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Revised 2018-2033 Local Development Plan

Position Statement Local Housing Market Assessment

April 2024

Carmarthenshire Local Housing Market Assessment (LHMA)

1. Summary of previous LHMA

1.1 Carmarthenshire's previous LHMA was completed in Autumn 2019, as part of a consortium with 5 other neighbouring unitary authorities as well as Brecon Beacons and Pembrokeshire Coast National Parks. The work was carried out by ONS, supervised by a steering group with representatives from each authority.

1.2 Housing need was projected over the timespan of the draft Local Development Plan to 2033, using a combination of publicly available data and in-house data such as the housing register and letting of social housing.

2. Updated Local Housing Market Assessment 2024

Why Now? (Timescales)

2.1 The last housing market assessment was carried out in 2019. Welsh Government requires that we carry out a new housing market assessment every five years. There is a new requirement that we do a refresh of the figures, but not a full re-write, between years 2 and 3 of the cycle (namely some time in 2026 or 2027).

2.2 The next full re-write will take place in 2029.

Changes to methodology

2.3 A Wales-wide methodology has been developed for this assessment, jointly by Welsh Government and the 22 unitary authorities. There is an Excel-based calculation tool, which ensures that all 22 authorities carry out the calculation in the same way. The tool has been revised a number of times to correct unforeseen bugs and speed up the calculation time.

Inputs

2.4 The LHMA requires published and in-house data as follows:

- Definition of housing market areas with ward codes used by UK Government
- Welsh Government household projections
- Carmarthenshire County Council household projections (as used in developing the Local Development Plan)
- Private sector, open market rents by area and number of bedrooms
- Income data by housing market area from CACI Paycheck
- House price data from Land Registry (collated by Welsh Government in the tool)
- Current unmet housing need, from housing register data. Our register includes all the main social housing providers in the County.
- Existing affordable housing stock; likely turnover based on three-year average
- Planned provision of new affordable housing

Assumptions

2.5 Assumptions about future behaviour of key indicators, such as house prices; rents; incomes and inequality are provided by the Office of Budgetary Responsibility. These assumptions can be

over-ridden if the authority has better evidence. We have not chosen to over-ride any of the Office of Budgetary Responsibility default figures.

2.6 The outputs of the LHMA have been calculated based on Carmarthenshire’s household projections and for each of the three Welsh Government projections (lower, principal and higher). These are compared in the document. Housing need figures are highest when the Carmarthenshire housing projections are used, and lowest with the lower Welsh Government household projection.

Publication

2.7 The document will be translated into Welsh and published on the Council's website.

Summary results

2.8 The output figures are not directly comparable with those in the 2019 LHMA. The latter were total numbers of households requiring either open market or affordable homes. These two figures added up to the total number of households in the County at the time, or the projected number. The 2024 LHMA estimates the additional number of households requiring different tenures and different sizes of home, per year. The remaining number of households are assumed to be occupying suitable housing, or housing which is capable of being improved or adapted to suit the household.

2.9 The following are key results copied from the LHMA document:

Figure 10

Average annual additional housing need 2022 to 2027	Projections compared			
	Lower	Principal	Higher	CCC
	Owner occupier	29	73	107
Private rented	27	68	99	134
Low cost ownership	220	230	238	250
Intermediate rented	605	612	618	626
Social rented	379	427	427	513
TOTAL	1260	1411	1528	1674

Figure 18: Annual Additional Housing Need Estimates by Tenure – All Tenures – 2024 to 2027 (based on Carmarthenshire County Council household projection).

Housing Market Area	Owner occupier	Private rented	Low cost ownership	Intermediate rented	Social rented	TOTAL
Ammanford and the Amman Valley	44	43	40	98	100	325
Carmarthen and the West	40	42	57	136	115	389
Llanelli and District	63	49	128	330	271	842
Rural Carmarthenshire and Market Towns	4	5	23	60	26	118

Source: Carmarthenshire County Council / Welsh Government LHMA Tool

Figure 19: Annual Additional Need for Social Rented, 2024 to 2027, by number of bedrooms (based on Carmarthenshire County Council household projection).

Housing Market Area	One bedroom	Two bedroom	Three bedroom	Four + bedrooms
Ammanford and the Amman Valley	59	22	15	4
Carmarthen and the West	57	33	19	6
Llanelli and District	151	72	32	17
Rural Carmarthenshire and Market Towns	15	6	3	2
Total	282	133	70	29

Source: Carmarthenshire County Council / Welsh Government LHMA Tool