

Housing Land Audit 2025

Highland Council area programmed house completions 2025 to 2040

Highland Council Development Plans Team
24th June 2026



1 Introduction

- 1.1 The Housing Land Audit 2025 is an assessment of the housing land supply available in the Highland Council area as at 1st April 2025.
- 1.2 The audit identifies and provides a programme of expected housing delivery over what is identified as the Housing Pipeline. This is split into Years 1-3 (Short term), years 4-6 (Medium term) and Years 7-10 (Long Term delivery). Highland Council also identifies programmed delivery in years 11-15 (Very Long term) specifically for use in School Roll forecasting and infrastructure needs forecasting.
- 1.3 This audit provides information on the available housing land supply to meet the goal of delivering new homes up to the end of March 2040, using 1 April 2025 as the base date.
- 1.4 Sites included in the Audit are housing sites under construction, sites with planning consent, sites in the relevant adopted or finalised Local Development Plans and, as appropriate, other buildings and land with agreed potential for housing development.
- 1.5 All new housing development, redevelopment, conversions and subdivisions are included. In addition to sites allocated in the relevant Local Development Plans, there are a number of other sources of development that provide additional supply through windfall sites. Where such a site has planning permission on 1st April 2025 and will provide 4 or more housing units it is included in the audit.
- 1.6 The National Planning Framework (NPF4) requires that planning authorities should ensure that sufficient land is available to meet the area housing land requirement (see below).
- 1.7 New Housing Land Audit Guidance was published in January 2024. This new guidance proposed a similar approach to that we have followed for several years and was adopted for this 2025 audit.
- 1.8 The Housing Land Audit has multiple purposes:
 - To monitor the availability of effective sites;
 - To identify progress of sites through the planning process; and,
 - To provide analysis on house completions
- 1.9 As we move towards a more robust approach to supporting the delivery of development we have been keen to ensure that the planning of housing sites and the timing of infrastructure delivery is informed by more accurate and realistic forecasts and this engagement is welcomed.
- 1.10 The draft version of this audit was discussed and agreed with "Homes for Scotland" and their representatives in March 2026. Their view is that no programming should be included in the Housing Land Audit for years 1-10 if

detailed planning consent has not been gained. Highland Council however do include in the HLA programming figures for sites from year 4 onwards where a site has funding allocated in the SHIP or officer discussions have identified likely deliveries between years 4 and 15 to make the Housing Land Audit a practically useful document for infrastructure and service forward planning.

1.11 Details on sites and their programming schedules from 2025–26 to 2039–40 are available in multiple forms:

- Descriptively or interactively through [the Story Map](#) including an [interactive Housing Sites Map](#)
- Through this downloadable summary document **Housing Land Audit 2025_DOCUMENT.pdf**
- A prepared MS Excel spreadsheet the **HLA Sites Table** downloaded from [here](#) containing tabs showing ALL sites and separate tabs for those in the Development Pipeline, Completed Sites, Removed Sites , Very Long Development Pipeline (years 11-15) and other None Pipeline Sites.
- Data can be downloaded from the [Highland Council Open Map Data Portal](#) (**HLA2025 FINAL – Public View – Open Data**) as a CSV file or in various map data formats including the site polygons

1.12 The data in this Housing Land Audit 2025 aligns with the annual School Roll Forecasts and supports relevant Delivery Programmes.

1.13 The previous 2024 Housing Land Audit remains available for reference via the following links [Housing Land Audit 2024 StoryMap](#), the [2024 Interactive Map](#), download the [Summary Document](#), or the [Sites Table](#)

2 Main Findings

- 2.1 The housing land audit's main findings are that the existing planned developments provide an adequate supply of available housing land across the Highland area in each of the identified programming periods covering all of the different geographic areas of Highland.
- 2.2 **Housing Land Supply Pipeline**
- 2.3 **Short-term programmed delivery - Years 1-3** - Financial Years 2025/26, 2026/27 and 2027/28 - This period provides an indication of the immediately deliverable housing land supply in the Highland Council area. In this Short term pipeline there is a programmed supply of housing units on 103 sites across the Highland Council area containing 2782 units.
- 2.4 **Medium-term programmed delivery - Years 4-6** - Financial Years 2028/29, 2029/30 and 2030/31 contains a further 71 sites sites programmed to commence delivery in this period. In total (along with those first programmed in the Short term period above) there are 174 sites delivering 3663 homes in this period.
- 2.5 **Long-term programmed delivery - Years 7-10** - Financial Years 2031/32, 2032/33, 2033/34 and 2034/35 - this contains a further 21 sites sites programmed for initial delivery in this period. In total (along with those first programmed in the Short and Medium-term periods above) there are 195 sites programmed to deliver 2925 homes in this period. It should be noted that forecasting in this period can be very difficult as many planning permissions are not yet in place and funding for construction not yet agreed
- 2.6 **The 10 year supply (April 1st 2025 - 31st March 2035)** contains programming of 9370 housing units of which 8115 (87%) are on housing allocations from the relevant Local Development Plan with the remaining 1255 (13%) on the larger windfall (4 or more units) housing sites.
- 2.7 This 10 year programming is widely spread across the Highland Council Housing Market Areas (HMAs) with a continuing significant number of programmed builds in the Inverness HMA (55% of the 10 year supply) and Mid/East Ross HMAs (23%) - but with lower forecasts for Nairn HMA (3%).
- 2.8 In Ross and Cromarty West HMA, Caithness, Sutherland and Skye and Lochalsh HMAs low programming figures are included however, in these Housing Market areas small windfall development, on sites of 1 to 3 residential units has historically delivered a much higher proportion of completions.
- 2.9 Housing allocations with significant numbers of programmed completions in the **Short-term pipeline** are in the Inverness HMA at:
- Tornagrain (227)
 - Delnies (155)

- Ness-Side (139 units)
- Balloch Farm (99)
- Druid Temple (123)
- Stratton (78)
- and at Earls Gate (83)

2.10 Further larger sites outside Inverness anticipating 40 or more housing completions in this 3 year period are located in:

- Aviemore
- Newtonmore
- Dornoch
- Drumnadrochit
- and Conon Bridge.

2.11 In the Medium-term pipeline period additional larger programming numbers can be seen across the Highland Council area in the following locations:

- Fort William (190 on 4 sites)
- Portree (148 on 3 sites)
- Evanton (160 on 4 sites)
- Muir Of Ord (108 across 2 sites)
- Tain (234 on 4 sites)
- Alness (204 on 4 sites)
- Ullapool (90)
- North Kessock (60)

2.12 **Large Windfall Sites** - 13% of the 10 year programmed delivery expected from larger windfall sites (site of 4 or more approved units)

2.13 **Smaller windfall developments** on site of less than 4 units **is not included in this audit or these figures**. This type of development has historically contributed to the total housing supply and has more of an impact in some housing market areas.

2.14 Over the last 5 financial years **Caithness HMA has seen between 44% and 85% of completions delivered on small windfall sites** with 30-70% in each year in Sutherland HMA and 48-70% in Skye and Lochalsh. **Ross and Cromarty West has seen 89-100% of completions in the last 3 complete financial years delivered on small windfall sites.**

2.15 Across the complete Highland Council area **between 17.7% and 24.4%** of completions were on small windfall sites of 1 to 3 residential units in this period

2.16 In the Financial Year from 1st April 2024 to 31st March 2025 - **742 house completions** were reported on sites in this Housing Land Audit (larger windfall and allocated sites). The same single year period delivered a total of 1000 units - the remaining 258 on small windfall sites.

2.17 Detailed House Completions Data

HMA Area	Total Completions by Financial Year				
	2020/2021	2021/2022	2022/2023	2023/2024	2024/2025
Badenoch and Strathspey	66	28	144	100	103
Caithness	34	41	42	28	26
East Ross	40	116	72	63	69
Inverness	403	857	652	412	415
Lochaber	43	100	160	104	140
Mid Ross	48	151	106	89	62
Nairn	86	29	27	33	11
Ross and Cromarty West	17	68	21	27	31
Skye and Lochalsh	64	100	85	122	70
Sutherland	20	32	76	80	73
Grand Total	821	1522	1385	1058	1000

To look back at historic House Completions to date - this link takes you to the maintained dashboard and interactive map for completions in the Highland Council area to the end of March 2026 [HOUSE COMPLETIONS](#)

3 Summary

3.1 Green and Brownfield Sites

3.2 A high proportion of programmed development (8.7% in the 10 year pipeline) is expected to be delivered on "Brownfield" sites as shown below:

Site Type	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
Brownfield	64	109	128	120	61	65	68	45	45	45
Greenfield	552	770	1159	1274	1058	1085	813	750	628	541

3.3 The larger brownfield sites in the pipeline are in Aviemore, Conon Bridge, Dingwall, Fort William, Inverness and Tain.

3.4 Programming by Ward

3.5 The highest proportions of the 10 year programming are found in the Ward 17 - Culloden and Ardersier (18.2%) and Inverness South (12.5%) these two accounting for almost 2900 of the 9380 programmed in the first 10 years.

3.6 Other wards with higher numbers of programmed housing delivery include Ward 15 - Inverness Ness-side (852) and ward 6 - Cromarty Firth (771)

3.7 The lowest programming totals are in Wards 1 - North West and Central Sutherland, 2 Thurso and Northwest Caithness and 3 - Wick and East Caithness - each with less than 0.5% of the total 10 year programmed delivery totalling (128 residential units over 10 years)

Ward No	Ward Name	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	2034-35
1	North, West and Central Sutherland	1	0	0	27	4	1	1	0	2	3
2	Thurso and Northwest Caithness	8	1	0	0	0	0	10	10	10	10
3	Wick and East Caithness	7	5	7	4	2	0	5	5	5	0
4	East Sutherland and Edderton	68	52	21	21	38	17	9	4	9	2
5	Wester Ross, Strathpeffer and Lochalsh	6	12	29	40	38	42	7	1	0	0
6	Cromarty Firth	37	19	194	101	140	204	40	26	10	0
7	Tain and Easter Ross	0	16	30	86	90	76	25	25	25	25
8	Dingwall and Seaforth	48	56	159	131	81	94	41	35	15	15
9	Black Isle	0	24	38	66	53	55	53	20	0	0
10	Eilean a' Cheò	0	44	36	94	70	65	35	35	36	30
11	Caol and Mallaig	9	55	11	11	34	52	12	13	11	7
12	Aird and Loch Ness	44	106	27	47	50	18	33	43	43	44
13	Inverness West	27	43	57	48	60	82	30	30	30	30
14	Inverness Central	0	8	0	4	0	20	20	0	25	25
15	Inverness Ness-side	70	57	54	130	116	60	124	121	70	50
16	Inverness Millburn	0	0	0	0	0	0	45	90	125	125
17	Culloden and Ardersier	111	59	234	187	130	211	225	185	185	195
18	Nairn and Cawdor	9	67	79	80	46	4	4	4	2	2
19	Inverness South	45	148	242	190	131	73	137	131	60	13
20	Badenoch and Strathspey	120	107	55	32	26	33	19	17	10	10
21	Fort William and Ardnamurchan	6	0	14	95	10	43	6	0	0	0
	Grand Total	616	879	1287	1394	1119	1150	881	795	673	586

3.8 The timing within the 10 year pipeline varies considerably with ward 16 - Inverness Millburn expected to deliver 100% of programming for that ward in the

Long-term (years 7-10) and ward 14 Inverness Central nearly 70% of its 10 year total in this latter period.

3.9 Ward 20 - Badenoch and Strathspey is programmed to deliver almost 66% of all programming for the ward in years 1-3, the Short-term pipeline.

3.10 Delivery Pipeline Summary Graphs for years 1-10 click on the top menu title

3.11 To interrogate specific sites or settlements select "Housing Sites Map" from the top menu

3.12 **Next Review**

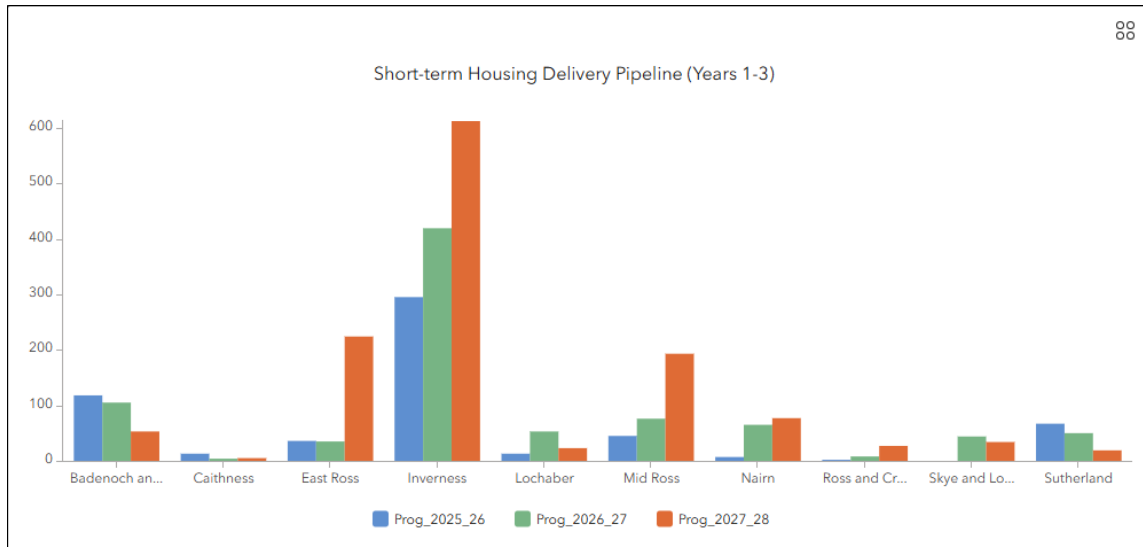
3.13 This Housing Land Audit is updated annually with site assessments updated and additional sites considered for addition/removal. It will next be reviewed based upon a snapshot of planning application data and housing deliveries taken on 1st April 2026.

3.14 The Housing Land Audit is used to feed into the Housing Needs and Demand Assessment and provides an evidence base for Development Plans.

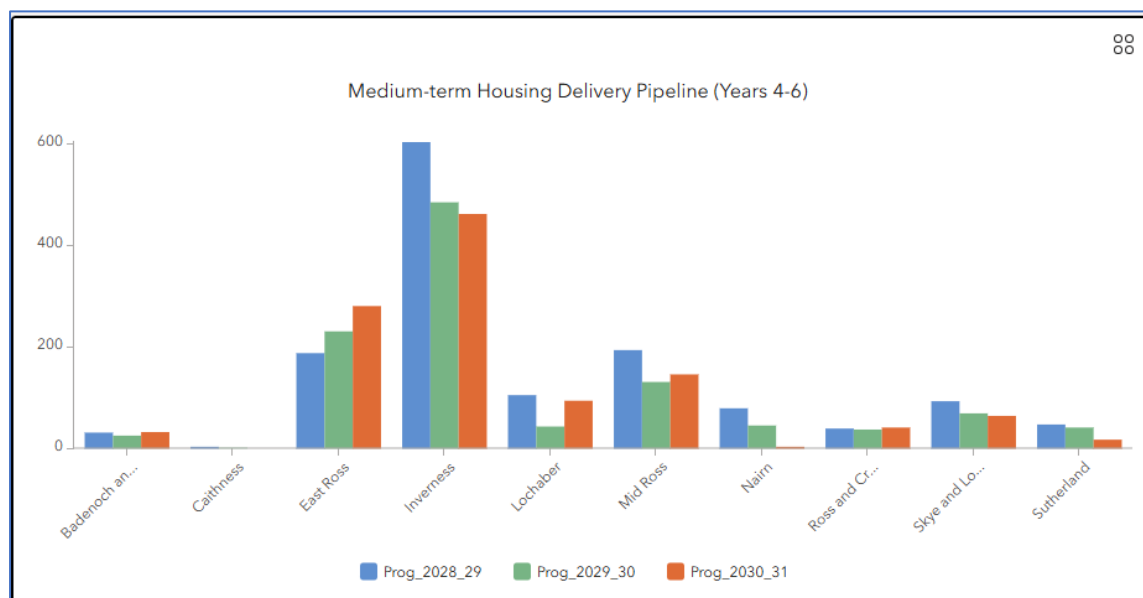
3.15 The previous 2024 Housing Land Audit remains available for reference via the following links [Housing Land Audit 2024 StoryMap](#), the [2024 Interactive Map](#), download the [Summary Document](#), or the [Sites Table](#).

4 Delivery Pipeline Summaries by Housing Market Area (HMA)

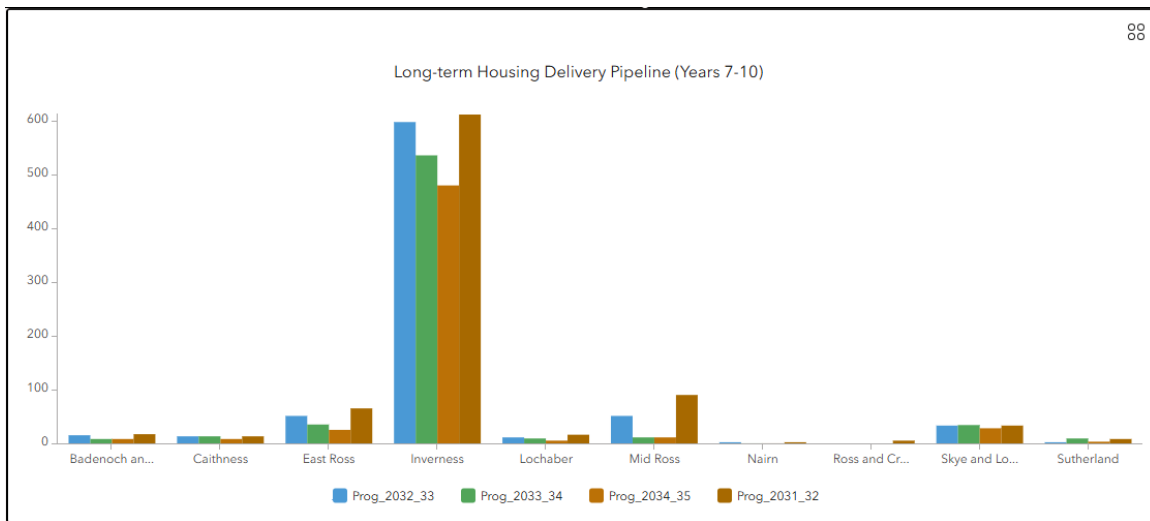
Short Term Housing Delivery Pipeline (Years 1-3)



Medium Term Housing Delivery Pipeline (Years 4-6)



Long Term Housing Delivery Pipeline (Years 7-10)



5 Housing Site Map – Interactive Mapping

5.1 The interactive mapping allows the user to display the detailed programming figures for housing used in this audit down to individual site level. There are 344 sites in this audit and it is much more effective to allow users to inspect sites for context with the latest available backdrop mapping and aerial photography. This can be accessed in a web browser from this link to the [Housing Sites Map](#)

- Zoom and pan from the buttons on the left or through mouse interactions
- Search the map using the search function either for a Settlement (SDA) or for a site name or Site Code from the Housing Land Audit Note that the Layers button on the left also gives access to the Legend for this layer.
- Click on a specific site to see the attributes for each HLA Ste including: Delivery pipeline
- Constraints
- Programmed Delivery Year and Unit count for each year
- You can change the Basemap to this map using the button on the right hand side as required.

5.2 Colour coding of sites is as follows:

