Housing Statistics for Scotland, Quarterly Update: New Housebuilding and Affordable Housing Supply to end December 2023

Key Points

New Housebuilding

- There were 20,992 all-sector new build home completions and 16,017 starts in Scotland during 2023 (calendar year). There were fewer homes completed (2,701 fewer; 11% decrease) and started (5,009 fewer, 24% decrease) in 2023 than in 2022.
- Private sector starts at 12,752 homes, were at the lowest level since 2020 when the COVID-19 pandemic impacted housebuilding through health protection restrictions, before this, 2013 was the lowest number.
- Housing association starts (2,073 homes) in 2023 were at the lowest number since 1988. It is important to remember that before April 2018, approvals are used in the place of housing association starts as a better-quality indicator. Local authority starts (1,192 homes) in 2023 were at the lowest number since 2013.
- Fewer homes were completed and started across the private and social sector in 2023 compared with 2022. Private sector house completions decreased by 9% (1,449 homes), housing association completions decreased by 12% (534 homes) and local authority completions decreased by 30% (718 homes). House starts decreased in the private sector by 20% (3,258 homes), as well as in local authority led starts (49% decrease; 1,152 homes) and housing association starts (22% decrease, 599 homes).
- When comparing quarter 4 of 2023 to quarter 4 of 2022, there were decreases in the number of housebuilding starts through the private sector (8% decrease; 254 fewer homes) and housing associations (16% decrease; 62 fewer homes). Whereas local authority led starts increased by 9% (35 additional homes).
- There were also quarterly decreases compared to the previous year in housebuilding completions led by the private sector (12% decrease, 582 fewer homes) and housing associations (35% decrease; 447 fewer homes) but a 28% increase in local authority led completions (105 additional homes).

Affordable Housing Supply Programme

- Affordable Housing Supply Programme statistics reflect the broader supply of affordable homes for social rent, affordable rent, and affordable home ownership, and include off the shelf purchases and rehabilitations as well as new builds.

- In 2023 (calendar year), there were 6,239 approvals, 6,046 starts, and 9,680 completions of affordable homes.
- When comparing 2023 with 2022, decreases were reported in affordable housing supply approvals (316 homes, 5% decrease), starts (1,546 homes, 20% decrease), and completions (493 homes, 5% decrease).
- Affordable housing supply approvals were the lowest since 2012, starts were the lowest since 2013 and completions were the lowest since 2021.
- When comparing Quarter 4 of 2023 to Quarter 4 of 2022, approvals increased by 5% (60 homes), starts decreased by 20% (257 homes) and completions decreased by 33% (903 homes).
- These statistics are used to inform progress against Scottish Government affordable housing delivery targets. The ambition is to deliver 110,000 affordable homes by 2032, of which at least 70% will be for social rent and 10% will be in remote, rural and island communities. There has been a total of 17,619 affordable homes completed between 23 March 2022 and 31 December 2023 towards the target of 110,000 affordable homes by 2032, consisting of 13,483 (77%) homes for social rent, 2,126 (12%) for affordable rent, and 2,010 (11%) for affordable home ownership.

Introduction

This statistical publication presents latest annual figures to end December 2023 on new housebuilding and Affordable Housing Supply, along with annual rates of new housebuilding and affordable housing supply per head of population, with comparisons to other UK countries. The latest quarterly data and comparisons to the corresponding quarter the year before are presented.

Timeseries for quarterly and annual data, along with local authority breakdowns, are contained in the supporting Excel tables.

An Accredited Official Statistics Publication for Scotland

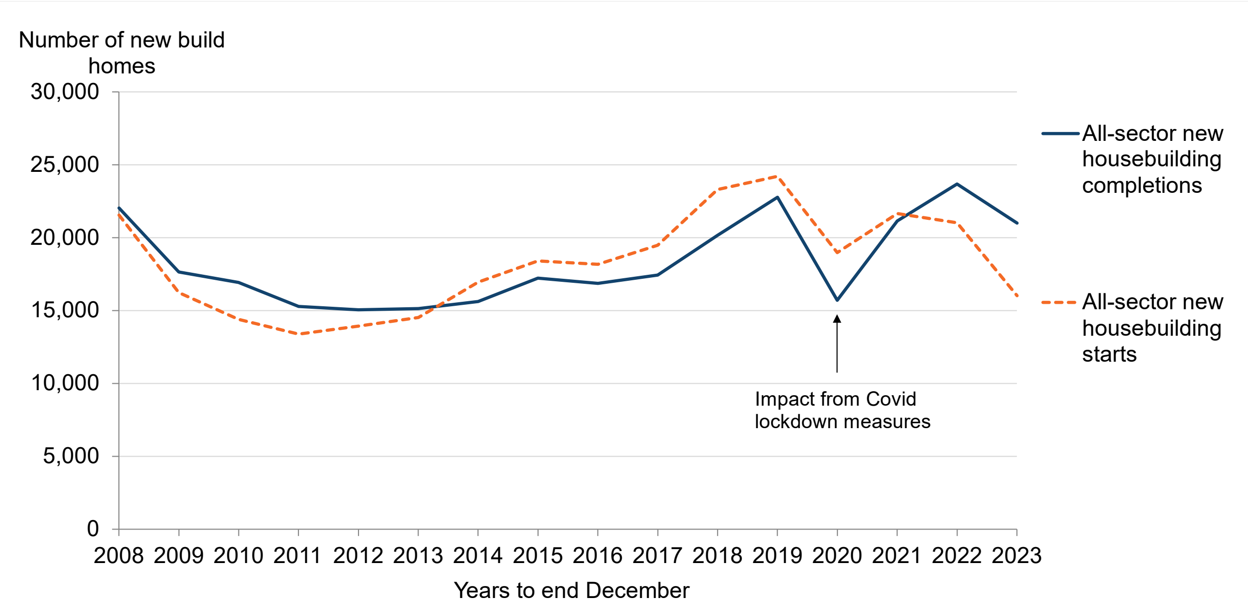
The United Kingdom Statistics Authority has designated these statistics as Accredited Official Statistics, in accordance with the Statistics and Registration Service Act 2007. This provides assurance that these statistics are of the highest quality and meet user needs, and that they comply with the Code of Practice for Statistics.

Further information on Accredited Official Statistics is published by the UK Statistics Authority.

All-Sector New Housebuilding

There were 20,992 homes completed and 16,017 new builds started in 2023 (ending December). House building completions and starts decreased in 2023 compared with 2022, as Chart 1 indicates.

Chart 1: Annual all-sector new housebuilding starts and completions decreased by 24% (5,009 home) and 11% (2,701 homes) respectively, in the latest year to end December 2023.

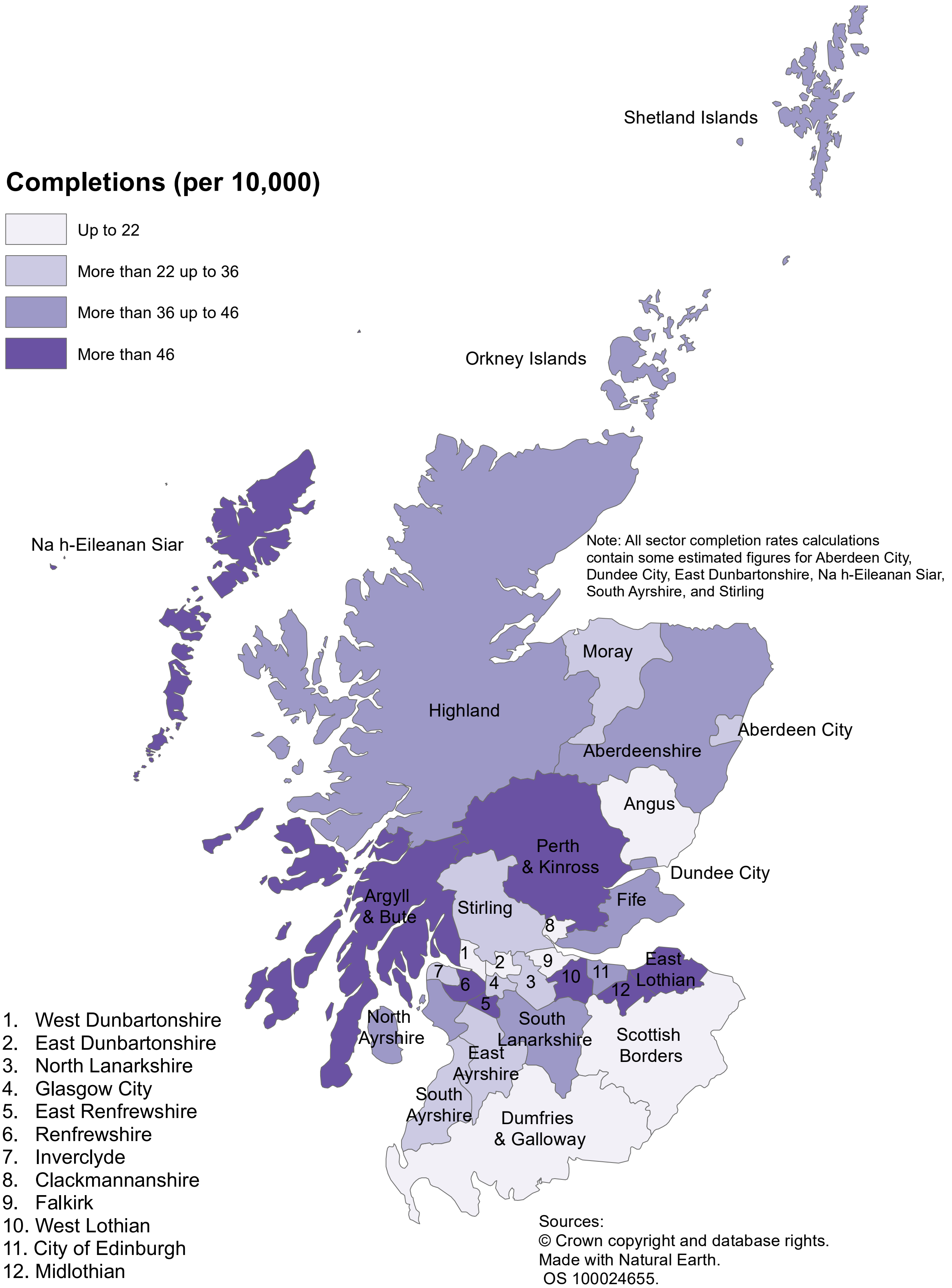


Map A below shows that in the year to end December 2023, the highest new build rates were observed in the local authority areas of Argyll & Bute, East Lothian, East Renfrewshire, Midlothian, Na h-Eileanan Siar, Perth & Kinross, Renfrewshire and West Lothian which each had rates of more than 46 homes per 10,000 population.

The lowest rates were observed in Angus, Clackmannanshire, Dumfries & Galloway, East Dunbartonshire, Falkirk, Scottish Borders and West Dunbartonshire which each had rates of 22 homes or fewer per 10,000 population.

Note that all-sector completion rates calculations contain some estimated figures for Aberdeen City, Dundee City, East Dunbartonshire, South Ayrshire and Stirling. Further details are in the Data and Methodology section.

Map A: New build housing – All Sector completions: rates per 10,000 population, year to end December 2023.



Sources:

Made with Natural Earth.
OS 100024655.
The Scottish Government 26 March 2024

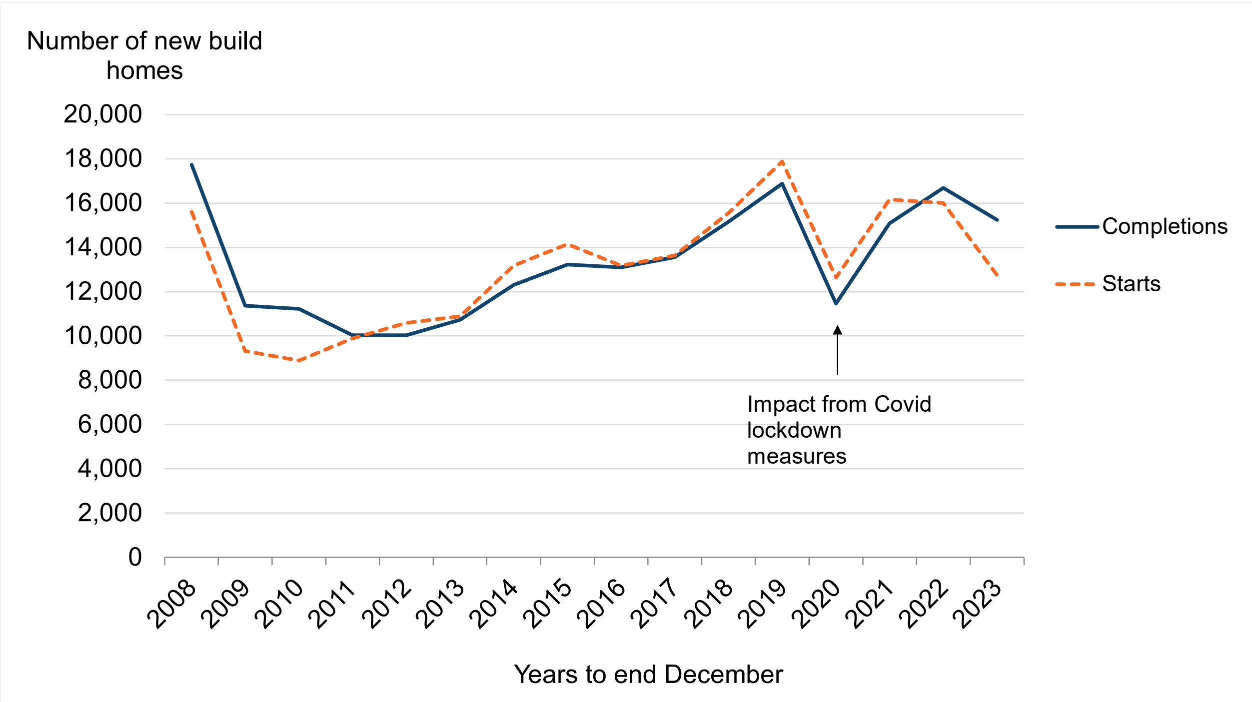
The latest quarterly data and comparison to the corresponding quarter in the previous year are shown in the ‘Quarterly Comparisons’ section. Timeseries data along with local authority breakdowns are contained in the supporting Excel tables.

Private sector led new housebuilding

In 2023, there were 15,236 private sector led housebuilding completions and 12,752 starts. The private sector is the biggest contributor to overall house building, accounting for over two-thirds (73%) of all homes completed in 2023.

Chart 2 shows the annual number of private sector led starts and completions from 2008 to 2023 (years to end December). The latest data shows a decrease in both starts and completions.

Chart 2: Annual private sector led new build completions have decreased by 9% (1,449 homes), whilst starts have decreased by 20% (3,258 homes) in 2023 compared with 2022.

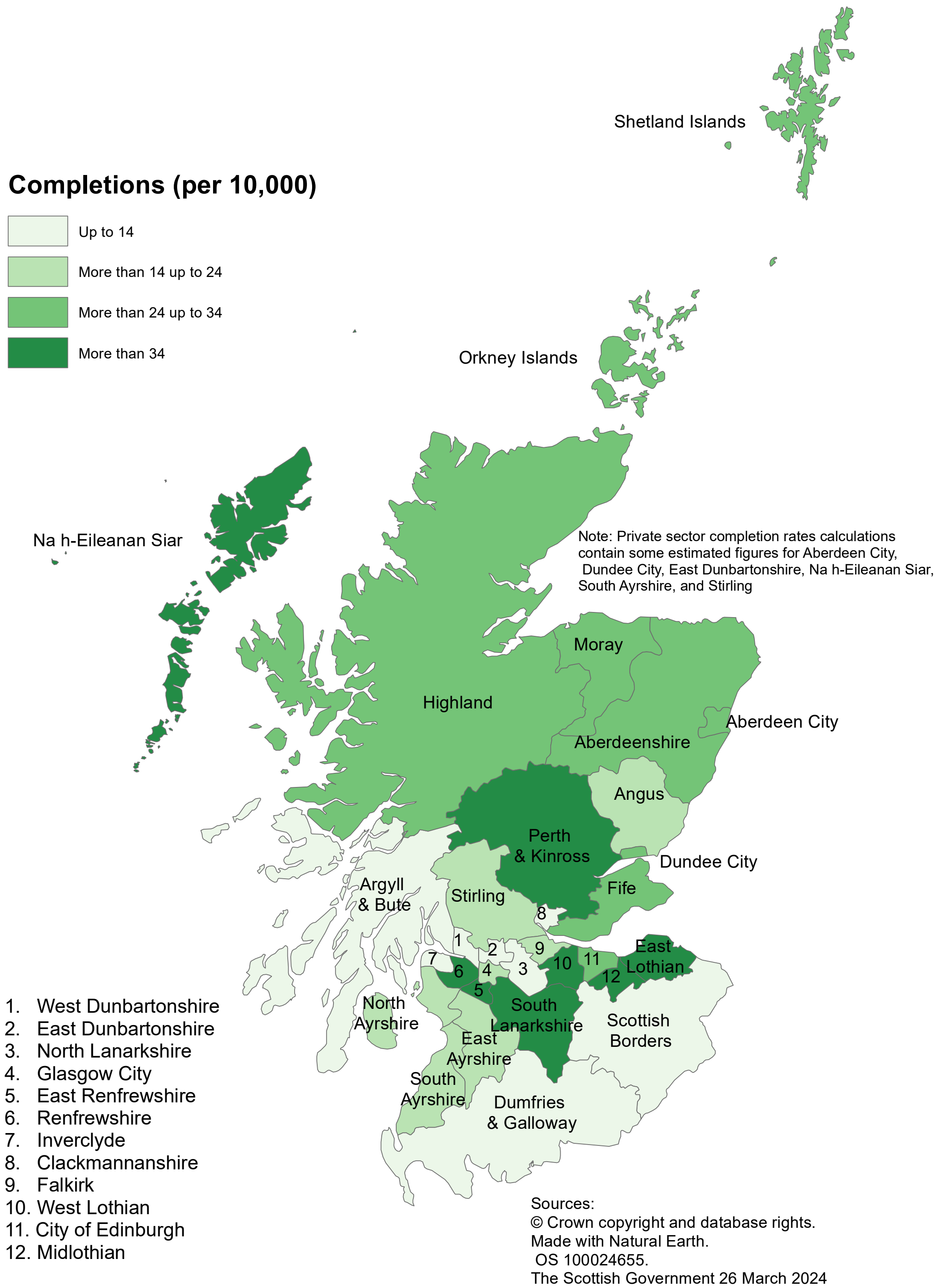


Map B below shows that the local authority areas with the highest private sector led completion rates in the year to end December 2023 are East Lothian, East Renfrewshire, Midlothian, Na h-Eileanan Siar, Perth & Kinross, Renfrewshire, South Lanarkshire and West Lothian with all having a rate of over 34 homes per 10,000 population.

The lowest rates meanwhile are in Argyll & Bute, Clackmannanshire, Dumfries & Galloway, East Dunbartonshire, Inverclyde, North Lanarkshire, Scottish Borders and West Dunbartonshire, with all seeing rates of 14 or fewer homes per 10,000 population.

Note: Private sector completion rates calculations contain some estimated figures for Aberdeen City, Dundee City, East Dunbartonshire, Na h-Eileanan Siar, South Ayrshire, and Stirling. More details are available in the Data and Methodology section.

Map B: New build housing – Private Sector completions: rates per 10,000 population, year to end December 2023.



The latest quarterly data and comparison to the corresponding quarter in the previous year are shown in the 'Quarterly Comparisons' section. Timeseries data along with local authority breakdowns are contained in the supporting Excel tables.

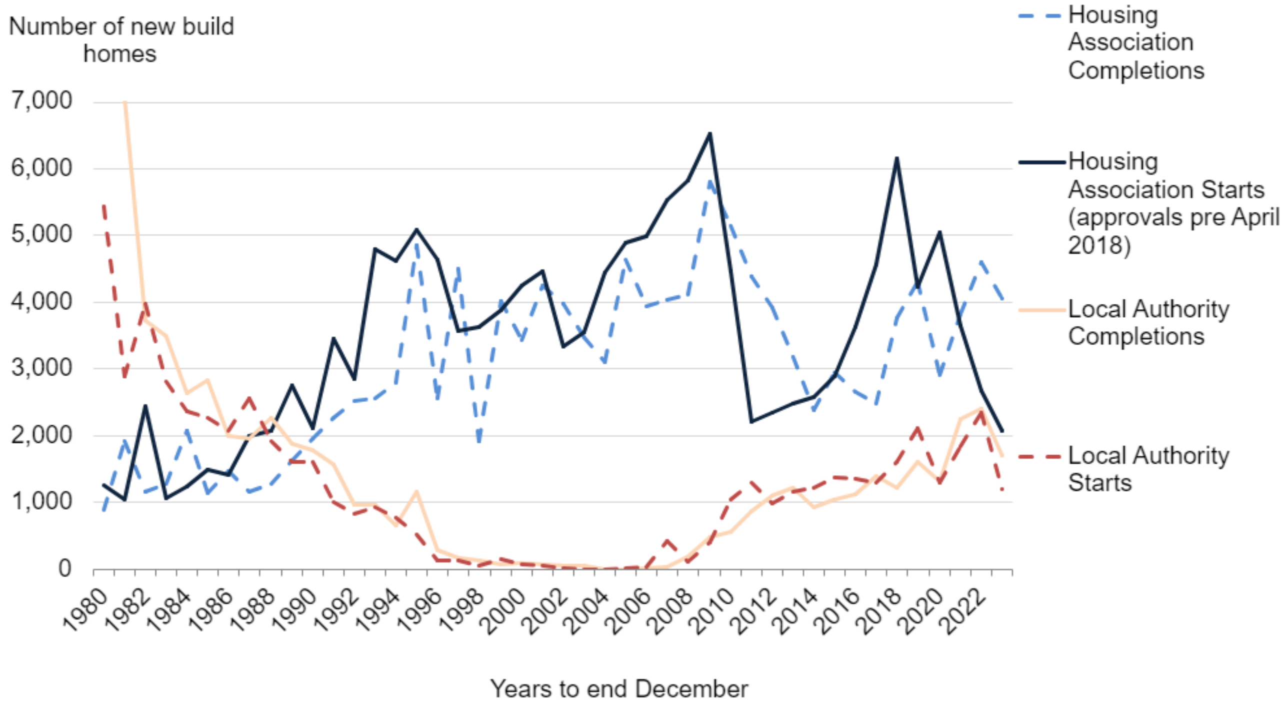
Social sector new housebuilding

The social sector housing (local authority and housing association units combined) accounted for just over a quarter (5,756) of all new build homes completed in 2023 (ending December). Social sector completions in 2023 were down 18% (1,252 homes) from 2022. There were 3,265 starts in the social sector in 2023, down 35% (1,751 homes) from the year before.

Chart 3 shows the number of local authority and housing association homes started and completed each year. There were 1,697 local authority led completions and 1,192 starts in 2023. There were 4,059 housing association led completions and 2,073 starts in 2023.

There were annual decreases between 2022 and 2023 reported for building starts and completions for housing associations and local authorities. Housing association completions decreased by 12% (534 homes) and local authority completions decreased by 30% (718 homes). Local authority led starts decreased (49% decrease; 1,152 homes) as well as housing association starts (22% decrease, 599 homes).

Chart 3: Housing association starts in 2023 were at the lowest number since 1988. Local authority starts in 2023 were at the lowest number since 2013.



Maps C and D below show the rates of housing association and local authority new build completions in each local authority area for the year to end December 2023 per 10,000 of the population.

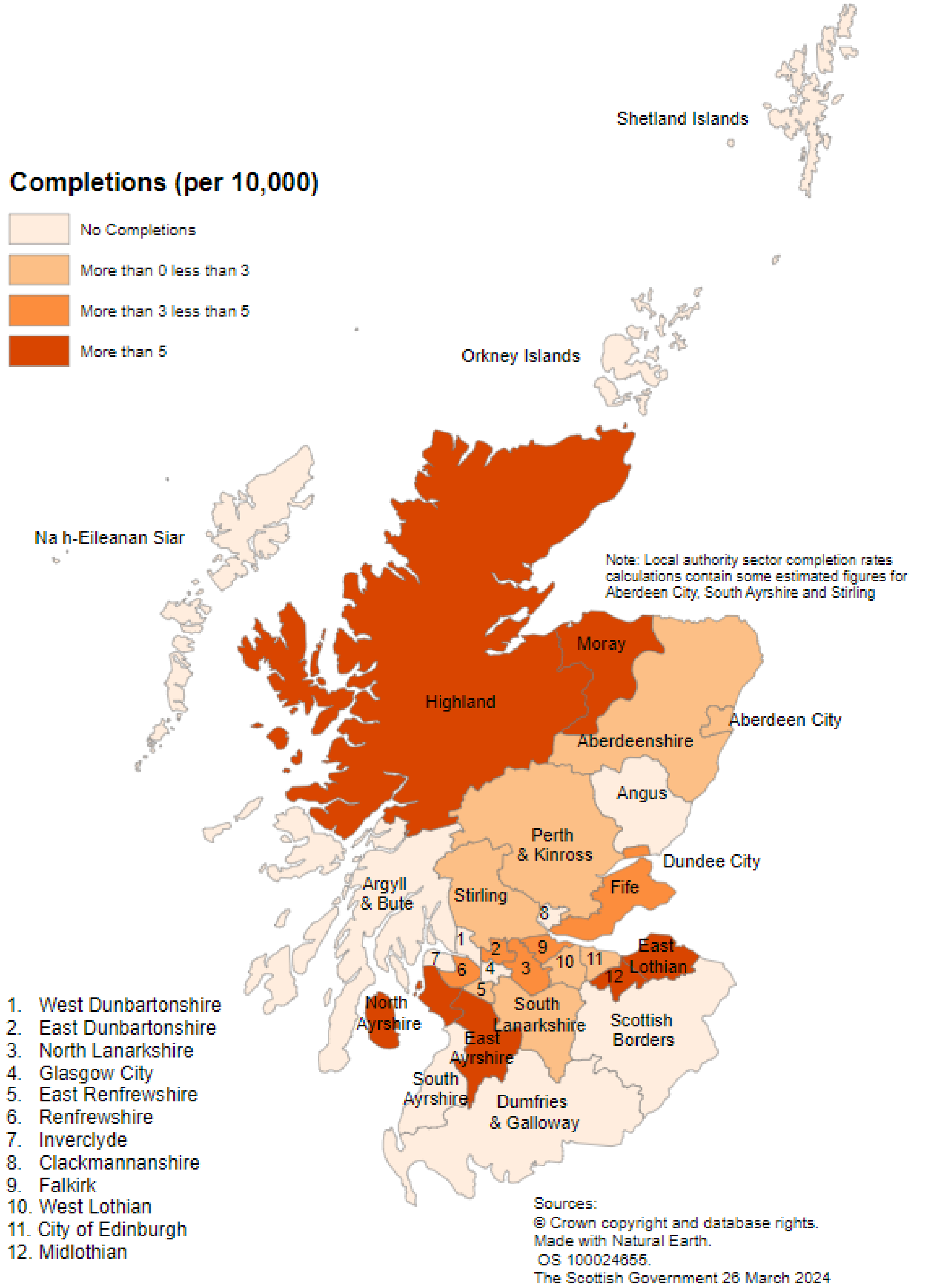
In the year to end December 2023 local authority sector new build rates were highest in East Ayrshire, East Lothian, Highland, Midlothian, Moray, and North Ayrshire, and with all having rates of over 5 homes per 10,000 population.

Note that the housing stock of 6 local authorities (Argyll & Bute, Dumfries & Galloway, Glasgow, Inverclyde, Na h-Eileanan Siar and Scottish Borders) has been transferred to housing associations and so these areas do not build new local authority houses. As well as the 6 stock transfer authorities mentioned above, Angus, Clackmannanshire, Orkney, Shetland Islands, South Ayrshire and West Dunbartonshire built no new local authority sector homes in the year ending December 2023.

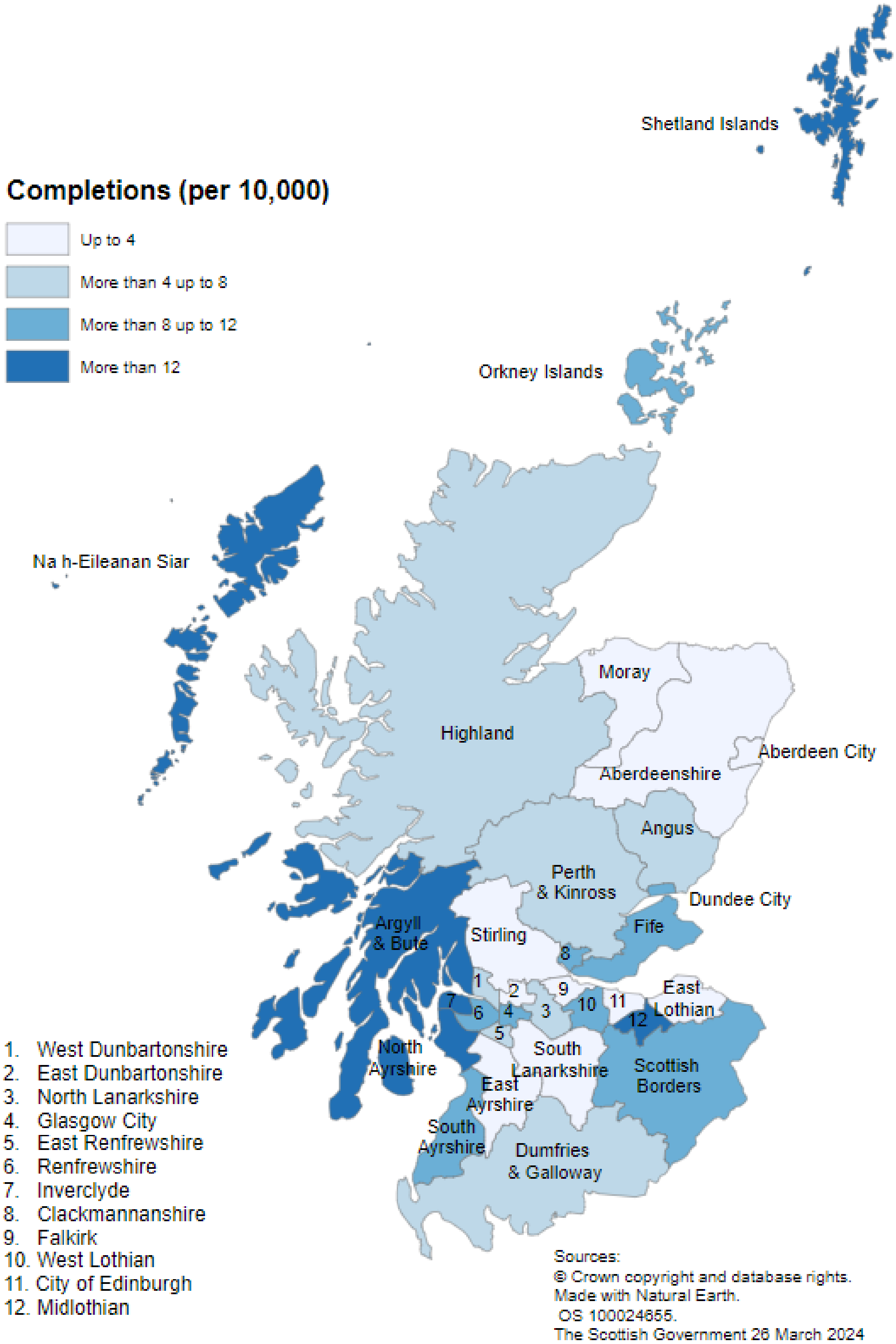
Meanwhile rates of housing association new build completions were highest in Argyll & Bute, Inverclyde, Midlothian, Na h-Eileanan Siar, North Ayrshire and the Shetland Islands all having rates of over 12 homes per 10,000 population.

Aberdeen City, Aberdeenshire, East Ayrshire, East Dunbartonshire, East Lothian, Edinburgh, Falkirk, Moray, South Lanarkshire and Stirling all had a rate less than 4 housing association homes per 10,000 population.

Map C: New build housing – Local Authority Sector completions: rates per 10,000 population, year to end December 2023.



Map D: New build housing – Housing Association Sector completions: rates per 10,000 population, year to end December 2023.



The latest quarterly data and comparison to the corresponding quarter in the previous year are shown in the 'Quarterly Comparisons' section. Timeseries data along with local authority breakdowns are contained in the supporting Excel tables.

Quarterly comparisons

Overall, across all sectors, there were 3,859 starts and 5,391 completions in the last quarter of 2023. There were 3,126 starts and 4,086 private led completions. In the social sector there were 733 starts and 1,305 completions. Further breakdowns are in Tables 1 & 2, which show the number of quarterly starts and completions in 2022 and 2023.

Comparisons of quarterly data should be made to the corresponding quarter in a previous year as there have been no seasonal adjustments made to the data. Comparisons in Chart 4 and Chart 5 focus on quarterly comparisons between 2023 and 2022.

As Chart 4 shows, there were decreases in the number of housebuilding starts through the private sector (8% decrease; 254 fewer homes) and housing associations (16% decrease; 62 fewer homes) when comparing quarter 4 of 2023 to quarter 4 of 2022. Whereas local authority led starts increased by 9% (35 additional homes).

There were also quarterly decreases in completions led by the private sector (12% decrease, 582 fewer homes) and housing associations (35% decrease; 447 fewer homes) but a 28% increase in local authority led completions (105 additional homes). This is illustrated in Chart 5.

Table 1: Housebuilding starts for 2022 and 2023, by quarter

	Q1 Jan - Mar 2022	**Q2 Apr - Jun 2022**	**Q3 Jul - Sep 2022**	**Q4 Oct - Dec 2022**	**Q1 Jan - Mar 2023**	**Q2 Apr - Jun 2023**	**Q3 Jul - Sep 2023**	**Q4 Oct - Dec 2023**
Private led	3,750	4,776	4,104	3,380	2,922	3,586	3,118	3,126
Local Authority	804	724	440	376	348	243	190	411
Housing Assoc.	1,133	299	856	384	653	364	734	322
Social sector	1,937	1,023	1,296	760	1,001	607	924	733
All sector	5,687	5,799	5,400	4,140	3,923	4,193	4,042	3,859

Table 2: Housebuilding completions for 2022 and 2023, by quarter

	Q1 Jan - Mar 2022	Q2 Apr - Jun 2022	Q3 Jul - Sep 2022	Q4 Oct - Dec 2022	Q1 Jan - Mar 2023	Q2 Apr - Jun 2023	Q3 Jul - Sep 2023	Q4 Oct - Dec 2023
Private led	3,562	4,091	4,364	4,668	3,718	3,982	3,450	4,086
Local Authority	870	360	810	375	397	370	450	480
Housing Assoc.	1,115	897	1,309	1,272	1,538	608	1,088	825
Social sector	1,985	1,257	2,119	1,647	1,935	978	1,538	1,305
All sector	5,547	5,348	6,483	6,315	5,653	4,960	4,988	5,391

Chart 4: Local authority led starts were higher in the last quarter of 2023 compared with 2022, whereas private sector led starts and housing association starts were lower.

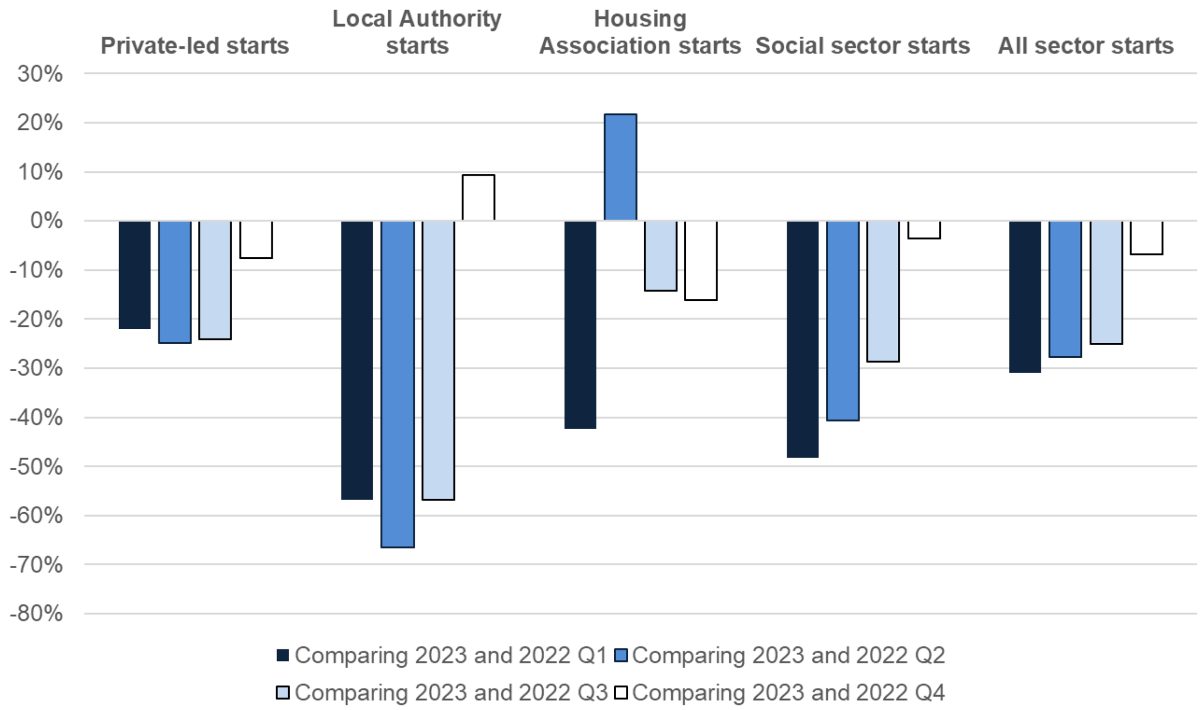
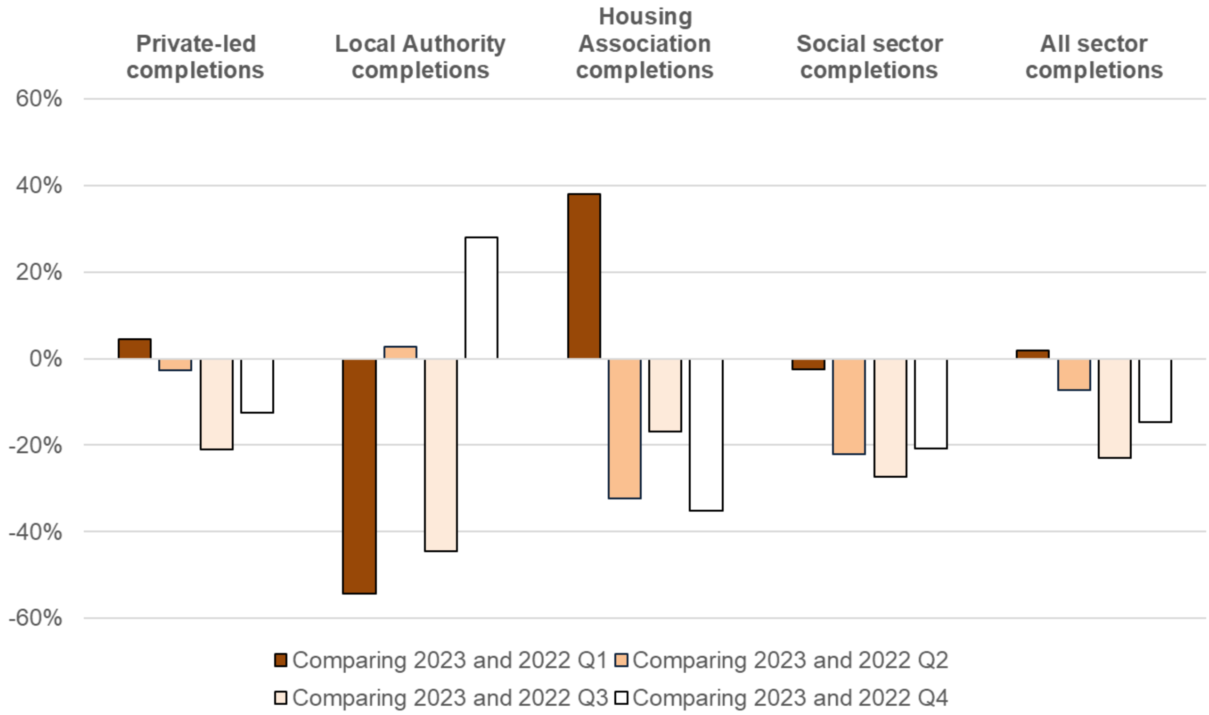


Chart 5: Local authority led completions were higher in the last quarter of 2023 compared with 2022, whereas private sector led completions and housing association completions were lower.



Timeseries data along with local authority breakdowns are contained in the supporting Excel tables.

Affordable housing supply

Affordable Housing Supply Programme statistics reflect the broader supply of affordable homes (i.e. for social rent, affordable rent and affordable home ownership), and include off the shelf purchases and rehabilitations as well as new builds. Latest statistics are available up to the end of December 2023.

The statistics reflect the number of affordable homes delivered that have received some form of government support through loans, grant or guarantees.

Approvals, starts and completions are all measured for the Affordable Housing Supply Programme. Approval is the point at which funding is granted. Starts are recorded when an on-site presence is established to progress site work. Completion measures when the units are delivered and ready for occupation.

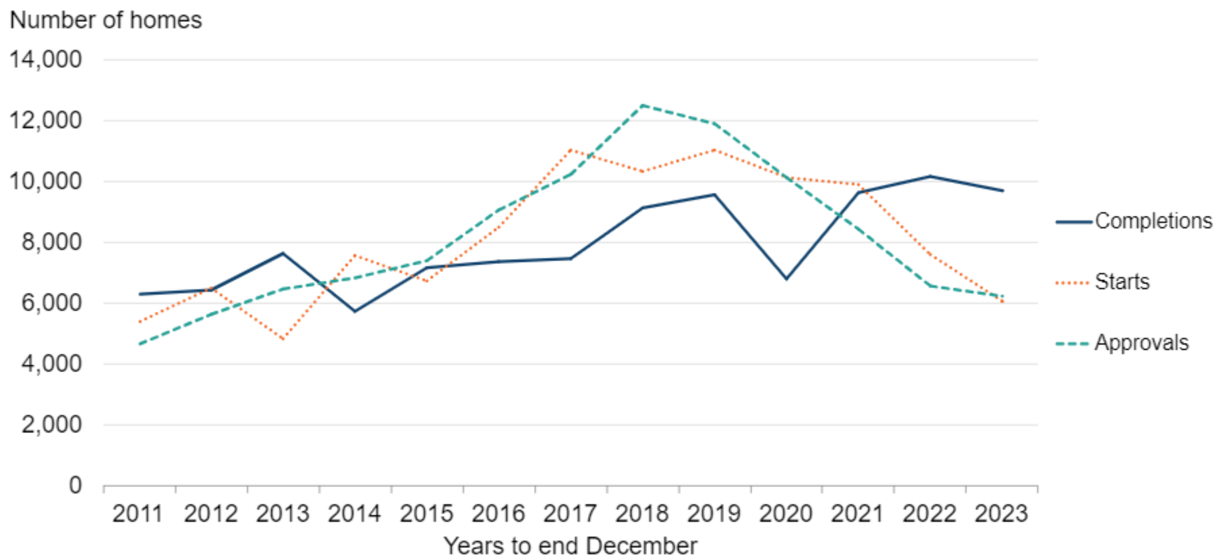
Social Rent includes Housing Association Rent, Council House Rent as well as Home Owner Support Fund Rent.

Affordable Rent includes Mid-Market Rent (MMR), National Housing Trust (NHT) Rent as well as other programmes such as the Empty Homes Loan Fund (EHLF) and Rural Homes for Rent (RHfR).

Affordable Home Ownership includes Open Market Shared Equity (OMSE), New Supply Shared Equity (NSSE), Shared Ownership (LCHO) as well as other programmes such as Home Owner Support Fund Shared Equity.

As Chart 6 shows, in the year to end December 2023, 6,239 affordable homes were approved, a decrease of 5% (316 homes) on the previous year. In 2023, 6,046 affordable homes were started, a decrease of 20% (1,546 homes) compared with 2022. A total of 9,680 affordable homes were completed in 2023, a decrease of 5% (493 homes) on the previous year.

Chart 6: In 2023, affordable housing supply approvals were the lowest since 2012, starts were the lowest since 2013 and completions were the lowest since 2021 (where COVID-19 impacted housebuilding through health protection restrictions).



Charts 7 to 9 below present information on trends in affordable housing supply by type. Just over 70% of approvals, starts, and completions were for social rent in 2023.

Chart 7 shows decreases in the last year in the number of approvals for social rent (by 13% or 634 homes) and for other affordable rent (by 17% of 145 homes), but an increase in the number of approvals for affordable home ownership by 69% of 463 homes.

Chart 8 shows decreases in the last year in the number of starts for social rent by 27% or 1,612 homes and other affordable rent (by 40% or 369 homes) but increases in the number of affordable home ownership (by 64% or 435 homes).

Chart 9 shows a decrease in the last year in the number of completions for social rent (by 18% or 1,533 homes) and increases in other affordable rent (by 30% or 313 homes) and affordable home ownership has doubled since 2022 (727 homes).

Chart 7: Affordable housing supply approvals by type, 2013 to 2023.

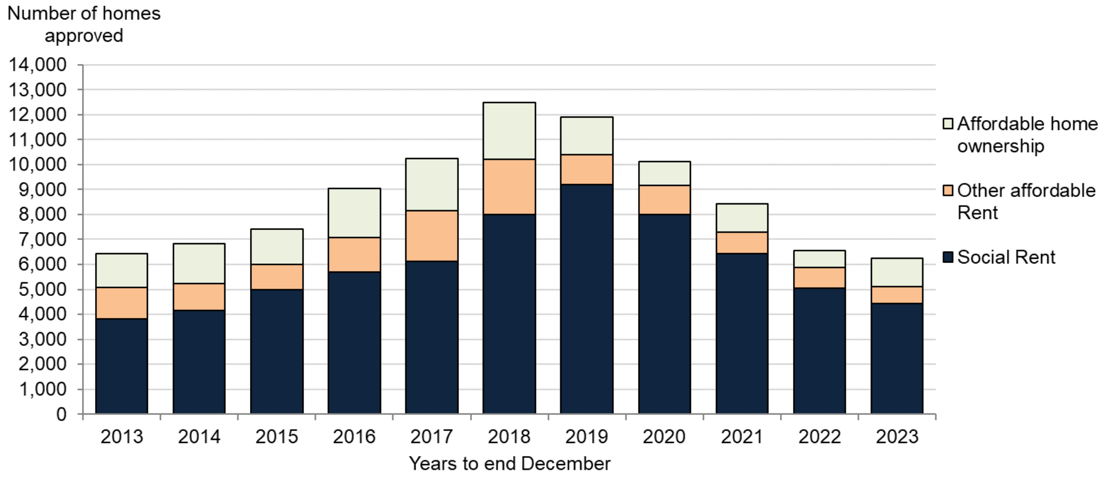


Chart 8: Affordable housing supply starts by type, 2013 to 2023.

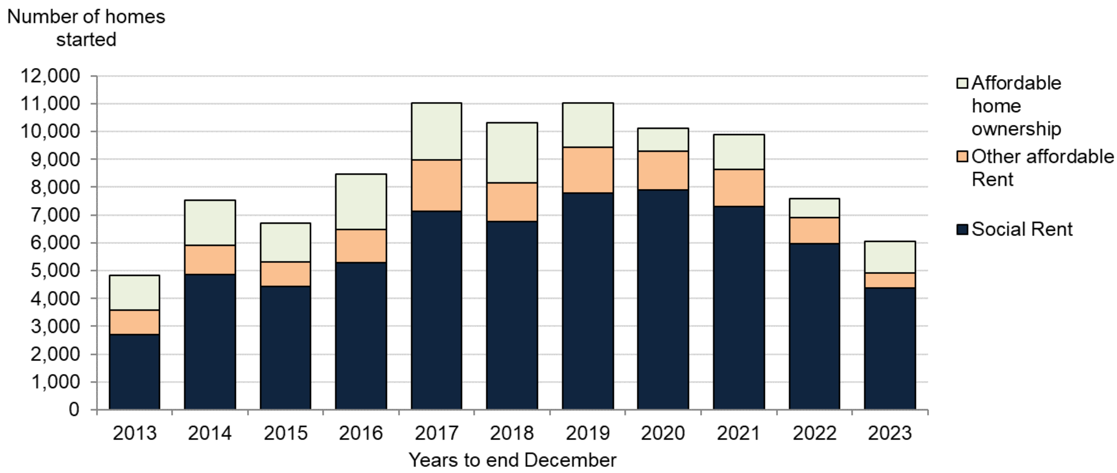
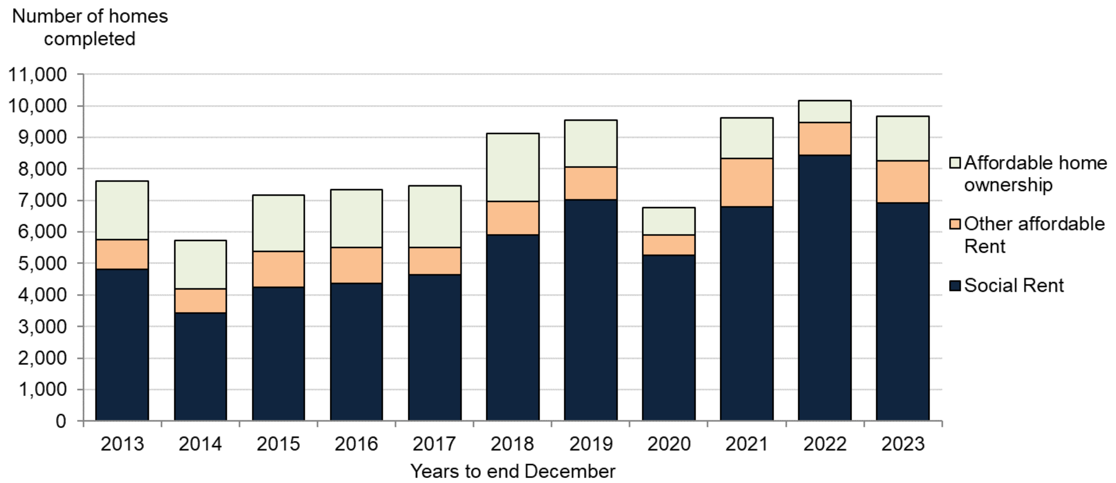


Chart 9: Affordable housing supply completions by type, 2013 to 2023.



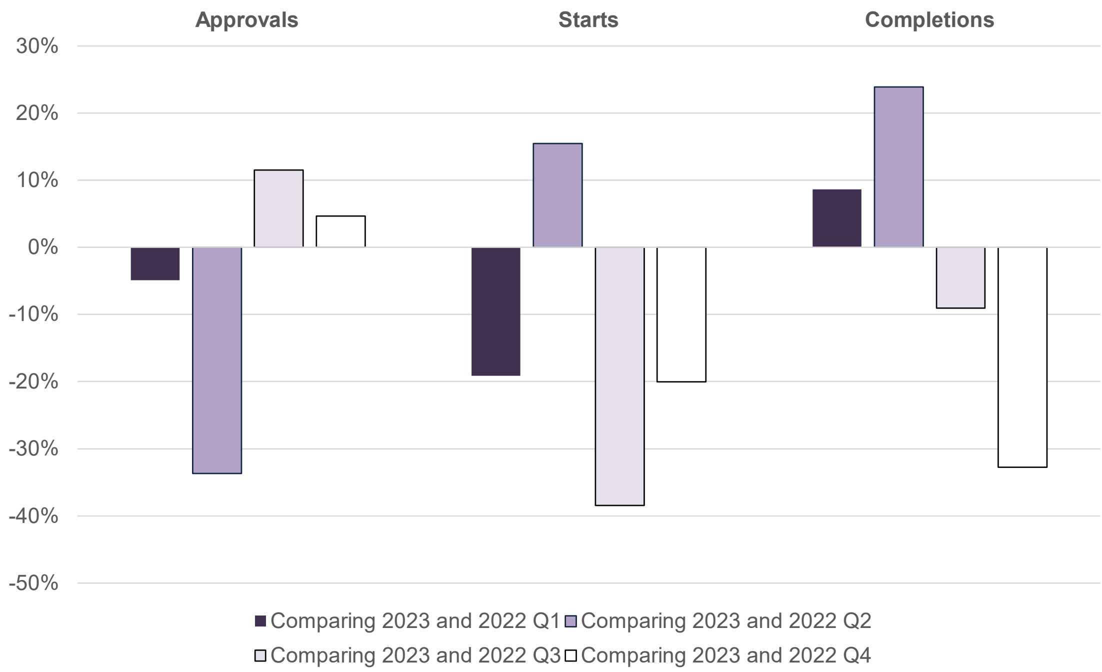
Affordable housebuilding starts, approvals and completions are published on a quarterly basis. Comparisons of quarterly data should be made to the corresponding quarter in a previous year as there have been no seasonal adjustments made to the data. Table 3 presents the number of approvals, starts, and completions for October to December (quarter 4).

Table 3: Affordable housebuilding approvals, starts, and completions for 2022 and 2023, by quarter

	Q1 Jan - Mar 2022	Q2 Apr - Jun 2022	Q3 Jul - Sep 2022	Q4 Oct - Dec 2022	Q1 Jan - Mar 2023	Q2 Apr - Jun 2023	Q3 Jul - Sep 2023	Q4 Oct - Dec 2023
Approvals	3,231	997	1,035	1,292	3,072	661	1,154	1,352
Starts	3,144	984	2,181	1,283	2,542	1,136	1,342	1,026
Completions	3,346	1,485	2,586	2,756	3,635	1,840	2,352	1,853

Comparisons in Chart 10 focuses on quarterly comparisons between 2023 and 2022. Showing approvals increased by 5% (60 homes) in quarter 4 of 2023 compared with the same period in 2023, starts decreased by 20% (257 homes) and completions decreased by 33% (903 homes).

Chart 10: Affordable housebuilding starts and completions are lower in the last two quarters of 2023 compared to 2022; whereas affordable housebuilding approvals are higher in quarter 3 and 4 2023 compared with the previous year



Quarterly affordable housing supply statistics are used to inform progress against Scottish Government affordable housing delivery targets, in which the ambition is to deliver 110,000 affordable homes by 2032, of which at least 70% will be for social rent and 10% will be in remote, rural and island communities.

A total of 17,619 affordable homes have been completed between 23 March 2022 and 31 December 2023 towards the target of 110,000 affordable homes by 2032, consisting of 13,483 (77%) homes for social rent, 2,126 (12%) for affordable rent, and 2,010 (11%) for affordable home ownership.

Timeseries data along with local authority breakdowns as well as further detail on affordable housing supply are contained in the supporting Excel tables.

The **Scottish Government Affordable Housing Supply Programme policy area webpages** also include annual Out-Turn Reports, which provide further detailed programme information for each financial year.

Housing supply (including affordable) across the UK

All-sector housing supply across the UK countries

Comparisons across the UK in housing supply can be made by financial year. Data for the financial year 2023-24 is not yet available. However, our previous publications presented such comparisons up to 2022-23. Where, in 2022-23 in Scotland the completions rate increased to 43 homes per 10,000 people, England's rate was 38 per 10,000 (net additions), Northern Ireland's was 34 per 10,000 and Wales was 18 per 10,000. For a more detailed write up please refer to the December 2023 publication.

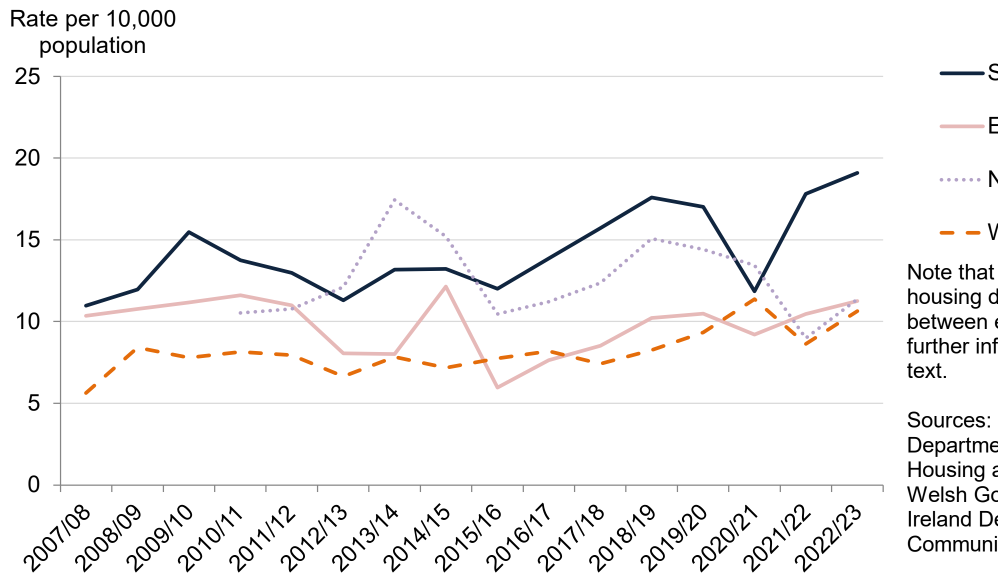
Affordable housing delivery across UK countries

Chart 11 below illustrates how affordable housing delivery figures per 10,000 population have varied on a financial year basis across the 2007-08 to 2022-23 period by UK country.

Across the 15 years between 2007-08 and 2022-23, the annual average delivery of affordable housing per head of population in Scotland has been 14.2 homes per 10,000 population, higher than Wales (8.2 homes per 10,000 population), England (9.8 homes per 10,000 population), and Northern Ireland (12.6 homes per 10,000 population – average across the years 2010-11 to 2022-23).

Scotland has had a higher rate of delivery than all other UK countries in each year but one from 2015/16 to 2022/23, with the rate dropping below the rate for Northern Ireland in the year 2020/21 following COVID-19 restrictions.

Chart 11: The 10,462 affordable homes delivered in Scotland in the latest financial year 2022/23 equates to a rate of 19.1 homes delivered per 10,000 population, compared to 11.4 in Northern Ireland, 11.3 in England and 10.6 in Wales



Note that the detail of affordable housing definitions can vary between each UK country. For further information see the main text.

Sources: Scottish Government; Department for Levelling Up, Housing and Communities; Welsh Government; Northern Ireland Department for Communities.

In addition to the differences in total affordable delivery between each country, there are also some differences in the delivery of different affordable housing products within the mix of overall affordable housing in each country. For example, in England in recent years there has been a greater delivery of affordable / intermediate rent compared to social rent. Therefore, when looking over the four years to 2022-23, in England there have been on average 4.6 affordable / intermediate rent homes delivered per 10,000 head of population and 1.3 social rented homes delivered 10,000 per-head of population. This compares to a rate of 2.1 for affordable rent homes and a rate of 12.4 for social rented homes in Scotland.

Note that the statistics for England and Wales both include developer-funded Section 106 supply, although for England it is thought that some will be missed as local authorities are not aware of it all. Northern Ireland does not currently have an equivalent mechanism. Data for Scotland include Section 75 units receiving some form of government funding. Data are not available to estimate the number of affordable homes delivered without central government funding in Scotland, but it is thought that the numbers of these homes may be relatively low based on current estimates of the number of funded Affordable and Section 75 homes being delivered.

Data and Methodology

This document should be read along with the explanatory notes on data sources and quality can be found in the [Housing Statistics webpages](#).

The statistics break down new build construction activity into private-led and social sector starts and completions, with the social sector further broken down between local authority and housing association activity.

The figures are sourced from local authority administrative systems and the Scottish Government Housing and Regeneration Programme (HARP) system. Private sector construction activity includes not only homes built for private sale but also some homes which are subsequently used in the affordable housing sector and self-build activity by local builders.

New build information is provided for starts (when the foundations are begun) and completions (when a building inspector deems the property complete).

In general, the number of starts will be a strong indicator of the likely trend in completions over the longer term, but there may well be differences over the short and medium term depending on factors such as the housing market, economic climate, access to finance, and speed of construction.

A wide range of factors can influence the length of time it takes for a new private dwelling to be constructed, including the type of property (house, flat etc.), and the overall size of the site. Depending on the size of the site, the average time from start to completion of the entire site can range from anywhere between around 1.5 years to 2.75 years. Individual homes, or blocks of homes, might be completed in shorter timescales if parts of the site are completed in advance of the rest.

The figures have not been seasonally adjusted and so commentary tends to compare the latest 12-month period with the previous 12-month period, or the latest quarter with the same quarter in the previous year.

It should be noted that the amount of all-sector new housebuilding activity recorded in the quarters January to March 2020 and April to June 2020 will have been impacted by the introduction of measures to reduce the spread of the coronavirus (COVID-19) from mid-March to late June, in which non-essential construction activity stopped and home buyers were advised to delay moving to a new home where possible, after which there has been a phased re-start of supply activity.

Also note for housing association new build figures presented prior to April 2018 that approvals are used as a proxy for housing association new build starts due to data quality considerations in the historic series for starts.

A small number of local authorities have private and local authority-led new build data estimated due to delays in the provision of this data. These are:

- Aberdeen City, private-led starts and completions since 2023 Q2.

- East Dunbartonshire, private-led starts and completions since 2020 Q4.
- Dundee City, private-led starts and completions since 2023 Q1.
- South Ayrshire, private-led starts and completions since 2022 Q1.
- Stirling, private-led starts and completions since 2022 Q1.
- Na h-Eileanan Siar, private-led starts and completions since 2023 Q4.
- Aberdeen City, local authority led starts and completions since 2021 Q4.
- South Ayrshire, local authority led starts and completions since 2021 Q4.
- Stirling, local authority led starts and completions since 2023 Q4.

We are working with these local authorities to obtain these figures and aim to replace these estimates with actual figures in future publications.

As with previous publications, the estimates of private-led new build activity for local authorities with missing data are each based on an average of the preceding four quarters, with an adjustment made to account for different overall levels of construction activity seen in particular quarters, which is based on the aggregate trends from the local authorities who have provided data across the period in question.

Also as with previous publications, Highland starts data has been estimated since 2006 Q3, based on the completions data provided by the authority as an estimated level of contribution to national level new build housing starts.

Additional estimates have been made for local authority led new housebuilding starts and completions, as detailed above. As with previous estimates for local authority led new housebuilding figures, these estimates are based on separate starts and completions figures taken from the Scottish Government Housing and Regeneration Programme (HARP) system.

As with previous publications, Glasgow private-led figures for the period Q2 2020 to Q1 2022 have been based on data provided by Glasgow Council for all-sector figures across this period, from which we have derived the private-led component by netting off housing association starts and completions based on separate social sector new build figures taken from the Scottish Government Housing and Regeneration Programme (HARP) system. More recently provided quarters of data for the periods Q2 2022 onwards include a split for the private-led component of the data, and so figures presented across this period are now based directly on the data provided rather than through a netting off calculation.

A number of additional historic corrections provided by local authorities have also been made, for example where more up-to-date data for activity related to previous quarters has come to light, with further details on these changes available in the Excel webtables.

Further details of these revisions, along with the impact on national totals, are detailed in Tables R1a to R7b in the Supporting Charts and Tables Excel document.

Tell us what you think

We have streamlined this publication to make it easier to follow and to focus on the most recent key findings, whilst ensuring supporting Excel tables contain all the historic quarterly and annual data at both a Scotland and Local Authority level.

In previous versions on this publication, we had a UK House Price Index section, to enable us to understand the private sector building market whilst there was a lag in the private sector data. We have dropped the section relating to UK House Price Index (HPI) new build sales transactions, as a measure of private-led housebuilding activity, as the data in this publication on private led housebuilding is more comprehensive and no longer lagged.

We are always interested to hear from our users about how our statistics are used, and how they can be improved.

Feedback survey

We'd appreciate it if you would complete our short feedback survey on this publication.

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