) on the 2009/16 supply (8,255). |
| Completions | **All** | **2,036** | This is a decrease of **1,578** units (44%) from 2008/09 (3,614) |
| | Brownfield | 1,343 | |
| | Greenfield | 693 | |
| **Eastern Conurbation** | | | The Eastern Conurbation HMA broadly includes the North Lanarkshire Council area, (excluding the Cumbernauld, Kilsyth and Moodiesburn areas) and the South Lanarkshire Council area (excluding the East Kilbride, Cambuslang and Rutherglen areas). |
| Established Land Supply | **All** | **25,651** | This is a decrease of 1**,590** units (down 6%) on the 2009 supply (27,241). |
| | Brownfield | 13,355 | |
| | Greenfield | 12,296 | |
| Effective Land Supply | **All** | **7,097** | This is a decrease of **2,884** units (down 29%) on the 2009/16 supply (9,981). |
| | Brownfield | **4,706** | This is a decrease of **1,944** units (down 29%) on the 2009/16 supply (6,650). |
| | Greenfield | **2,391** | This is a decrease of **940** units (down 28%) on the 2009/16 supply (3,331). |
| Completions | **All** | 701 | This is a decrease of **855** units (down 55%) from 2008/09 (1,556) |
| | Brownfield | 573 | |
| | Greenfield | 128 | |

| **Dumbarton and Vale of Leven** | | | This HMA is formed from a combination of the areas around Dumbarton and Vale of Leven within West Dunbartonshire. The area is considered highly self-contained and has historically been monitored separately from the Conurbation HMA. For the first time this year the figures exclude units located within the Loch Lomond and the Trossachs National Park which are now dealt with by the relevant authority for the park. A small reduction in the totals is due to this change in monitoring |
|---|---|---|---|
| Established Land Supply | **All** | **2,351** | This is an increase of **36** units (up 2%) on the 2009 supply (2,315). |
| | Brownfield | 2,161 | |
| | Greenfield | 190 | |
| Effective Land Supply | **All** | **1,146** | This is a decrease of **604** units (down 35%) on the 2009/16 supply (1,750). |
| | Brownfield | **1,031** | This is a decrease of **604** units (down 37%) on the 2009/16 supply (1,635). |
| | Greenfield | **115** | This is the same as the 2009/16 supply (115). |
| Completions | **All** | 137 | This is an increase of **58** units (up 73%) from 2008/09 (79) |
| | Brownfield | 137 | |
| | Greenfield | 0 | |

| **Inverclyde** | | | The Inverclyde HMA is formed from the Inverclyde Council area, excluding Kilmacolm and Quarriers Village. The area is considered highly self-contained and has historically been included and monitored accordingly. |
|---|---|---|---|
| Established Land Supply | **All** | **3,280** | This is a decrease of **372** units (down 10%) on the 2009 supply (3,652). |
| | Brownfield | 2,343 | |
| | Greenfield | 937 | |
| Effective Land Supply | **All** | **987** | This is a decrease of **713** units (down 42%) on the 2009/16 supply (1,700). |
| | Brownfield | **618** | This is a decrease of **571** units (down 48%) on the 2009/16 supply (1,189). |
| | Greenfield | **369** | This is a decrease of **142** units (down 28%) on the 2009/16 supply (511). |
| **Completions** | **All** | 93 | This is a decrease of **57** units (down 38%) from 2008/09 (150) |
| | Brownfield | 53 | |
| | Greenfield | 40 | |

3.4 The tables show the headline figures for the HMA framework areas. See the Annex for more detailed breakdowns.

## *Social Housing Sector Completions*

3.5 Long term records for social housing completions have not routinely been collated using the Clydeplan Housing Land Audit data (although Annex Part B – tables 6 to 8 provide details for 2012-13). This year's data (2012-13) shows an increase in established supply (up 17% by 2,066 units), an increase in effective supply (up 24% by 1,941 units), but a decrease in completions (down 38% by 861 units) on last year's (2011-12) figures.

3.6 For an indication of longer term trends for social housing sector completions, national data can be used. Figures have been published using the NB1 returns that Local Authorities are required to submit to the Scottish Government which show units which are complete (but not necessarily occupied). The table below is an extract for the Clydeplan authorities using data from Scottish Government (http://www.gov.scot/Topics/Statistics/Browse/Housing-Regeneration/HSfS/NewBuildSocSec). More information on how these figures are derived can be found on the Scottish Government website.

3.7 It should be noted that the NB1 figures account for more completions than those recorded by the HLA for the period (2011-12 and 2012-13). This is likely because of the way completions are recorded by each survey (the NB1 returns do not require the units to be occupied while the HLA requires them to be complete and occupied). Over a longer period the total completions would be expected to align.

| | 1996-97 | 1997-98 | 1998-99 | 1999-00 | 2000-01 | 2001-02 | 2002-03 | 2003-04 | 2004-05 | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 | 2012-13 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **East Dunbartonshire** | 0 | 0 | 22 | 15 | 16 | 49 | 0 | 4 | 7 | 142 | 0 | 26 | 42 | 26 | 133 | 30 | 157 |
| **East Renfrewshire** | 16 | 17 | 0 | 113 | 30 | 41 | 30 | 0 | 19 | 46 | 37 | 0 | 20 | 119 | 57 | 15 | 119 |
| **Glasgow City** | 470 | 820 | 287 | 690 | 1,115 | 1,033 | 1,012 | 1,239 | 802 | 951 | 821 | 773 | 756 | 922 | 1,090 | 1,202 | 590 |
| **Inverclyde** | 0 | 33 | 133 | 52 | 164 | 113 | 69 | 101 | 103 | 117 | 8 | 58 | 85 | 336 | 25 | 376 | 159 |
| **North Lanarkshire** | 200 | 271 | 30 | 327 | 187 | 205 | 267 | 144 | 123 | 442 | 82 | 65 | 232 | 244 | 251 | 165 | 166 |
| **Renfrewshire** | 118 | 10 | 36 | 45 | 163 | 138 | 136 | 78 | 165 | 278 | 98 | 115 | 80 | 109 | 90 | 236 | 175 |
| **South Lanarkshire** | 58 | 230 | 0 | 105 | 108 | 138 | 182 | 111 | 285 | 136 | 154 | 134 | 278 | 359 | 56 | 243 | 247 |
| **West Dunbartonshire** | 0 | 0 | 187 | 52 | 174 | 156 | 123 | 110 | 121 | 241 | 71 | 48 | 51 | 78 | 48 | 217 | 13 |
| **Clydeplan (NB1)** | 862 | 1,381 | 695 | 1,399 | 1,957 | 1,873 | 1,819 | 1,787 | 1,625 | 2,353 | 1,271 | 1,219 | 1,544 | 2,193 | 1,750 | 2,484 | 1,626 |
| **Clydeplan % of Scotland Total** | 27% | 30% | 37% | 35% | 50% | 44% | 48% | 53% | 40% | 50% | 39% | 30% | 31% | 37% | 31% | 42% | 39% |
| **SCOTLAND** | 3,204 | 4,603 | 1,873 | 4,033 | 3,916 | 4,262 | 3,809 | 3,368 | 4,024 | 4,698 | 3,237 | 4,125 | 4,913 | 5,989 | 5,725 | 5,890 | 4,207 |

*Source: NB1 returns by local authorities to the Scottish Government, Communities Analytical Services (Housing Statistics)*

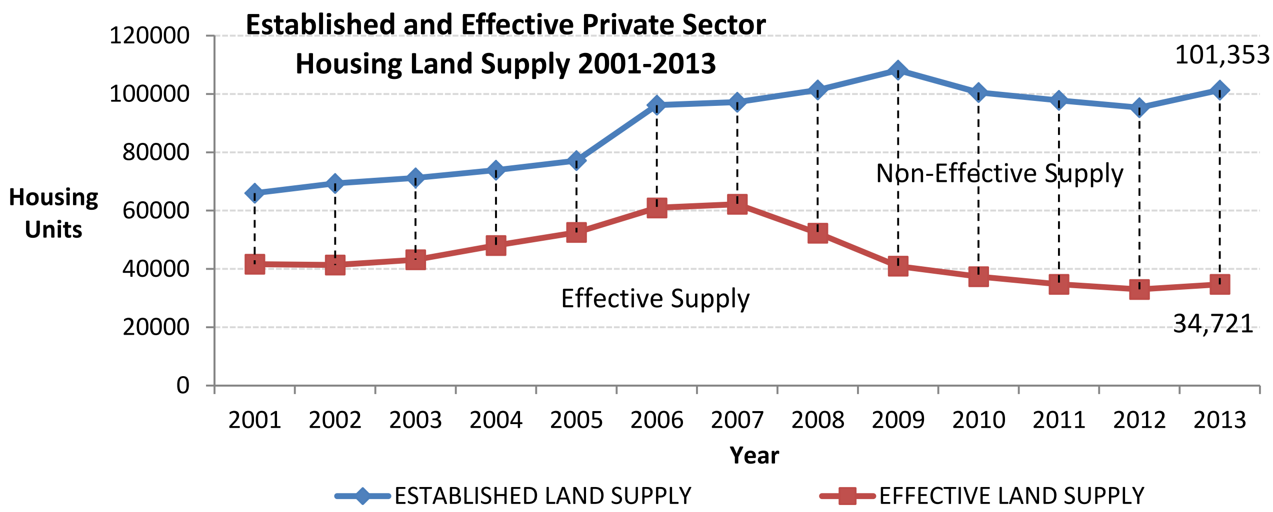
3.8 The figures indicate that the Clydeplan area is a major source of Scotland's social housing sector completions for the 2012-13 period (39%) and overall it has provided 39% for the period 1996-2013 or an average of 1,638 units a year.

# 4. Land Supply Trends

*Long-term Trends – Established and Effective Supplies*

4.1 The financial crisis and the subsequent drop in completions of new homes has focused the government on delivery. The main tools available to Planning Authorities are the ability to add or remove land at Development Plan reviews and the ability to grant planning permissions.

4.2 The following discussion focuses on **private tenure** housing land and whether there is a link between the established land supplies recorded by Planning Authorities and the delivery of new homes. The graph below summarises the period 2001-2013.




4.3 The established supply has increased 65% (from 66,000 to 101,353 units) in 12 years as a result of units being added to the supply quicker than they were developed.

4.4 Over the past 7 years however (since 2006), the established land supply has increased overall by only 5,188 units. During this period there have been additions to the supply and completions, however there have been sustained drops in the overall established supply from 2010-2012 which do not correlate with higher completions for those years and are more likely to be the result of capacity reductions or land being removed from the supply in light of the new financial landscape.

4.5 Generally, there appears to have been a correlation between the established and effective supply from 2001-2007 with around 60% consistently being considered effective over that period. Following the financial crisis there was a 2 year divergence before the land supplies again correlate at around 35% being considered effective between 2009 and 2013. It is not clear that they are set to move from this correlation without significant improvement in market conditions.

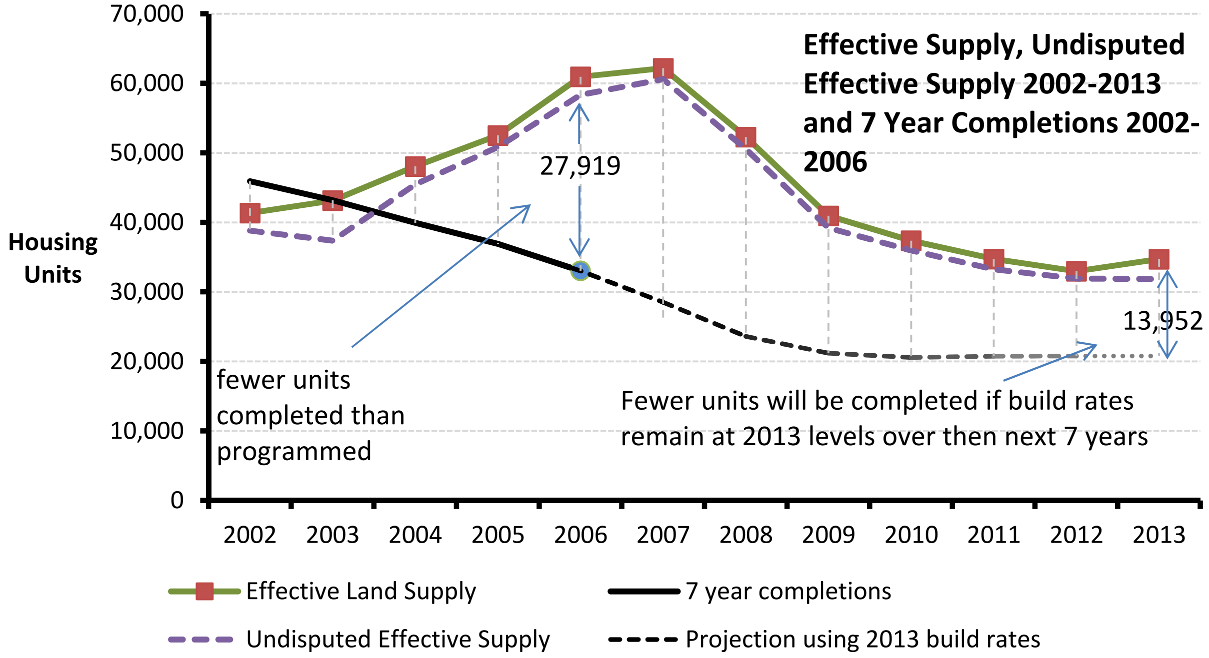
## *Long-term Trends – Effective Supplies and 7 Year Completions*

4.6 Key to considering whether the correlation between the established supply and the effective supply is significant to delivery, is establishing the degree of the linkage between the effective supply and delivery in completions.

4.7 The graph below draws together several data sources. It shows the private tenure effective supply (in green with red squares) reflecting the programming for the following 7 years. It also shows the element of that supply that was not disputed - the 'Undisputed Effective Supply' (in purple).

4.8 The first thing to note is that these two supplies follow a similar trend over the period, rising to 2007 then falling back again. The undisputed supply has generally been around 2,200 units lower than the effective supply.

4.9 The second notable point is that 2013 records only the second time these supplies have diverged. The undisputed supply dropped by 51 units while the effective supply rose by around 1,739 units.




4.10 The graph also shows the actual 7 year completions (in black) for the equivalent effective supply period. That is the annual completions for the *next* 7 years. Note that the blue dot at 2006 marks the most recent full 7 year completions available for comparison (2007-2013).

4.11 The first thing to note here is that this does not follow the effective supply 'peak and fall' trend. Instead, the cumulative effect of the financial crash is clearly identifiable in the fall in completions from 2002 onwards. Overall the picture is one of a steadily decreasing delivery of units not reflected by the effective programming for the same years. Programming and completions have at times been significantly out of alignment, with the peak of the effective supply in 2006 suggesting 60,951 units would be completed but only 54% (33,032 units) were actually built.

4.12 The other notable element is that for the period 2003-2010, the highest level of 7 year completions, saw 4,569 more units completed than had been programmed for the same period. This would appear to indicate that there was an element of flexibility in the effective supply to react to the need for *additional* units either by bringing forward non-effective supply sites or through windfall additions.

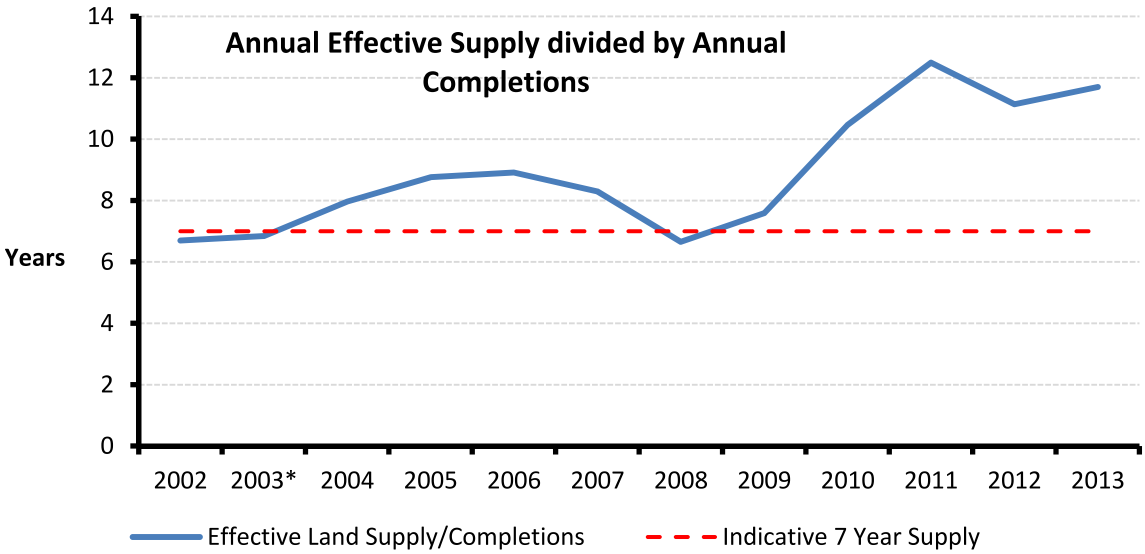
4.13 For indicative purposes only, the graph also projects the potential 7 year completions levels forward from 2007 using 2013 delivery levels in an attempt to indicate what will happen should the market remain consistent with current conditions (the black dashed line) - although it must be acknowledged that improvement is programmed and anticipated to bring the completions in line with the effective supply by 2013.

4.14 Overall, a link is difficult to establish between the programmed effective supply and the 7 year completions over the period examined (2002-2006).

*Relationship between Completions compared with Effective Supply*

4.15 The appropriate method for assessing the future housing land requirement is through a full assessment of need and demand as set out in Scottish Planning Policy. However, with a particular focus on delivery, the following assessment considers the relationship between the effective land supply and completions in more detail. Specifically whether there is a link between the most recent completions and the effective programming of the next 7 years.

4.16 The graph below shows the annual effective supply divided by the annual completions. It shows, for example, that 2013 has an effective supply that is around 12 times the level of completions (i.e. it would take 12 years at 2013 build rates to complete the 2013 effective supply). For a period of sustainable growth the Blue line would be expected to run close to the 7 year Red dashed line showing a steady correlation between completions and effectiveness.




4.17 The graph shows a ‘bump’ (2004-2007) which reflects a period where the expectation was for completion growth which outstripped the actual completion growth around the time of the peak annual completions period. This ‘bump’ is followed by a 2008 dip which reflects an industry-wide re-assessment at the time of the financial crash.

4.18 From then on (2009-2013), an optimistic view of effectiveness relative to completions growth exceeds even that of the peak period. This disconnect is evident for the past three years and undermines any link between the effective supply programming and delivery in recent years.

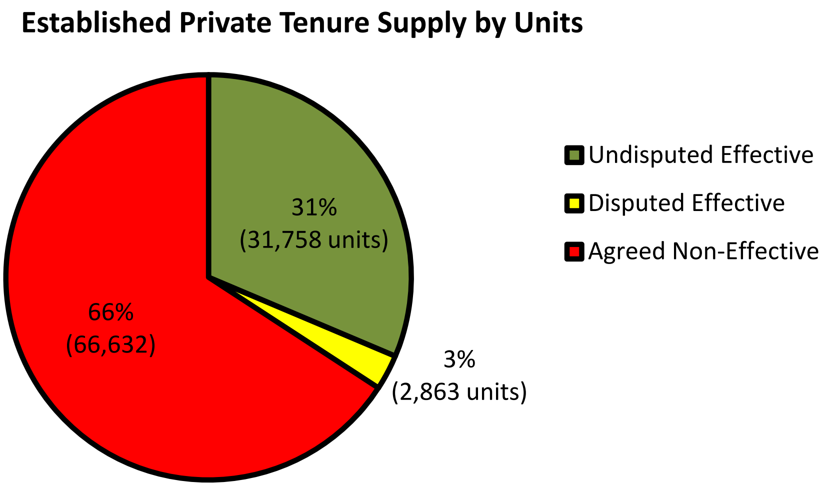
4.19 As an overall outlook the effective supply has generally presented optimistic programming relative to delivery, especially in the years following the financial crisis (2010-2013). The link between the effective supply and 7 year completions is weak but understandably is affected by the financial crash. Looking forward, 2013 is very optimistic in comparison with build rates but no more optimistic than 2010-2012.

4.20 Taking the above into consideration, and relevant to the land supply in Clydeplan, (i.e. this may not be relevant in other areas or at different geographic level), it is difficult to find a correlation between delivery and the effective supply, either between the effective supply and the subsequent 7 year completion levels or between the effective supply and the current build rates during the post-recession period.

## *Homes for Scotland Disputed Sites*

4.21 Estimating effectiveness and programming involves a collaborative effort between Local Authorities and Homes for Scotland and 92% of the effective supply was agreed in 2013.

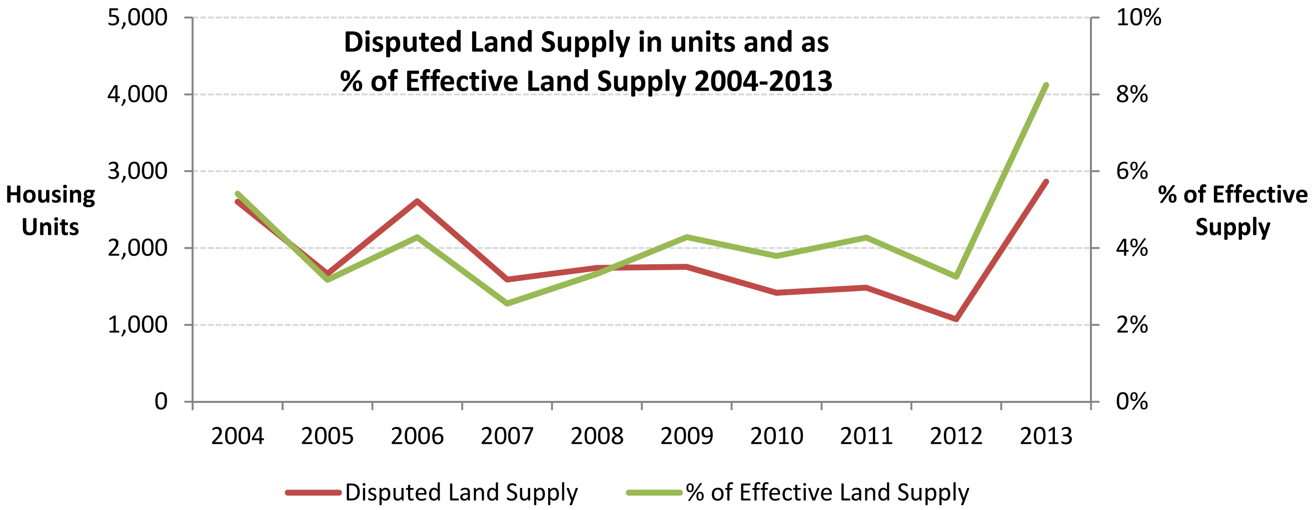
4.22 However, there are occasions where the Local Authority considers a site effective and its programming reasonable but Homes for Scotland disagree, either wholly or in part. On these occasions the outstanding units are recorded as **disputed**.




4.23 Disputed sites are recorded for private tenure units only. They accounted for 3% of the private tenure established land supply in 2013.

4.24 There were 61 sites, accounting for 2,863 units that were disputed. The entire capacity of 44 sites, accounting for 1,960 units, was disputed while part disputes were recorded for 17 other sites, accounting for 903 units.

4.25 The level of dispute in 2013 was higher, proportionally and in terms of units than at any time in the past 10 years and equated to 8% of the effective private tenure supply (up from 3% in 2012 - its lowest level in 10 years).



4.26 The fluctuation of these figures, from relatively low levels of dispute to a higher level would appear to reflect the continuing uncertainty in the market and the difficulty in assessing effectiveness and predicting programming over a 7 year period and it will be important to continue to work with Homes for Scotland to improve market knowledge and share expertise.

*Where development has happened*

4.27 Overall, completions are significantly down on the peak periods with 4,506 all tenure units completed of which 2,967 units were private tenure. The picture is not consistent across Housing Sub-Market areas and Local Authorities.

4.28 With regards to Local Authorities, the main areas of activity were Glasgow, North Lanarkshire and South Lanarkshire. These Authorities also contributed significantly to the private and affordable supplies while Renfrewshire and East Dunbartonshire also contributed to a notable proportion of Affordable completions.

| | PRIVATE | | AFFORDABLE | | ALL TENURE | |
|---|---|---|---|---|---|---|
| **LOCAL AUTHORITIES** | **units** | **%** | **units** | **%** | **units** | **%** |
| East Dunbartonshire | 241 | 8% | 176 | 11% | 417 | 9% |
| East Renfrewshire | 168 | 6% | 86 | 6% | 254 | 6% |
| City of Glasgow | 802 | 27% | 595 | 39% | 1,397 | 31% |
| Inverclyde | 95 | 3% | 114 | 7% | 209 | 5% |
| North Lanarkshire | 629 | 21% | 194 | 13% | 823 | 18% |
| Renfrewshire | 251 | 8% | 173 | 11% | 424 | 9% |
| South Lanarkshire | 638 | 22% | 150 | 10% | 788 | 17% |
| West Dunbartonshire | 143 | 5% | 51 | 3% | 194 | 4% |
| **CLYDEPLAN** | **2,967** | **100%** | **1,539** | **100%** | **4,506** | **100%** |

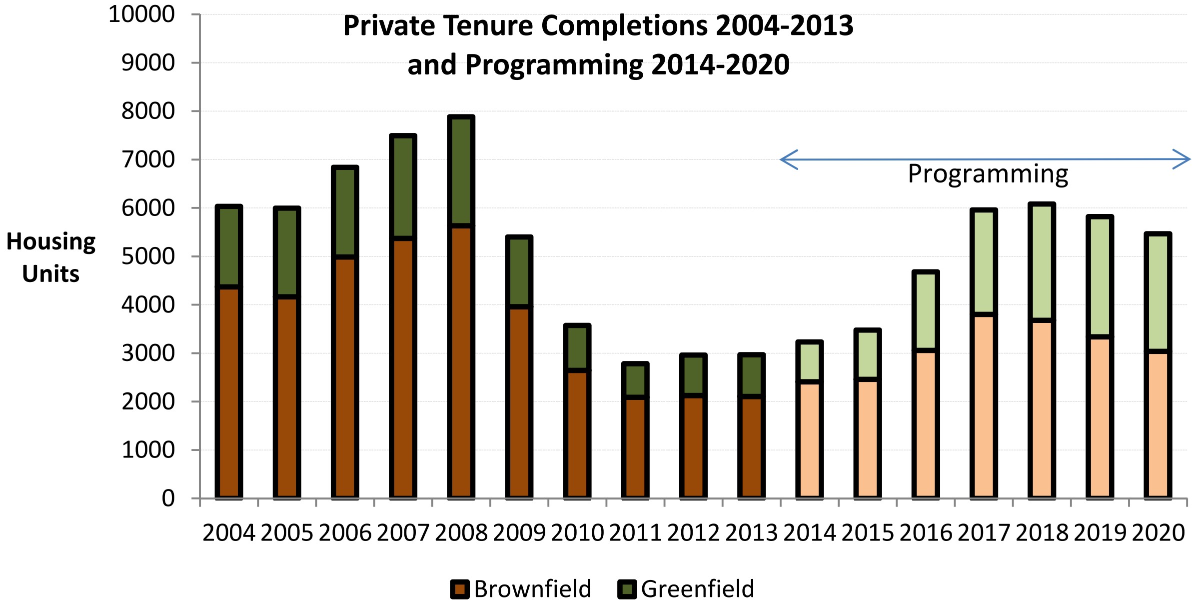
*Local Authority completions as a proportion of Clydeplan total*

4.29 In respect of Housing Sub-Market Areas (HSMAs), the Greater Glasgow South HSMA accounted for 21% of the private tenure completions in 2013. This was double the total of the second largest producing HSMA (11% - Greater Glasgow North West). It was also the location of 35% of all private tenure greenfield completions (306 units).

4.30 The majority of locations continue to be dominated by brownfield supply and brownfield completions. However, this was not the case in Cumbernauld and Clydesdale where the majority of completions in 2013 were greenfield units (noting that they only accounted for 102 and 24 completions respectively).

## *General Outlook*

4.31 The general outlook is one of increased programming levels throughout the effective period compared with 2013 completions. There is a general increase in programming until 2018 where brownfield programming drops back toward current levels pulling the overall completions down with it.




4.32 In terms of Housing Sub-Market Areas, programming suggests that Greater Glasgow South will continue to dominate completions. Renfrewshire will become a main focus of development with the second highest number of projected completions (5,078 units or 15% of the completions) over the effective period.

4.33 Using 2013 completions as a base we can pick out significant change programmed for Cumbernauld (28% increase on current build rates required until 2020), Renfrewshire (25% increase), and Glasgow East (24% increase).

4.34 Conversely, Airdrie and East Kilbride show programming levels remaining similar to 2013 completion levels while Inverclyde and Clydesdale HSMAs are programmed to deliver less than 1,000 units over the entire 7 year period.

4.35 In summary, the picture is not one of uniformity of activity across the region. Glasgow City dominates the completions for 2013, specifically Greater Glasgow South. Programming shows new hotspots appearing in Cumbernauld, where most of the recent supply has been greenfield units, and Renfrewshire, where it has not.

4.36 The historically low level of completions this year, along with the relatively small number of sites considered effective in the next 7 years would appear to confirm the continuing impact of the global economic downturn and the difficulties house-buyers and house-builders have in sourcing finance.

4.37 Although the outlook for effectiveness is generally more positive than current completion levels would suggest, a return to peak pre-recession delivery does not seem imminent.

## ANNEX 1

### PART A - Private Sector Housing Land Supply - 2013



### PART B - Affordable Sector Housing Land Supply – 2013



### PART C - All Tenure Housing Land Supply - 2013



### PART D - Historic Time Series

## ANNEX 1 - Part A - Private Sector Housing Land Supply - 2013

| **TABLE 1: PRIVATE SECTOR: ESTABLISHED LAND SUPPLY 2013** | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **HOUSING MARKET AREAS** | | | | | |
| **1st Tier Housing Market Area** | | | | | |
| Conurbation | 95,722 | 57,973 | 61% | 37,749 | 39% |
| | | | | | |
| **2nd Tier Housing Market Areas** | | | | | |
| Central Conurbation HMA | 70,071 | 44,618 | 64% | 25,453 | 36% |
| Eastern Conurbation HMA | 25,651 | 13,355 | 52% | 12,296 | 48% |
| **2nd Tier Total** | **95,722** | **57,973** | **61%** | **37,749** | **39%** |
| | | | | | |
| **3rd Tier Sub-Market Areas** | | | | | |
| Greater Glasgow North West | 16,176 | 14,561 | 90% | 1,615 | 10% |
| Strathkelvin and Glasgow North East | 5,117 | 2,205 | 43% | 2,912 | 57% |
| Glasgow East | 10,546 | 8,010 | 76% | 2,536 | 24% |
| Cumbernauld | 5,922 | 1,127 | 19% | 4,795 | 81% |
| Greater Glasgow South | 14,166 | 8,599 | 61% | 5,567 | 39% |
| Renfrewshire | 12,773 | 9,275 | 73% | 3,498 | 27% |
| East Kilbride | 5,371 | 841 | 16% | 4,530 | 84% |
| Airdrie and Coatbridge | 4,393 | 2,801 | 64% | 1,592 | 36% |
| Motherwell | 9,179 | 6,438 | 70% | 2,741 | 30% |
| Clydesdale | 4,907 | 1,919 | 39% | 2,988 | 61% |
| Hamilton | 7,172 | 2,197 | 31% | 4,975 | 69% |
| **3rd Tier Total** | **95,722** | **57,973** | **61%** | **37,749** | **39%** |
| | | | | | |
| **Discrete (self-contained HMAs)** | | | | | |
| Dumbarton and Vale of Leven HMA | 2,351 | 2,161 | 92% | 190 | 8% |
| Inverclyde HMA | 3,280 | 2,343 | 71% | 937 | 29% |
| | | | | | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 2,542 | 1,196 | 47% | 1,346 | 53% |
| East Renfrewshire | 4,984 | 1,352 | 27% | 3,632 | 73% |
| City of Glasgow | 35,283 | 28,712 | 81% | 6,571 | 19% |
| Inverclyde | 3,351 | 2,408 | 72% | 943 | 28% |
| North Lanarkshire | 19,494 | 10,366 | 53% | 9,128 | 47% |
| Renfrewshire | 10,123 | 8,234 | 81% | 1,889 | 19% |
| South Lanarkshire | 20,991 | 5,814 | 28% | 15,177 | 72% |
| West Dunbartonshire | 4,585 | 4,395 | 96% | 190 | 4% |
| **COUNCIL TOTAL** | **101,353** | **62,477** | **62%** | **38,876** | **38%** |

Private Sector = Owner Occupied (OO) and Private Rental (PR) Tenures Only

| TABLE 2: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY 2013-20 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **HOUSING MARKET AREAS** | | | | | |
| **1st Tier Housing Market Area** | | | | | |
| Conurbation | 32,588 | 20,131 | 62% | 12,457 | 38% |
| | | | | | |
| **2nd Tier Housing Market Areas** | | | | | |
| Central Conurbation HMA | 25,491 | 15,425 | 61% | 10,066 | 39% |
| Eastern Conurbation HMA | 7,097 | 4,706 | 66% | 2,391 | 34% |
| **2nd Tier Total** | **32,588** | **20,131** | **62%** | **12,457** | **38%** |
| | | | | | |
| **3rd Tier Sub-Market Areas** | | | | | |
| Greater Glasgow North West | 4,011 | 3,543 | 88% | 468 | 12% |
| Strathkelvin and Glasgow North East | 2,336 | 1,073 | 46% | 1,263 | 54% |
| Glasgow East | 3,912 | 2,974 | 76% | 938 | 24% |
| Cumbernauld | 2,860 | 814 | 28% | 2,046 | 72% |
| Greater Glasgow South | 5,749 | 3,139 | 55% | 2,610 | 45% |
| Renfrewshire | 5,078 | 3,575 | 70% | 1,503 | 30% |
| East Kilbride | 1,545 | 307 | 20% | 1,238 | 80% |
| Airdrie and Coatbridge | 1,550 | 1,116 | 72% | 434 | 28% |
| Motherwell | 2,924 | 2,175 | 74% | 749 | 26% |
| Clydesdale | 712 | 240 | 34% | 472 | 66% |
| Hamilton | 1,911 | 1,175 | 61% | 736 | 39% |
| **3rd Tier Total** | **32,588** | **20,131** | **62%** | **12,457** | **38%** |
| | | | | | |
| **Discrete (self-contained HMAs)** | | | | | |
| Dumbarton and Vale of Leven HMA | 1,146 | 1,031 | 90% | 115 | 10% |
| Inverclyde HMA | 987 | 618 | 63% | 369 | 37% |
| | | | | | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 1,534 | 674 | 44% | 860 | 56% |
| East Renfrewshire | 2,069 | 626 | 30% | 1,443 | 70% |
| City of Glasgow | 11,365 | 8,935 | 79% | 2,430 | 21% |
| Inverclyde | 1,021 | 648 | 63% | 373 | 37% |
| North Lanarkshire | 7,334 | 4,105 | 56% | 3,229 | 44% |
| Renfrewshire | 4,256 | 3,117 | 73% | 1,139 | 27% |
| South Lanarkshire | 5,382 | 2,030 | 38% | 3,352 | 62% |
| West Dunbartonshire | 1,760 | 1,645 | 93% | 115 | 7% |
| **COUNCIL TOTAL** | **34,721** | **21,780** | **63%** | **12,941** | **37%** |

Private Sector = Owner Occupied (OO) and Private Rental (PR) Tenures Only

| TABLE 3: PRIVATE SECTOR: COMPLETIONS - 2012/13 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **HOUSING MARKET AREAS** | | | | | |
| **1st Tier Housing Market Area** | | | | | |
| Conurbation | 2,737 | 1,916 | 70% | 821 | 30% |
| | | | | | |
| **2nd Tier Housing Market Areas** | | | | | |
| Central Conurbation HMA | 2,036 | 1,343 | 66% | 693 | 34% |
| Eastern Conurbation HMA | 701 | 573 | 82% | 128 | 18% |
| **2nd Tier Total** | **2,737** | **1,916** | **70%** | **821** | **30%** |
| | | | | | |
| **3rd Tier Sub-Market Areas** | | | | | |
| Greater Glasgow North West | 316 | 260 | 82% | 56 | 18% |
| Strathkelvin and Glasgow North East | 252 | 182 | 72% | 70 | 28% |
| Glasgow East | 209 | 159 | 76% | 50 | 24% |
| Cumbernauld | 137 | 35 | 26% | 102 | 74% |
| Greater Glasgow South | 631 | 325 | 52% | 306 | 48% |
| Renfrewshire | 261 | 250 | 96% | 11 | 4% |
| East Kilbride | 230 | 132 | 57% | 98 | 43% |
| Airdrie and Coatbridge | 212 | 197 | 93% | 15 | 7% |
| Motherwell | 280 | 240 | 86% | 40 | 14% |
| Clydesdale | 39 | 15 | 38% | 24 | 62% |
| Hamilton | 170 | 121 | 71% | 49 | 29% |
| **3rd Tier Total** | **2,737** | **1,916** | **70%** | **821** | **30%** |
| | | | | | |
| **Discrete (self-contained HMAs)** | | | | | |
| Dumbarton and Vale of Leven HMA | 137 | 137 | 100% | 0 | 0% |
| Inverclyde HMA | 93 | 53 | 57% | 40 | 43% |
| | | | | | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 241 | 166 | 69% | 75 | 31% |
| East Renfrewshire | 168 | 45 | 27% | 123 | 73% |
| City of Glasgow | 802 | 664 | 83% | 138 | 17% |
| Inverclyde | 95 | 55 | 58% | 40 | 42% |
| North Lanarkshire | 629 | 472 | 75% | 157 | 25% |
| Renfrewshire | 251 | 240 | 96% | 11 | 4% |
| South Lanarkshire | 638 | 321 | 50% | 317 | 50% |
| West Dunbartonshire | 143 | 143 | 100% | 0 | 0% |
| **COUNCIL TOTAL** | **2,967** | **2,106** | **71%** | **861** | **29%** |

Private Sector = Owner Occupied (OO) and Private Rental (PR) Tenures Only

| TABLE 4: PRIVATE SECTOR: 3rd TIER HOUSING SUB-MARKET AREAS SUMMARY<br>As at 31 March 2013<br>GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | ELS - Total | ELS - Brown | ELS - Green | Eff - Total | Eff - Brown | Eff - Green | Comp - Total | Comp - Brown | Comp - Green |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
| Conurbation (1st Tier HMA) | 95,722 | 57,973 | 37,749 | 32,588 | 20,131 | 12,457 | 2,737 | 1,916 | 821 |
| | | | | | | | | | |
| Central Conurbation (2nd Tier HMA) | 70,071 | 44,618 | 25,453 | 25,491 | 15,425 | 10,066 | 2,036 | 1,343 | 693 |
| **Greater Glasgow North West** (3rd Tier HSMA) | **16,176** | **14,561** | **1,615** | **4,011** | **3,543** | **468** | **316** | **260** | **56** |
| *East Dunbartonshire* | *778* | *336* | *442* | *324* | *132* | *192* | *32* | *22* | *10* |
| *Glasgow City* | *13,164* | *11,991* | *1,173* | *3,073* | *2,797* | *276* | *278* | *232* | *46* |
| *West Dunbartonshire* | *2,234* | *2,234* | *0* | *614* | *614* | *0* | *6* | *6* | *0* |
| **Strathkelvin and Glasgow North East** (3rd Tier HSMA) | **5,117** | **2,205** | **2,912** | **2,336** | **1,073** | **1,263** | **252** | **182** | **70** |
| *East Dunbartonshire* | *1,764* | *860* | *904* | *1,210* | *542* | *668* | *209* | *144* | *65* |
| *Glasgow City* | *3,353* | *1,345* | *2,008* | *1,126* | *531* | *595* | *43* | *38* | *5* |
| **Glasgow East** (3rd Tier HSMA) | **10,546** | **8,010** | **2,536** | **3,912** | **2,974** | **938** | **209** | **159** | **50** |
| **Cumbernauld** (3rd Tier HSMA) | **5,922** | **1,127** | **4,795** | **2,860** | **814** | **2,046** | **137** | **35** | **102** |
| **Greater Glasgow South** (3rd Tier HSMA) | **14,166** | **8,599** | **5,567** | **5,749** | **3,139** | **2,610** | **631** | **325** | **306** |
| *East Renfrewshire* | *2,405* | *376* | *2,029* | *1,281* | *198* | *1,083* | *160* | *37* | *123* |
| *Glasgow City* | *8,220* | *7,366* | *854* | *3,254* | *2,633* | *621* | *272* | *235* | *37* |
| *South Lanarkshire* | *3,541* | *857* | *2,684* | *1,214* | *308* | *906* | *199* | *53* | *146* |
| **Renfrewshire** (3rd Tier HSMA) | **12,773** | **9,275** | **3,498** | **5,078** | **3,575** | **1,503** | **261** | **250** | **11** |
| *East Renfrewshire* | *2,579* | *976* | *1,603* | *788* | *428* | *360* | *8* | *8* | *0* |
| *Inverclyde* | *71* | *65* | *6* | *34* | *30* | *4* | *2* | *2* | *0* |
| *Renfrewshire* | *10,123* | *8,234* | *1,889* | *4,256* | *3,117* | *1,139* | *251* | *240* | *11* |
| **East Kilbride** (3rd Tier HSMA) | **5,371** | **841** | **4,530** | **1,545** | **307** | **1,238** | **230** | **132** | **98** |
| | | | | | | | | | |
| Eastern Conurbation (2nd Tier HMA) | 25,651 | 13,355 | 12,296 | 7,097 | 4,706 | 2,391 | 701 | 573 | 128 |
| **Airdrie and Coatbridge** (3rd Tier HSMA) | **4,393** | **2,801** | **1,592** | **1,550** | **1,116** | **434** | **212** | **197** | **15** |
| **Motherwell** (3rd Tier HSMA) | **9,179** | **6,438** | **2,741** | **2,924** | **2,175** | **749** | **280** | **240** | **40** |
| **Clydesdale** (3rd Tier HSMA) | **4,907** | **1,919** | **2,988** | **712** | **240** | **472** | **39** | **15** | **24** |
| **Hamilton** (3rd Tier HSMA) | **7,172** | **2,197** | **4,975** | **1,911** | **1,175** | **736** | **170** | **121** | **49** |
| | | | | | | | | | |
| **Discrete HMAs** | | | | | | | | | |
| Dumbarton and Vale of Leven (Discrete HMA) | 2,351 | 2,161 | 190 | 1,146 | 1,031 | 115 | 137 | 137 | 0 |
| Inverclyde (Discrete HMA) | 3,280 | 2,343 | 937 | 987 | 618 | 369 | 93 | 53 | 40 |

| TABLE 5 2013 PRIVATE SECTOR DISPUTED SITES WITH HOMES FOR SCOTLAND | | | |
|---|---|---|---|
| **As at 31 March 2013** | | | |
| **UNITARY COUNCILS** | **Effective Land Supply** | **Units Disputed** | **% of Effective Land Supply Disputed** |
| East Dunbartonshire | 1,534 | 35 | 2.3% |
| East Renfrewshire | 2,069 | 38 | 1.8% |
| City of Glasgow | 11,365 | 737 | 6.5% |
| Inverclyde | 1,021 | 92 | 9.0% |
| North Lanarkshire | 7,334 | 825 | 11.2% |
| Renfrewshire | 4,256 | 578 | 13.6% |
| South Lanarkshire | 5,382 | 32 | 0.6% |
| West Dunbartonshire | 1,760 | 526 | 29.9% |
| **GCVSDPA TOTAL** | **34,721** | **2,863** | **8.2%** |

- There are also disputed sites which are not Owner Occupied or Private Rental and therefore not traditionally disputed. These have not been recorded in this table

## PART B - Affordable Sector Housing Land Supply – 2013

| **TABLE 6A: AFFORDABLE SECTOR - ESTABLISHED LAND SUPPLY TOTAL 2013** | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 481 | 305 | 63% | 176 | 37% |
| East Renfrewshire | 235 | 144 | 61% | 91 | 39% |
| City of Glasgow | 8,959 | 7,898 | 88% | 1,061 | 12% |
| Inverclyde | 1,654 | 1,272 | 77% | 382 | 23% |
| North Lanarkshire | 2,297 | 882 | 38% | 1,415 | 62% |
| Renfrewshire | 385 | 256 | 66% | 129 | 34% |
| South Lanarkshire | 1,214 | 269 | 22% | 945 | 78% |
| West Dunbartonshire | 1,230 | 1,171 | 95% | 59 | 5% |
| **COUNCIL TOTAL** | **16,455** | **12,197** | 74% | **4,258** | 26% |

| **TABLE 6B: AFFORDABLE SECTOR - EFFECTIVE LAND SUPPLY TOTAL 2013** | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 411 | 247 | 60% | 164 | 40% |
| East Renfrewshire | 235 | 144 | 61% | 91 | 39% |
| City of Glasgow | 6,609 | 5,921 | 90% | 688 | 10% |
| Inverclyde | 796 | 631 | 79% | 165 | 21% |
| North Lanarkshire | 1,393 | 778 | 56% | 615 | 44% |
| Renfrewshire | 305 | 256 | 84% | 49 | 16% |
| South Lanarkshire | 494 | 219 | 44% | 275 | 56% |
| West Dunbartonshire | 901 | 892 | 99% | 9 | 1% |
| **COUNCIL TOTAL** | **11,144** | **9,088** | 82% | **2,056** | 18% |

| **TABLE 6C: AFFORDABLE SECTOR - COMPLETIONS TOTAL 2013** | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 176 | 99 | 56% | 77 | 44% |
| East Renfrewshire | 86 | 16 | 19% | 70 | 81% |
| City of Glasgow | 595 | 591 | 99% | 4 | 1% |
| Inverclyde | 114 | 100 | 88% | 14 | 12% |
| North Lanarkshire | 194 | 180 | 93% | 14 | 7% |
| Renfrewshire | 173 | 81 | 47% | 92 | 53% |
| South Lanarkshire | 150 | 134 | 89% | 16 | 11% |
| West Dunbartonshire | 51 | 51 | 100% | 0 | 0% |
| **COUNCIL TOTAL** | **1,539** | **1,252** | 81% | **287** | 19% |

Affordable Sector = Social Rent (Tables 7) + Intermediate (Tables 8) i.e. not OO or PR

| TABLE 7A: SOCIAL HOUSING SECTOR - ESTABLISHED LAND SUPPLY TOTAL 2013 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 471 | 295 | 63% | 176 | 37% |
| East Renfrewshire | 185 | 144 | 78% | 41 | 22% |
| City of Glasgow | 7,680 | 6,827 | 89% | 853 | 11% |
| Inverclyde | 903 | 699 | 77% | 204 | 23% |
| North Lanarkshire | 2,203 | 800 | 36% | 1,403 | 64% |
| Renfrewshire | 385 | 256 | 66% | 129 | 34% |
| South Lanarkshire | 1,214 | 269 | 22% | 945 | 78% |
| West Dunbartonshire | 1,155 | 1,096 | 95% | 59 | 5% |
| **COUNCIL TOTAL** | **14,196** | **10,386** | 73% | **3,810** | 27% |

| TABLE 7B: SOCIAL HOUSING SECTOR - EFFECTIVE LAND SUPPLY TOTAL 2013 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 401 | 237 | 59% | 164 | 41% |
| East Renfrewshire | 185 | 144 | 78% | 41 | 22% |
| City of Glasgow | 5,816 | 5,221 | 90% | 595 | 10% |
| Inverclyde | 577 | 453 | 79% | 124 | 21% |
| North Lanarkshire | 1,299 | 696 | 54% | 603 | 46% |
| Renfrewshire | 305 | 256 | 84% | 49 | 16% |
| South Lanarkshire | 494 | 219 | 44% | 275 | 56% |
| West Dunbartonshire | 826 | 817 | 99% | 9 | 1% |
| **COUNCIL TOTAL** | **9,903** | **8,043** | 81% | **1,860** | 19% |

| TABLE 7C: SOCIAL HOUSING SECTOR - COMPLETIONS TOTAL 2013 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 176 | 99 | 56% | 77 | 44% |
| East Renfrewshire | 63 | 16 | 25% | 47 | 75% |
| City of Glasgow | 473 | 469 | 99% | 4 | 1% |
| Inverclyde | 112 | 98 | 87.5% | 14 | 12.5% |
| North Lanarkshire | 194 | 180 | 93% | 14 | 7% |
| Renfrewshire | 173 | 81 | 47% | 92 | 53% |
| South Lanarkshire | 150 | 134 | 89% | 16 | 11% |
| West Dunbartonshire | 51 | 51 | 100% | 0 | 0% |
| **COUNCIL TOTAL** | **1,392** | **1,128** | 81% | **264** | 19% |

Social Housing Sector (Social Rent) = Local Authority and Registered Social Landlord and Mid-Market Rent (Social)

| TABLE 8A: INTERMEDIATE TENURE SECTOR - ESTABLISHED LAND SUPPLY TOTAL 2013 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 10 | 10 | 100% | 0 | 0% |
| East Renfrewshire | 50 | 0 | 0% | 50 | 100% |
| City of Glasgow | 1,279 | 1,071 | 84% | 208 | 16% |
| Inverclyde | 751 | 573 | 76% | 178 | 24% |
| North Lanarkshire | 94 | 82 | 87% | 12 | 13% |
| Renfrewshire | 0 | 0 | 0% | 0 | 0% |
| South Lanarkshire | 0 | 0 | 0% | 0 | 0% |
| West Dunbartonshire | 75 | 75 | 100% | 0 | 0% |
| **COUNCIL TOTAL** | **2,259** | **1,811** | 80% | **448** | 20% |

| TABLE 8B: INTERMEDIATE TENURE SECTOR - EFFECTIVE LAND SUPPLY TOTAL 2013 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 10 | 10 | 100% | 0 | 0% |
| East Renfrewshire | 50 | 0 | 0% | 50 | 100% |
| City of Glasgow | 793 | 700 | 88% | 93 | 12% |
| Inverclyde | 219 | 178 | 81% | 41 | 19% |
| North Lanarkshire | 94 | 82 | 87% | 12 | 13% |
| Renfrewshire | 0 | 0 | 0% | 0 | 0% |
| South Lanarkshire | 0 | 0 | 0% | 0 | 0% |
| West Dunbartonshire | 75 | 75 | 100% | 0 | 0% |
| **COUNCIL TOTAL** | **1,241** | **1,045** | 84% | **196** | 16% |

| TABLE 8C: INTERMEDIATE TENURE SECTOR - COMPLETIONS TOTAL 2013 | | | | | |
|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | |
| | | | | | |
| | **Total** | **Brownfield** | | **Greenfield** | |
| **UNITARY COUNCILS** | | | | | |
| East Dunbartonshire | 0 | 0 | 0% | 0 | 0% |
| East Renfrewshire | 23 | 0 | 0% | 23 | 100% |
| City of Glasgow | 122 | 122 | 100% | 0 | 0% |
| Inverclyde | 2 | 2 | 100% | 0 | 0% |
| North Lanarkshire | 0 | 0 | 0% | 0 | 0% |
| Renfrewshire | 0 | 0 | 0% | 0 | 0% |
| South Lanarkshire | 0 | 0 | 0% | 0 | 0% |
| West Dunbartonshire | 0 | 0 | 0% | 0 | 0% |
| **COUNCIL TOTAL** | **147** | **124** | 84% | **23** | 16% |

Intermediate Tenure Sector = Shared Equity, Mid-Market Rent (private) and Unsubsidised Low Cost Housing

## PART C – All Tenure Housing Land Supply - 2013

| TABLE 9: All TENURE - ESTABLISHED LAND SUPPLY 2013 | | | | | | | |
|---|---|---|---|---|---|---|---|
| As at 31 March 2013 | | | | | | | |
| GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | | | | | | | |
| | Total | Private | | Affordable | | Tenure Not Specified | |
| UNITARY COUNCILS | | | | | | | |
| East Dunbartonshire | 3,023 | 2,542 | 84% | 481 | 16% | 0 | 0% |
| East Renfrewshire | 5,219 | 4,984 | 95% | 235 | 5% | 0 | 0% |
| City of Glasgow | 44,242 | 35,283 | 80% | 8,959 | 20% | 0 | 0% |
| Inverclyde | 5,005 | 3,351 | 67% | 1,654 | 33% | 0 | 0% |
| North Lanarkshire | 21,791 | 19,494 | 89% | 2,297 | 11% | 0 | 0% |
| Renfrewshire | 10,508 | 10,123 | 96% | 385 | 4% | 0 | 0% |
| South Lanarkshire | 22,205 | 20,991 | 95% | 1,214 | 5% | 0 | 0% |
| West Dunbartonshire | 5,815 | 4,585 | 79% | 1,230 | 21% | 0 | 0% |
| **COUNCIL TOTAL** | **117,808** | **101,353** | **86%** | **16,455** | **14%** | **0** | **0%** |

| TABLE 10: ALL TENURE - EFFECTIVE LAND SUPPLY 2013/20 | | | | | | | |
|---|---|---|---|---|---|---|---|
| As at 31 March 2013 | | | | | | | |
| GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | | | | | | | |
| | Total | Private | | Affordable | | Tenure Not Specified | |
| UNITARY COUNCILS | | | | | | | |
| East Dunbartonshire | 1,945 | 1,534 | 79% | 411 | 21% | 0 | 0% |
| East Renfrewshire | 2,304 | 2,069 | 90% | 235 | 10% | 0 | 0% |
| City of Glasgow | 17,974 | 11,365 | 63% | 6,609 | 37% | 0 | 0% |
| Inverclyde | 1,817 | 1,021 | 56% | 796 | 44% | 0 | 0% |
| North Lanarkshire | 8,727 | 7,334 | 84% | 1,393 | 16% | 0 | 0% |
| Renfrewshire | 4,561 | 4,256 | 93% | 305 | 7% | 0 | 0% |
| South Lanarkshire | 5,876 | 5,382 | 92% | 494 | 8% | 0 | 0% |
| West Dunbartonshire | 2,661 | 1,760 | 66% | 901 | 34% | 0 | 0% |
| **COUNCIL TOTAL** | **45,865** | **34,721** | **76%** | **11,144** | **24%** | **0** | **0%** |

| TABLE 11: ALL TENURE - COMPLETIONS 2012/13 | | | | | | | |
|---|---|---|---|---|---|---|---|
| As at 31 March 2013 | | | | | | | |
| GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | | | | | | | |
| | Total | Private | | Affordable | | Tenure Not Specified | |
| UNITARY COUNCILS | | | | | | | |
| East Dunbartonshire | 417 | 241 | 58% | 176 | 42% | 0 | 0% |
| East Renfrewshire | 254 | 168 | 66% | 86 | 34% | 0 | 0% |
| City of Glasgow | 1,397 | 802 | 57% | 595 | 43% | 0 | 0% |
| Inverclyde | 209 | 95 | 45% | 114 | 55% | 0 | 0% |
| North Lanarkshire | 823 | 629 | 76% | 194 | 24% | 0 | 0% |
| Renfrewshire | 424 | 251 | 59% | 173 | 41% | 0 | 0% |
| South Lanarkshire | 788 | 638 | 81% | 150 | 19% | 0 | 0% |
| West Dunbartonshire | 194 | 143 | 74% | 51 | 26% | 0 | 0% |
| **COUNCIL TOTAL** | **4,506** | **2,967** | **66%** | **1,539** | **34%** | **0** | **0%** |

All Tenure = Private + Affordable + Tenure Not Specified (TNS) - (i.e. everything)
Private = OO + PR, Affordable = LA + RSL + MMRS + MMRP + SE + ULCHO, Tenure Not Specified = TNS
Note this year all records had a tenure identified for them

**PART D - HISTORIC TIME SERIES**

| TABLE 12: PRIVATE SECTOR: ESTABLISHED LAND SUPPLY - TOTAL | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | | | | | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | | | | | | | | | |
| | **2001** | **2002** | **2003** | **2004** | **2005** | **2006** | **2007** | **2008** | **2009** | **2010** | **2011** | **2012** | **2013** |
| **HOUSING MARKET AREAS** | | | | | | | | | | | | | |
| 1st Tier Housing Market Area | | | | | | | | | | | | | |
| Conurbation | 62,068 | 63,502 | 64,925 | 67,899 | 71,184 | 90,008 | 90,911 | 95,137 | 102,206 | 94,843 | 91,957 | 89,618 | 95,722 |
| | | | | | | | | | | | | | |
| **2nd Tier Housing Market Area** | | | | | | | | | | | | | |
| Central Conurbation HMA | 44,824 | 46,129 | 48,203 | 51,534 | 55,541 | 64,711 | 66,774 | 70,211 | 74,965 | 68,165 | 65,780 | 64,538 | 70,071 |
| Eastern Conurbation HMA | 17,244 | 17,373 | 16,722 | 16,365 | 15,643 | 25,297 | 24,137 | 24,926 | 27,241 | 26,678 | 26,177 | 25,080 | 25,651 |
| **2nd Tier Total** | **62,068** | **63,502** | **64,925** | **67,899** | **71,184** | **90,008** | **90,911** | **95,137** | **102,206** | **94,843** | **91,957** | **89,618** | **95,722** |
| | | | | | | | | | | | | | |
| **Discrete (self-contained HMAs)** | | | | | | | | | | | | | |
| Dumbarton and Vale of Leven HMA | 1,677 | 1,547 | 2,107 | 1,983 | 2,428 | 2,213 | 2,508 | 2,471 | 2,315 | 2,402 | 2,542 | 2,368 | 2,351 |
| Inverclyde HMA | 2,255 | 4,281 | 4,182 | 3,995 | 3,534 | 3,944 | 3,776 | 3,780 | 3,652 | 3,278 | 3,320 | 3,342 | 3,280 |
| **GCVSDP HMA Total** | **66,000** | **69,330** | **71,214** | **73,877** | **77,146** | **96,165** | **97,195** | **101,388** | **108,173** | **100,523** | **97,819** | **95,328** | **101,353** |
| | | | | | | | | | | | | | |
| **UNITARY COUNCILS** | | | | | | | | | | | | | |
| East Dunbartonshire | 1,860 | 1,901 | 2,705 | 2,718 | 2,901 | 3,157 | 3,150 | 3,343 | 3,155 | 2,992 | 2,851 | 2,818 | 2,542 |
| East Renfrewshire | 1,798 | 1,459 | 1,463 | 1,534 | 1,500 | 1,545 | 1,491 | 2,748 | 2,640 | 2,544 | 2,449 | 2,378 | 4,984 |
| City of Glasgow | 28,504 | 29,422 | 30,087 | 32,065 | 36,177 | 39,617 | 41,299 | 42,767 | 41,522 | 37,787 | 36,114 | 35,661 | 35,283 |
| Inverclyde | 2,448 | 4,433 | 4,330 | 4,110 | 3,627 | 4,018 | 3,849 | 3,857 | 3,752 | 3,382 | 3,443 | 3,456 | 3,351 |
| North Lanarkshire | 14,616 | 14,579 | 15,288 | 14,195 | 13,529 | 15,691 | 14,708 | 15,354 | 21,966 | 21,078 | 20,390 | 20,042 | 19,494 |
| Renfrewshire | 4,076 | 4,953 | 5,057 | 5,144 | 4,775 | 5,114 | 6,056 | 6,056 | 8,719 | 8,003 | 7,804 | 7,235 | 10,123 |
| South Lanarkshire | 10,168 | 10,112 | 8,677 | 9,730 | 9,842 | 22,270 | 21,599 | 21,840 | 21,626 | 20,061 | 19,851 | 19,067 | 20,991 |
| West Dunbartonshire | 2,530 | 2,471 | 3,607 | 4,381 | 4,795 | 4,753 | 5,043 | 5,423 | 4,793 | 4,676 | 4,917 | 4,671 | 4,585 |
| **COUNCIL TOTAL** | **66,000** | **69,330** | **71,214** | **73,877** | **77,146** | **96,165** | **97,195** | **101,388** | **108,173** | **100,523** | **97,819** | **95,328** | **101,353** |

| TABLE 13: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY - TOTAL | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| As at 31 March 2013 | | | | | | | | | | | | | |
| GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | | | | | | | | | | | | | |
| | 2001-08 | 2002-09 | 2003-10 | 2004-11 | 2005-12 | 2006-13 | 2007-14 | 2008-15 | 2009-16 | 2010-17 | 2011-18 | 2012-19 | 2013-20 |
| **HOUSING MARKET AREAS** | | | | | | | | | | | | | |
| **1st Tier Housing Market Area** | | | | | | | | | | | | | |
| **Conurbation** | 39,089 | 38,582 | 40,101 | 44,794 | 48,790 | 56,916 | 57,947 | 48,593 | 37,504 | 34,632 | 32,412 | 30,720 | 32,588 |
| | | | | | | | | | | | | | |
| **2nd Tier Housing Market Area** | | | | | | | | | | | | | |
| Central Conurbation HMA | 29,012 | 28,962 | 31,220 | 35,126 | 39,434 | 42,306 | 43,146 | 35,455 | 27,523 | 26,257 | 24,348 | 23,939 | 25,491 |
| Eastern Conurbation HMA | 10,077 | 9,620 | 8,881 | 9,668 | 9,356 | 14,610 | 14,801 | 13,138 | 9,981 | 8,375 | 8,064 | 6,781 | 7,097 |
| **2nd Tier Total** | **39,089** | **38,582** | **40,101** | **44,794** | **48,790** | **56,916** | **57,947** | **48,593** | **37,504** | **34,632** | **32,412** | **30,720** | **32,588** |
| | | | | | | | | | | | | | |
| **Discrete (self-contained HMAs)** | | | | | | | | | | | | | |
| Dumbarton and Vale of Leven HMA | 1,265 | 1,310 | 1,730 | 1,791 | 2,030 | 2,168 | 2,264 | 1,835 | 1,750 | 1,595 | 1,246 | 1,207 | 1,146 |
| Inverclyde HMA | 1,270 | 1,464 | 1,319 | 1,472 | 1,699 | 1,867 | 1,970 | 1,864 | 1,700 | 1,150 | 1,082 | 1,055 | 987 |
| **GCVSDP HMA Total** | **41,624** | **41,356** | **43,150** | **48,057** | **52,519** | **60,951** | **62,181** | **52,292** | **40,954** | **37,377** | **34,740** | **32,982** | **34,721** |
| | | | | | | | | | | | | | |
| **UNITARY COUNCILS** | | | | | | | | | | | | | |
| East Dunbartonshire | 353 | 454 | 1,130 | 1,013 | 1,132 | 1,738 | 1,768 | 1,621 | 1,457 | 1,569 | 1,721 | 1,564 | 1,534 |
| East Renfrewshire | 1,623 | 1,357 | 1,376 | 1,523 | 1,500 | 1,545 | 1,491 | 1,763 | 1,431 | 1,337 | 1,204 | 1,108 | 2,069 |
| City of Glasgow | 16,537 | 16,505 | 18,162 | 21,284 | 24,670 | 24,706 | 24,960 | 18,060 | 13,665 | 13,807 | 12,971 | 13,338 | 11,365 |
| Inverclyde | 1,405 | 1,554 | 1,394 | 1,526 | 1,748 | 1,899 | 2,041 | 1,937 | 1,779 | 1,229 | 1,172 | 1,133 | 1,021 |
| North Lanarkshire | 8,412 | 6,628 | 7,204 | 7,280 | 7,242 | 9,426 | 8,740 | 6,722 | 6,379 | 6,122 | 6,696 | 7,045 | 7,334 |
| Renfrewshire | 3,096 | 3,923 | 3,949 | 4,060 | 4,212 | 4,478 | 5,321 | 4,896 | 3,684 | 3,712 | 2,883 | 2,296 | 4,256 |
| South Lanarkshire | 8,110 | 8,721 | 7,257 | 8,134 | 8,564 | 13,328 | 14,075 | 14,092 | 10,019 | 7,378 | 6,268 | 4,723 | 5,382 |
| West Dunbartonshire | 2,088 | 2,214 | 2,678 | 3,237 | 3,451 | 3,831 | 3,785 | 3,201 | 2,540 | 2,223 | 1,825 | 1,775 | 1,760 |
| **COUNCIL TOTAL** | **41,624** | **41,356** | **43,150** | **48,057** | **52,519** | **60,951** | **62,181** | **52,292** | **40,954** | **37,377** | **34,740** | **32,982** | **34,721** |
| | | | | | | | | | | | | | |
| **% of Established Land Supply** | **63%** | **60%** | **61%** | **65%** | **68%** | **63%** | **64%** | **52%** | **38%** | **37%** | **36%** | **35%** | **34%** |

| TABLE 14: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY - BROWNFIELD | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| As at 31 March 2013 | | | | | | | | | | | | | |
| GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | | | | | | | | | | | | | |
| | 2001-08 | 2002-09 | 2003-10 | 2004-11 | 2005-12 | 2006-13 | 2007-14 | 2008-15 | 2009-16 | 2010-17 | 2011-18 | 2012-19 | 2013-20 |
| **HOUSING MARKET AREAS** | | | | | | | | | | | | | |
| **1st Tier Housing Market Area** | | | | | | | | | | | | | |
| Conurbation | 25,015 | 25,767 | 27,863 | 32,564 | 35,874 | 40,513 | 41,990 | 32,510 | 25,918 | 23,767 | 22,130 | 20,726 | 20,131 |
| | | | | | | | | | | | | | |
| **2nd Tier Housing Market Area** | | | | | | | | | | | | | |
| Central Conurbation HMA | 19,169 | 20,850 | 23,203 | 26,898 | 29,927 | 31,602 | 32,960 | 24,910 | 19,268 | 18,339 | 16,706 | 15,954 | 15,425 |
| Eastern Conurbation HMA | 5,846 | 4,917 | 4,660 | 5,666 | 5,947 | 8,911 | 9,030 | 7,600 | 6,650 | 5,428 | 5,424 | 4,772 | 4,706 |
| **2nd Tier Total** | **25,015** | **25,767** | **27,863** | **32,564** | **35,874** | **40,513** | **41,990** | **32,510** | **25,918** | **23,767** | **22,130** | **20,726** | **20,131** |
| | | | | | | | | | | | | | |
| **Discrete (self-contained HMAs)** | | | | | | | | | | | | | |
| Dumbarton and Vale of Leven HMA | 481 | 644 | 1,239 | 1,482 | 1,835 | 1,891 | 2,190 | 1,735 | 1,635 | 1,548 | 1,200 | 1,164 | 1,031 |
| Inverclyde HMA | 489 | 764 | 754 | 819 | 954 | 1,292 | 1,439 | 1,334 | 1,189 | 800 | 779 | 741 | 618 |
| **GCVSDP HMA Total** | **25,985** | **27,175** | **29,856** | **34,865** | **38,663** | **43,696** | **45,619** | **35,579** | **28,742** | **26,115** | **24,109** | **22,631** | **21,780** |
| | | | | | | | | | | | | | |
| **UNITARY COUNCILS** | | | | | | | | | | | | | |
| East Dunbartonshire | 141 | 246 | 828 | 772 | 774 | 1,261 | 1,241 | 1,052 | 943 | 1,036 | 1,065 | 803 | 674 |
| East Renfrewshire | 371 | 113 | 149 | 382 | 339 | 353 | 370 | 572 | 462 | 470 | 416 | 449 | 626 |
| City of Glasgow | 13,085 | 13,373 | 15,093 | 17,715 | 20,475 | 20,761 | 21,207 | 14,396 | 11,084 | 10,875 | 9,978 | 10,323 | 8,935 |
| Inverclyde | 616 | 846 | 818 | 846 | 974 | 1,307 | 1,502 | 1,397 | 1,261 | 870 | 860 | 813 | 648 |
| North Lanarkshire | 5,545 | 3,940 | 3,916 | 4,392 | 4,279 | 6,119 | 6,018 | 4,951 | 4,490 | 4,062 | 4,247 | 4,166 | 4,105 |
| Renfrewshire | 2,547 | 3,342 | 3,504 | 3,619 | 3,836 | 4,219 | 4,835 | 4,370 | 3,234 | 3,302 | 2,595 | 1,999 | 3,117 |
| South Lanarkshire | 2,659 | 4,038 | 3,465 | 4,355 | 4,770 | 6,182 | 6,790 | 5,788 | 4,852 | 3,324 | 3,169 | 2,346 | 2,030 |
| West Dunbartonshire | 1,021 | 1,277 | 2,083 | 2,784 | 3,216 | 3,494 | 3,656 | 3,053 | 2,416 | 2,176 | 1,779 | 1,732 | 1,645 |
| **COUNCIL TOTAL** | **25,985** | **27,175** | **29,856** | **34,865** | **38,663** | **43,696** | **45,619** | **35,579** | **28,742** | **26,115** | **24,109** | **22,631** | **21,780** |
| | | | | | | | | | | | | | |
| **% of Effective Land Supply** | **62%** | **66%** | **69%** | **73%** | **74%** | **72%** | **73%** | **68%** | **70%** | **70%** | **69%** | **69%** | **63%** |

| TABLE 15: PRIVATE SECTOR: EFFECTIVE LAND SUPPLY - GREENFIELD | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| As at 31 March 2013 | | | | | | | | | | | | | |
| GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | | | | | | | | | | | | | |
| | 2001-08 | 2002-09 | 2003-10 | 2004-11 | 2005-12 | 2006-13 | 2007-14 | 2008-15 | 2009-16 | 2010-17 | 2011-18 | 2012-19 | 2013-20 |
| **HOUSING MARKET AREAS** | | | | | | | | | | | | | |
| **1st Tier Housing Market Area** | | | | | | | | | | | | | |
| Conurbation | 14,074 | 12,815 | 12,238 | 12,230 | 12,916 | 16,403 | 15,957 | 16,083 | 11,586 | 10,865 | 10,282 | 9,994 | 12,457 |
| | | | | | | | | | | | | | |
| **2nd Tier Housing Market Area** | | | | | | | | | | | | | |
| Central Conurbation HMA | 9,843 | 8,112 | 8,017 | 8,228 | 9,507 | 10,704 | 10,186 | 10,545 | 8,255 | 7,918 | 7,642 | 7,985 | 10,066 |
| Eastern Conurbation HMA | 4,231 | 4,703 | 4,221 | 4,002 | 3,409 | 5,699 | 5,771 | 5,538 | 3,331 | 2,947 | 2,640 | 2,009 | 2,391 |
| **2nd Tier Total** | **14,074** | **12,815** | **12,238** | **12,230** | **12,916** | **16,403** | **15,957** | **16,083** | **11,586** | **10,865** | **10,282** | **9,994** | **12,457** |
| | | | | | | | | | | | | | |
| **Discrete (self-contained HMAs)** | | | | | | | | | | | | | |
| Dumbarton and Vale of Leven HMA | 784 | 666 | 491 | 309 | 195 | 277 | 74 | 100 | 115 | 47 | 46 | 43 | 115 |
| Inverclyde HMA | 781 | 700 | 565 | 653 | 745 | 575 | 531 | 530 | 511 | 350 | 303 | 314 | 369 |
| **GCVSDP HMA Total** | **15,639** | **14,181** | **13,294** | **13,192** | **13,856** | **17,255** | **16,562** | **16,713** | **12,212** | **11,262** | **10,631** | **10,351** | **12,941** |
| | | | | | | | | | | | | | |
| **UNITARY COUNCILS** | | | | | | | | | | | | | |
| East Dunbartonshire | 212 | 208 | 302 | 241 | 358 | 477 | 527 | 569 | 514 | 533 | 656 | 761 | 860 |
| East Renfrewshire | 1,252 | 1,244 | 1,227 | 1,141 | 1,161 | 1,192 | 1,121 | 1,191 | 969 | 867 | 788 | 659 | 1,443 |
| City of Glasgow | 3,452 | 3,132 | 3,069 | 3,569 | 4,195 | 3,945 | 3,753 | 3,664 | 2,581 | 2,932 | 2,993 | 3,015 | 2,430 |
| Inverclyde | 789 | 708 | 576 | 680 | 774 | 592 | 539 | 540 | 518 | 359 | 312 | 320 | 373 |
| North Lanarkshire | 2,867 | 2,688 | 3,288 | 2,888 | 2,963 | 3,307 | 2,722 | 1,771 | 1,889 | 2,060 | 2,449 | 2,879 | 3,229 |
| Renfrewshire | 549 | 581 | 445 | 441 | 376 | 259 | 486 | 526 | 450 | 410 | 288 | 297 | 1,139 |
| South Lanarkshire | 5,451 | 4,683 | 3,792 | 3,779 | 3,794 | 7,146 | 7,285 | 8,304 | 5,167 | 4,054 | 3,099 | 2,377 | 3,352 |
| West Dunbartonshire | 1,067 | 937 | 595 | 453 | 235 | 337 | 129 | 148 | 124 | 47 | 46 | 43 | 115 |
| **COUNCIL TOTAL** | **15,639** | **14,181** | **13,294** | **13,192** | **13,856** | **17,255** | **16,562** | **16,713** | **12,212** | **11,262** | **10,631** | **10,351** | **12,941** |
| | | | | | | | | | | | | | |
| **% of Effective Land Supply** | **38%** | **34%** | **31%** | **27%** | **26%** | **28%** | **27%** | **32%** | **30%** | **30%** | **31%** | **31%** | **37%** |

| TABLE 16: PRIVATE SECTOR: COMPLETIONS - TOTAL | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| As at 31 March 2013 | | | | | | | | | | | | |
| GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN | | | | | | | | | | | | |
| | 2001/02 | 2002/03 | 2003/04 | 2004/05 | 2005/06 | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 | 2012/13 |
| **HOUSING MARKET AREAS** | | | | | | | | | | | | |
| **1st Tier Housing Market Area** | | | | | | | | | | | | |
| Conurbation | 5,726 | 5,970 | 5,756 | 5,745 | 6,436 | 7,170 | 7,505 | 5,170 | 3,386 | 2,633 | 2,791 | 2,737 |
| | | | | | | | | | | | | |
| **2nd Tier Housing Market Area** | | | | | | | | | | | | |
| Central Conurbation HMA | 4,156 | 4,238 | 3,915 | 3,689 | 4,322 | 5,192 | 5,361 | 3,614 | 2,489 | 2,072 | 2,039 | 2,036 |
| Eastern Conurbation HMA | 1,570 | 1,732 | 1,841 | 2,056 | 2,114 | 1,978 | 2,144 | 1,556 | 897 | 561 | 752 | 701 |
| **2nd Tier Total** | **5,726** | **5,970** | **5,756** | **5,745** | **6,436** | **7,170** | **7,505** | **5,170** | **3,386** | **2,633** | **2,791** | **2,737** |
| | | | | | | | | | | | | |
| **Discrete (self-contained HMAs)** | | | | | | | | | | | | |
| Dumbarton and Vale of Leven HMA | 262 | 99 | 108 | 117 | 206 | 102 | 133 | 79 | 73 | 49 | 89 | 137 |
| Inverclyde HMA | 190 | 240 | 167 | 134 | 196 | 221 | 221 | 150 | 113 | 99 | 81 | 93 |
| **GCVSDP HMA Total** | **6,178** | **6,309** | **6,031** | **5,996** | **6,838** | **7,493** | **7,859** | **5,399** | **3,572** | **2,781** | **2,961** | **2,967** |
| | | | | | | | | | | | | |
| **UNITARY COUNCILS** | | | | | | | | | | | | |
| East Dunbartonshire | 45 | 68 | 143 | 271 | 95 | 98 | 221 | 148 | 29 | 96 | 154 | 241 |
| East Renfrewshire | 236 | 132 | 84 | 94 | 41 | 57 | 105 | 99 | 69 | 92 | 101 | 168 |
| City of Glasgow | 2,418 | 2,406 | 2,339 | 2,004 | 2,704 | 3,207 | 3,348 | 1,874 | 1,381 | 1,073 | 955 | 802 |
| Inverclyde | 240 | 263 | 193 | 160 | 223 | 237 | 221 | 150 | 115 | 109 | 90 | 95 |
| North Lanarkshire | 1,201 | 1,434 | 1,316 | 1,339 | 1,413 | 1,278 | 1,563 | 1,182 | 611 | 456 | 540 | 629 |
| Renfrewshire | 435 | 442 | 506 | 402 | 440 | 679 | 661 | 635 | 371 | 286 | 282 | 251 |
| South Lanarkshire | 1,250 | 1,331 | 1,253 | 1,551 | 1,690 | 1,823 | 1,548 | 1,134 | 861 | 576 | 739 | 638 |
| West Dunbartonshire | 353 | 233 | 197 | 175 | 232 | 114 | 192 | 177 | 135 | 93 | 100 | 143 |
| **COUNCIL TOTAL** | **6,178** | **6,309** | **6,031** | **5,996** | **6,838** | **7,493** | **7,859** | **5,399** | **3,572** | **2,781** | **2,961** | **2,967** |
| | | | | | | | | | | | | |
| **% Brownfield** | **67%** | **70%** | **72%** | **69%** | **73%** | **72%** | **71%** | **73%** | **74%** | **75%** | **72%** | **71%** |
| **% Greenfield** | **33%** | **30%** | **28%** | **31%** | **27%** | **28%** | **29%** | **27%** | **26%** | **25%** | **28%** | **29%** |

*2015 - change made to Inverclyde 2010/11 HMA figure from 100 to 99. Other figures adjusted accordingly.

| TABLE 17: PRIVATE SECTOR: COMPLETIONS - BROWNFIELD | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **As at 31 March 2012** | | | | | | | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | | | | | | | |
| | **2001/02** | **2002/03** | **2003/04** | **2004/05** | **2005/06** | **2006/07** | **2007/08** | **2008/09** | **2009/10** | **2010/11** | **2011/12** | **2012/13** |
| **HOUSING MARKET AREAS** | | | | | | | | | | | | |
| **1st Tier Housing Market Area** | | | | | | | | | | | | |
| Conurbation | 3,884 | 4,235 | 4,231 | 4,017 | 4,705 | 5,118 | 5,280 | 3,786 | 2,500 | 1,989 | 1,998 | 1,916 |
| | | | | | | | | | | | | |
| **2nd Tier Housing Market Area** | | | | | | | | | | | | |
| Central Conurbation HMA | 2,941 | 3,174 | 3,258 | 2,970 | 3,422 | 3,864 | 3,958 | 2,749 | 1,865 | 1,512 | 1,444 | 1,343 |
| Eastern Conurbation HMA | 943 | 1,061 | 973 | 1,047 | 1,283 | 1,254 | 1,322 | 1,037 | 635 | 477 | 554 | 573 |
| **2nd Tier Total** | **3,884** | **4,235** | **4,231** | **4,017** | **4,705** | **5,118** | **5,280** | **3,786** | **2,500** | **1,989** | **1,998** | **1,916** |
| | | | | | | | | | | | | |
| **Discrete (self-contained HMAs)** | | | | | | | | | | | | |
| Dumbarton and Vale of Leven HMA | 141 | 15 | 41 | 84 | 193 | 97 | 133 | 67 | 70 | 48 | 89 | 137 |
| Inverclyde HMA | 104 | 168 | 98 | 62 | 88 | 156 | 196 | 106 | 73 | 52 | 37 | 53 |
| **GCVSDP HMA Total** | **4,129** | **4,418** | **4,370** | **4,163** | **4,986** | **5,371** | **5,609** | **3,959** | **2,643** | **2,089** | **2,124** | **2,106** |
| | | | | | | | | | | | | |
| **UNITARY COUNCILS** | | | | | | | | | | | | |
| East Dunbartonshire | 35 | 46 | 82 | 159 | 67 | 98 | 200 | 131 | 24 | 78 | 117 | 166 |
| East Renfrewshire | 55 | 33 | 38 | 79 | 16 | 16 | 22 | 45 | 23 | 34 | 10 | 45 |
| City of Glasgow | 2,034 | 2,136 | 2,166 | 1,765 | 2,368 | 2,682 | 2,761 | 1,606 | 1,183 | 927 | 743 | 664 |
| Inverclyde | 154 | 188 | 118 | 75 | 105 | 163 | 196 | 106 | 74 | 62 | 43 | 55 |
| North Lanarkshire | 672 | 871 | 877 | 926 | 904 | 724 | 900 | 735 | 457 | 419 | 471 | 472 |
| Renfrewshire | 249 | 262 | 421 | 369 | 413 | 595 | 612 | 577 | 344 | 227 | 271 | 240 |
| South Lanarkshire | 709 | 751 | 538 | 648 | 894 | 984 | 733 | 618 | 415 | 250 | 369 | 321 |
| West Dunbartonshire | 221 | 131 | 130 | 142 | 219 | 109 | 185 | 141 | 123 | 92 | 100 | 143 |
| **COUNCIL TOTAL** | **4,129** | **4,418** | **4,370** | **4,163** | **4,986** | **5,371** | **5,609** | **3,959** | **2,643** | **2,089** | **2,124** | **2,106** |

*2015 - change made to Inverclyde 2007/08 HMA figure from 220 to 196 and Inverclyde HMA 2010/11 from 53 to 52. Other figures adjusted accordingly.

| TABLE 18: PRIVATE SECTOR: COMPLETIONS - GREENFIELD | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **As at 31 March 2013** | | | | | | | | | | | | |
| **GLASGOW AND THE CLYDE VALLEY STRATEGIC DEVELOPMENT PLAN** | | | | | | | | | | | | |
| | **2001/02** | **2002/03** | **2003/04** | **2004/05** | **2005/06** | **2006/07** | **2007/08** | **2008/09** | **2009/10** | **2010/11** | **2011/12** | **2012/13** |
| **HOUSING MARKET AREAS** | | | | | | | | | | | | |
| **1st Tier Housing Market Area** | | | | | | | | | | | | |
| Conurbation | 1,842 | 1,735 | 1,525 | 1,728 | 1,731 | 2,052 | 2,225 | 1,384 | 886 | 644 | 793 | 821 |
| | | | | | | | | | | | | |
| **2nd Tier Housing Market Area** | | | | | | | | | | | | |
| Central Conurbation HMA | 1,215 | 1,064 | 657 | 719 | 900 | 1,328 | 1,403 | 865 | 624 | 560 | 595 | 693 |
| Eastern Conurbation HMA | 627 | 671 | 868 | 1,009 | 831 | 724 | 822 | 519 | 262 | 84 | 198 | 128 |
| **2nd Tier Total** | **1,842** | **1,735** | **1,525** | **1,728** | **1,731** | **2,052** | **2,225** | **1,384** | **886** | **644** | **793** | **821** |
| | | | | | | | | | | | | |
| **Discrete (self-contained HMAs)** | | | | | | | | | | | | |
| Dumbarton and Vale of Leven HMA | 121 | 84 | 67 | 33 | 13 | 5 | 0 | 12 | 3 | 1 | 0 | 0 |
| Inverclyde HMA | 86 | 72 | 69 | 72 | 108 | 65 | 25 | 44 | 40 | 47 | 44 | 40 |
| **GCVSDP HMA Total** | **2,049** | **1,891** | **1,661** | **1,833** | **1,852** | **2,122** | **2,250** | **1,440** | **929** | **692** | **837** | **861** |
| | | | | | | | | | | | | |
| **UNITARY COUNCILS** | | | | | | | | | | | | |
| East Dunbartonshire | 10 | 22 | 61 | 112 | 28 | 0 | 21 | 17 | 5 | 18 | 37 | 75 |
| East Renfrewshire | 181 | 99 | 46 | 15 | 25 | 41 | 83 | 54 | 46 | 58 | 91 | 123 |
| City of Glasgow | 384 | 270 | 173 | 239 | 336 | 525 | 587 | 268 | 198 | 146 | 212 | 138 |
| Inverclyde | 86 | 75 | 75 | 85 | 118 | 74 | 25 | 44 | 41 | 47 | 47 | 40 |
| North Lanarkshire | 529 | 563 | 439 | 413 | 509 | 554 | 663 | 447 | 154 | 37 | 69 | 157 |
| Renfrewshire | 186 | 180 | 85 | 33 | 27 | 84 | 49 | 58 | 27 | 59 | 11 | 11 |
| South Lanarkshire | 541 | 580 | 715 | 903 | 796 | 839 | 815 | 516 | 446 | 326 | 370 | 317 |
| West Dunbartonshire | 132 | 102 | 67 | 33 | 13 | 5 | 7 | 36 | 12 | 1 | 0 | 0 |
| **COUNCIL TOTAL** | **2,049** | **1,891** | **1,661** | **1,833** | **1,852** | **2,122** | **2,250** | **1,440** | **929** | **692** | **837** | **861** |

**ANNEX 2 – Private Sector Housing Market Area Framework**

**Diagram 17 Housing Market Areas (Strategic Development Plan, May 2012)**

| **Housing Market Areas** | | | |
|---|---|---|---|
| 1st Tier HMA | 2nd Tier HMA | 3rd Tier Housing Sub-Market Areas | |
| **Conurbation** | Central Conurbation | **1** | Greater Glasgow North and West |
| | | **2** | Strathkelvin and Springburn |
| | | **3** | Glasgow East End |
| | | **4** | Cumbernauld |
| | | **5** | Greater Glasgow South |
| | | **6** | Renfrewshire |
| | | **7** | East Kilbride |
| | Eastern Conurbation | **8** | Airdrie and Coatbridge |
| | | **9** | Motherwell |
| | | **10** | Clydesdale |
| | | **11** | Hamilton |
| **Discrete (self-contained) Housing Market Areas** | | | |
| Dumbarton and Vale of Leven | | | |
| Inverclyde | | | |

**Annex 3 – Definitions used in monitoring report**

- ALL TENURE figures consist of private, intermediate, social and not specified tenures.

- PRIVATE TENURE figures consist of owner occupied and private rental only. Private shared equity and private mid-market rent are considered intermediate tenures for the purposes of the report.

- SOCIAL TENURE figures are relatively new to the monitoring report and consist of sites recorded as local authority, registered social landlord, or social mid-market rent.

- INTERMEDIATE TENURE figures are also new to the monitoring report and consist of sites recorded as shared equity, private mid-market rent and unsubsidised low cost housing.

- AFFORDABLE SECTOR is used as an aggregation of the housing tenures which are not included in the private housing figures. In simple terms, this consists of the social housing sector and the intermediate sector. Programming and auditing the supply of these tenures has historically been difficult. Strategic Housing Investment Programmes may provide more detailed affordable sector programming.

- ESTABLISHED LAND SUPPLY accounts for all units being promoted through the Plan. This is the overall figure and contains the effective and non-effective elements of the supply.

- EFFECTIVE LAND SUPPLY accounts for the units which are programmed to be completed within the next 7 years (by 2020).

- NON-EFFECTIVE SUPPLY is the element of the established supply which is not programmed to be complete within the next 7 years (i.e. it will not complete by 2020) but which is being promoted through the Plan for housing.

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