RADYR & MORGANSTOWN LOCAL DEVELOPMENT GROUP

COMMENTS ON THE ADDITIONAL INFORMATION AND CHANGES TO THE RLDP

HEARING SESSION 1

1 We note the Edge Analytics 'Report, "Cardiff Demographics Evidence Addendum" displayed as Action Point HS1.5 confirms points we made in our note to the initial hearings in June 2026, i.e. the population projections based on past rates of international migration were too high. Further, the Mid Year Estimate for Cardiff for 2025 was lower than 2024 and lower than the WG projection of population by more than 5,000.

"Within the May 2026 Edge Analytics study, it was recommended that caution should be exercised in relation to the 2022-based WG Principal, High Population and Low Population scenarios, due to their dependence upon the unprecedented levels of international migration captured between 2021/22 and 2023/24.

"This recommendation has been reinforced by the revised MYE and the *significant*[1] drop in net international migration in 2024/25, as well as the differences between the MYE and the population projected by WG in its Principal projection between 2022 and 2025."[2]

2 However, we suggest that this report "pulls its punches" with regard to future international in-migration which all independent sources now indicate will fall to significant lows, especially given low demand from international students. As we stated in our Supplementary Submission to the Cardiff RLDP Examination (April 2026) analysing the 2022 WG projections in detail, the whole of this population increase over the 14 year period is forecast to come from net external inward migration. In fact, it is suggested that this will increase by 65,383 against outmigration to other parts of the UK of 33,851, 4052 people per annum from 2024 to 2035.

3 There are many factors which suggest that this decline in international migration shown in 2025 will continue and drop below the annual 4,052 figure. This will lead to a lower, perhaps much lower population projections for the years of the RLDP. Such changes are more important, perhaps than any changes which might come about from the impact of improved rates of household formation amongst young age groups as a result of concerns about concealed households.

4 For example, if the level of net external inward migration was half of that projected - 2026 per annum - this would lead to a reduction in the number of households by 2036 of over 9,000 meaning the housing target of 26,400 would be too high.[3] We would propose a low international migration scenario should be selected as a more appropriate basis for the population projections underpinning this RLDP.

We strongly suggest, therefore, that the RLDP provision for 24,000 houses plus 10% could well be an over provision and that there is certainly no need for further allocations at this stage.

4 We support the statement in Edge Analytics 'report that "caution should be applied to household projections". Perhaps it is sensible to await the production of the Strategic Development Plan for South East Wales before considering any further allocations of

housing land over and above that proposed by Cardiff Council in Revised figure 11: Summary of Housing Supply table. This plan should be available by 2031.

5 We note that that have been several changes to Figure 11 Summary Housing Supply Table resulting in a significant increase to the Net Housing Supply, which we support. In particular the Urban Capacity Study by Expedite has identified a number of sites within the Settlement Boundary which will provide an improved pool of potential large windfall sites for the remaining duration of the Plan.

6 We note also that revised figure 11 shows that housing completions for the period 1 April 2021 to March 2026 are 6,751, against a target of 10,355, shortfall of 35%; only 1,273 houses were completed in 2025-26 against a target of 2,071, a shortfall of nearly 40%.

7 In the light of this performance we repeat our comments from earlier this year: "it is difficult to take seriously projections of average build rates from 2025-6 to 2035-36 of over 2,200 with a peak of 2,751 in 2028-29.

"This will mean land already allocated in the current 2011-2026 LDP will remain undeveloped by 2036."[4]

8 We spoke on a number of occasions at the hearings in June of this year about the Cardiff Housing Market which is acknowledged to be wider that the boundaries of Cardiff Council, including Barry and the Eastern Vale, the southern parts of RCT and Caerphilly; perhaps even Newport. Housing markets do not follow local authority boundaries especially in a metropolitan area like Greater Cardiff and it is a weakness of the current planning system that the Cardiff RLDP has to be looked at in isolation. However, it has to take account of the plans and priorities of surrounding local authorities. We repeat our comments from earlier this year that, in total, the RLDPs are proposing 44,269 housing allocations until 2036/37[5] Many of these housing allocations will, from any viewpoint, be in the housing market that serves people working in Cardiff and will provide homes for many of Cardiff's population, especially given the higher average house prices in Cardiff, evidenced in the Avison Young report: Cardiff LDP Viability Testing.

30 October 2026

[1] Our italics
[2] Paragraphs 5.5 to 5.7 Cardiff Demographic Evidence Addendum Edge Analytics September 2026
[3] Using Edge Analytics household formation rate of 2.35
[4] Radyr & Morganstown Local Development Group : Supplementary Submission to the Cardiff RLDP Examination paragraph 10
[5] ibid paragraph 13 - the local authorities include Bridgend, Vale of Glamorgan, RCT, Caerphilly and Newport