Terra Strategic

Housing Land Supply Report

Greater Cambridge (Cambridge City and South Cambridgeshire)

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TETRA TECH

Tetra Tech, 4th floor, 1 Newhall Street, Birmingham, B3 3NH

Tetra Tech Consulting Limited. Registered in England: No.01470149
Registered Office: 101 Park Drive, Milton Park, Abingdon, Oxfordshire, England, OX14 4RY

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Prepared by	Prepared for
Tetra Tech	Terra Strategic

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1.0 Introduction

1.1 Tetra Tech ('TT') has been commissioned by Terra Strategic ('the client') to undertake an assessment of land supply position across Greater Cambridge, comprising Cambridge City and South Cambridgeshire. It assesses the Councils' latest published five-year housing land supply position, including the housing requirement, applicable buffer and assumptions regarding the deliverability of identified sites.

1.2 On the basis of this review, the report sets out an adjusted deliverable supply position for Greater Cambridge and identifies the implications for the councils' ability to demonstrate a minimum five-year supply of deliverable housing sites, both currently and upon adoption of the emerging Local Plan.

2.0 Deliverable Supply in Greater Cambridge

2.1 This section of the report considers the main findings form our assessment of the Councils' deliverable supply assumptions in the Greater Cambridge Housing Land Supply (April 2026). The analysis we have undertaken responds to the site schedules in Tables C2a, C2b, SC2a, SC2b, C3a, C3b, SC3a, SC3b, C4a, C4b, SC4a, SC4b, SC5, SC6a, and SC6b of that statement.

2.2 A full schedule of all assessed sites setting out our findings on deliverability is appended to this report (**Appendix A**).

2.3 We have carried our critique of the supply in accordance with the guidance on housing supply and delivery set out in planning practice guidance and the definition of deliverability west out in Annex D and the Glossary of the NPPF August 2026.

Area-wide analysis

2.4 We identified 17 sites (or parcels within larger sites) in the schedules where we dispute the Councils' deliverability assumptions.

2.5 Based on our analysis, we consider the deliverable supply should be reduced to 9,692 dwellings, resulting in a deduction of 3,722 dwellings across both authority areas. This is summarised in Table 5.1.

Table 2-1 Deliverable Supply in Greater Cambridge, 2026-31

LPA	TT	Disputed
13,414	9,692	3,722

Source: TT

2.6 We can also show how the respective supply is distributed across both authority areas. This is summarised in Table 5.2.

Table 2-2 Distribution of supply, by LPA, 2026-31

	Cambridge City	South Cambs	Greater Cambs
LPA	3,569	9,845	13,414
Tetra Tech	2,922	6,770	9,692
Disputed supply	**647**	**3,075**	**3,722**

2.7 We can see that a significant majority of the total disputed supply (83%) comes from sites located within South Cambridgeshire. Table 5.3 illustrates how this imbalance is split across the different categories within the trajectory. Similarly, the majority of disputed sites lie within South Cambridgeshire and comprise parts of the larger strategic allocations on the Cambridge Fringe, and new settlements in the District.

Table 2-3 Deliverable Supply, by location, 2026-31

Category	Council 5YHLS	TT 5YHLS	Discount	% of supply
Allocations within Cambridge Urban Area	807	304	503	6.0%
Allocations on Cambridge Fringe	4,500	2,914	1,586	33.5%
Allocations of New Settlements	5,165	3,820	1,345	38.5%
Allocations in Rural Area	362	362	0	2.7%
Unallocated Sites and Windfall Allowance	2,580	2,292	288	19.2%
Total	**13,414**	**9,692**	**3,722**	**100.0%**

Source: TT

2.8 This is mainly due to a lack of firm progress, in our view, on bringing forward phases of development with outline consent, or later phases with no consent in place, or due to factors relating to what we consider as optimistic projected delivery (build out) rates applied to certain sites or phases. Further detail on site-specific disputes in set out in Appendix A.

Disputed Sites

2.9 Table 5.4 lists the disputed sites within the South Cambridgeshire supply. These total 3,075 dwellings.

Table 2-4 Disputed Sites – South Cambridgeshire

Table ref	District	Site Name and Address	Council supply	TT supply	Discount
SC2a	South Cambridgeshire	North East Cambridge - Land north of Cambridge North Station	**425**	0	425
SC3a	South Cambridgeshire	North-West Cambridge (Eddington) - Future Lots	**897**	0	897
SC3a	South Cambridgeshire	Land between Huntingdon Road, Histon Road and the A14 (Darwin Green 2 / NIAB 2 and Darwin Green 3 / NIAB 3)	**420**	300	120
SC4a	South Cambridgeshire	Northstowe - phase 2: parcel 2A	**334**	0	334
SC4a	South Cambridgeshire	Northstowe - phase 2: remaining parcels, including 2C, TC1, C2 and 2F	**842**	448	394
SC4a	South Cambridgeshire	Northstowe - phase 3A	**114**	0	114
SC4a	South Cambridgeshire	Northstowe - phase 3B	**280**	150	130
SC4a	South Cambridgeshire	Waterbeach New Town - West: remaining parcels, including P3.1, P6.1, P6.2, P7.1, P7.2, P8.1, P8.2, P8.3, P9.1, P9.2, P10.1, P10.2, P11 and KP2	**718**	620	98
SC4a	South Cambridgeshire	Waterbeach New Town - East	**150**	0	150
SC4a	South Cambridgeshire	Bourn Airfield New Village	**500**	375	125

Table ref	District	Site Name and Address	Council supply	TT supply	Discount
SC6a	South Cambridgeshire	Wellcome Genome Campus, Hinxton	**333**	83	250
SC6a	South Cambridgeshire	Land to the south of North End, Meldreth	**38**	0	38
					3,075

2.10 The reasons for discounting these sites (in whole or in part) we see a reliance in South Cambridgeshire on future phases that haven't come forward yet, but where delivery on sites is nonetheless under way; notably Cambourne West, Northstowe, North-West Cambridge, and Waterbeach – West.

2.11 Table 5.5 lists those disputed sites in Cambridge.

Table 2-5 Disputed Sites - Cambridge

Table ref	District	Site Name and Address	Council supply	TT supply	Discount
C2a	Cambridge City	Henry Giles House, Chesterton Road	**38**	0	38
C2a	Cambridge City	Cambridge Professional Development Centre, Foster Road	**40**	0	40
C3a	Cambridge City	North-West Cambridge (Eddington) - Future Lots	**207**	0	207
C3a	Cambridge City	NIAB Main (Darwin Green) Land between Huntingdon Road and Histon Road: Land at NIAB, Huntingdon Road	**291**	0	291
C3a	Cambridge City	Cambridge East - north of Cherry Hinton: remainder, including RMA6	**139**	68	71
					647

2.12 Similarly, the reasons for disputing the Cambridge sites are broadly based on apparent lack of progress in bringing forward reserved matters applications, and the projected timeframe for delivery of those units (build out rate).

2.13 Set out below is a summary of the adjusted land supply calculation, taking into account the preceding analysis.

TT Adjusted Supply Position

2.14 Table 5.6 provides a summary position on land supply across Greater Cambridge, based on our analysis.

Table 2-6 Supply calculations based on different requirements

Stage	GC HLS, April 2026	TT (based on 12,054 requirement, 5% buffer)	TT (based on 12,879 requirement, plus 20% for Cambridge, and 5% for SC)	TT (based on 12,830 requirement, 20% / 5% buffer)
(a) Annual local housing requirement using standard method	2,296	2,296	2,296	2,289
(b) Five year requirement (= a x 5)	11,480	11,480	11,480	11,445
(c) buffer	574	574	1399.25	1,385
(d) Five year requirement with 5% buffer (= b + c)	12,054	12,054	12,879	12,830
(e) Council - dwellings predicted 2026-2031	13,414	9,692	9,692	9,692
(f) Council - five year supply (= e / d x 5)	**5.6**	**4.02**	**3.76**	**3.78**
Council - surplus / (shortfall) (= e - d)	1,360	-2,362	-3,187	-3,138

2.15 Our calculations show that whichever approach we use, based on our assessment of sites, we contend the deliverable supply is less than five years. When the current buffer is applied in Cambridge, the supply fall below four years.

2.16 On this basis, the Councils cannot demonstrate a minimum supply of deliverable sites, contrary to Policy HO3(1) of the NPPF. In our view, this also represents an evidenced unmet need in line with Policy S5(j).

Appendix A: Schedule of Disputed Sites

Table ref	District	Site Name and Address	COUNCIL 5YHLS 2026-2031	TT 5YHLS 2026-2031	Discount	Disputed?	Assessment status	TT site assessment	Basis / evidence
C2a	Cambridge City	Henry Giles House, Chesterton Road	**38**	0	38	Y	Discounted in full	Category B. The agent advises the site WILL BECOME AVAILABLE IN 2027/2028 because of existing leases; Telereal Trillium are developers and will bring the site forward themselves; and anticipates a planning application in 2027, construction start 2027/2028, first completions 2028/2029 and completion by 2030. There is still disagreement between the council and the applicant on build out rates. No house builder identfieid ot deliver the homes. Site will need to acquired and sold on the open market. No evidence that firm progress is being made towards a planning application. Site does not meet the NPPF definition. Remove in full.	LPA evidence Appendix C.33-35 and Response 7a
C2a	Cambridge City	Cambridge Professional Development Centre, Foster Road	**40**	0	40	Y	Discounted in full	Category B site. Site sis currntly owned by Cambridgeshire County Council, and is in temporary use (until 2028). No pre-application engagement, no application submitted, and developer timescales presented are only assertions and not supported by evidence. The prospective buyer (Cambridge City Council) indicates an application will be brought forward September 2027, contingent on the site being purchased September 2026 - with no evidence of a purchase, pre-application commitments, or any application currently before the Council to support this. Lichfields' Start to Finish (Sept 2024) shows an average planning approval period of 2.1 years for sites under 100 dwellings - meaning even if the site were purchased and an application submitted as indicated, permission would not realistically be secured until c.2029, before any build-out period is factored in. The scheme also involves removal of existing structures, adding further complexity and lead-in time beyond this baseline. With no application before the Council, no confirmed land purchase, and delivery contingent on multiple uncertain future events, it is unlikely the scheme could deliver within the five year period. Recommend removal from the five year supply.	LPA evidence Appendix C.61-66 and Response 11b
C3a	Cambridge City	North-West Cambridge (Eddington) - Future Lots	**207**	0	207	y	Discounted in full	Category B site. This site is the residual of a much larger site allocation under North West Cambridge Area Action Plan. Nonetheless, the wider allocation is being brought forward in phases and so the Council must demonstrate that every phase is deliverable in its own right. The remainder of the site had outline planning permission, but this has since lapsed. New Outline applications have been submitted (25/03746/OUT and 25/03753/OUT) in September 2025 for up to 3,800 dwellings, and other residential (older persons, students), non-residential uses, and site works. Both applications were approved by the Joint Development Management Committee on 16th September 2026. Nonetheless, there is still significant lead-in until first completions on the site, including submission and approval of all necessary reseved matters, legal agreements, discharge of conditions and enabling works. The Councils trajectory is unrealistic. We recommend delivery is pushed back by two years to broadly accord with 6 year lead-in from validation to first completions, consistent with Lichfields Start to Finish assumptions. Councils have also increased the expected delivery from 562 dwellings in the April 2025 assessment to 897 dwellings, with no evidence to support this. Also, no developers have been identfied or appointed to deliver the scheme or even progress the RM applications. Clear evidence not provided to demonstrate realistic propsects of delivery within the next five years. On balance, the site does not meet the deliverability definition in the NPPF. Remove in full. Discount 207 dwellings.	LPA evidence Appendix C.136-154 and Response 19d. Lichfelds Start to Finish.

C3a	Cambridge City	NIAB Main (Darwin Green) Land between Huntingdon Road and Histon Road: Land at NIAB, Huntingdon Road	**291**	0	291	Y	Discounted in full	Category A site. Permission 26/02606/FUL submitted 21 Jul 2026, no reserved matters. Lichfields' Start to Finish (Sept 2024) shows sites of 1,000+ dwellings take an average of 5 years to obtain detailed permission plus a further 1.3-1.6 years to first completion. As the scheme comprises apartments, units cannot be occupied prior to completion of the building. 291 dwellings in year one from a single parcel with no reserved matters is not supportable. Developer's own completions on adjoining plots do not match this rate: BDW2 - 119 by 31/12/25; BDW4 - 62 by 31/12/25 + 45 (107 in 2025-26); BDW5 & BDW6 - 211 by 31/12/25 + 35 (84 in 2025-26). Council's own peak benchmark for a 1,000-1,499 dwelling site is 150 dpa - less than half the claimed rate.	NPPF/LPA evidence Responses 20a, 20b, 20c, 20d (Barratt / David Wilson Homes), Lichfields' Start to Finish (Sept 2024) .
C3a	Cambridge City	Cambridge East - north of Cherry Hinton: remainder, including RMA6	**139**	68	71	y	Part discounted	Category B site. No application submitted for RMA6. Developer states pre-application discussions completed, RM anticipated early 2026, and a PPA is agreed with Bellway and Latimer including key milestones. 355 dwellings proposed, with first completions cited as 2028-2029. Whilst the evidence has progressed since the last position - from an "expectation of submission" to a PPA with agreed milestones and completed pre-application discussions. However, this remains a statement of intent rather than clear evidence of deliverability: there is still no application submitted, no reserved matters permission.	LPA evidence Appendix C.209-C.211 and Response 24d
SC2a	South Cambridgeshire	North East Cambridge - Land north of Cambridge North Station	**425**	0	425	y	Discounted in full	Category B site. Progress is being made in moving towards a planning application by appointing a development partner, however no details on the actual progress towards the RM applications have been presented in the Council's evidence. Only reference made to 'ongoing pre-application discussions' (C.116). Council has pushed back delivery by one year (from 2028/29 to 2029/30) indicating issues with progress. However, the Councils also set out in the Draft Greater Cambridge Local Plan that delivery of this allocation and vision is subject to alternative funding being found to enable the relocation of the Cambridge Waste Water Treatment Plant. The Councils will continue to review through the plan making process whether or not to carry forward this allocation into the new Local Plan (C.112). No alternatvie funding sources have been identfied to resolve this constraint. The cannot be delivered at this time. Not deliverable. Remnove in full. Discount by 425 dwellings.	LPA evidence Appendix C.111-116 and Appendix D Response 17.
SC3a	South Cambridgeshire	North-West Cambridge (Eddington) - Future Lots	**897**	0	897	y	Discounted in full	Category B site. This site is the residual of a much larger site allocation under North West Cambridge Area Action Plan. Nonetheless, the wider allocation is being brought forward in phases and so the Council must demonstrate that every phase is deliverable in its own right. The remainder of the site had outline planning permission, but this has since lapsed. New Outline applications have been submitted (25/03746/OUT and 25/03753/OUT) in September 2025 for up to 3,800 dwellings, and other residential (older persons, students), non-residential uses, and site works. Both applications were approved by the Joint Development Management Committee on 16th September 2026. Nonetheless, there is still significant lead-in until first completions on the site, including submission and approval of all necessary reseved matters, legal agreements, discharge of conditions and enabling works. The Councils trajectory is unrealistic. We recommend delivery is pushed back by two years to broadly accord with 6 year lead-in from validation to first completions, consistent with Lichfields Start to Finish assumptions. Councils have also increased the expected delivery from 562 dwellings in the April 2025 assessment to 897 dwellings, with no evidence to support this. Also, no developers have been identfied or appointed to deliver the scheme or even progress the RM applications. Clear evidence not provided to demonstrate realistic propsects of delivery within the next five years. On balance, the site does not meet the deliverability definition in the NPPF. Remove in full. Discount 897 dwellings.	LPA evidence Appendix C.136-154 and Response 19d. Lichfelds Start to Finish.

SC3a	South Cambridgeshire	Land between Huntingdon Road, Histon Road and the A14 (Darwin Green 2 / NIAB 2 and Darwin Green 3 / NIAB 3)	**420**	300	120	y	Part discounted	Category B site. Whilst only in outline, the site is under control of a national house builder (Barratt David Wilson) and a Planning Perfomance Agreement (PPA) is in place. However, the BORs do not align with local asumptions (Figure 6 of the April 2026 GC HLS). These assume 100 dpa where two outlets on sites of around 1,000 dwellings. Unlikely to be more than two outlets as BDW is effectively a single builder (David Wilson Homes is owned by Barratt). Even on this assumption, trajectory should assume 100 dpa across the period as a realistic projection. No evidence provided which substantiates the increase in delivery (140 dpa and 180 dpa) in subsequent years. Deduct 120 dwellings from the supply.	LPA evidence Appendix C.177-181 and Response 22. LIchfields Start to Finish
SC4a	South Cambridgeshire	Northstowe - phase 2: parcel 2A	**334**	0	334	y	Discounted in full	Category A site. Northstowe is a new settlement of up to 10,000 dwellings to the north west of Cambridge. Urban Splash, the original appicant/builder, have walked away. The master developer (Homes England) says a 'preferred bidder' has been identfiied and still anticipates that reserved matters planning applications for parcels 2A1 (190 dwellings) and 2A2 (110 dwellings) will be submitted in June 2025. However, no formal appointment of a new developer has been made since April 2025. On the basis of curret information, Phase 2A is stalled. It is not clear who or when the remainder of the extant RM application will be implemented, if at all, under the current RM approvals even though the site has commenced. There are considerable uncertainties regarding whether the current Strategic Collaboration Agreement for Phase 2A will be delivered in its current form. In any event, likely to be a single housebuilder, so we query the BOR for year 4 (144 dpa), which cannot be relied upon as HE are not going to build the homes. Adjust to 50 dpa for years 3-5, consistent with Figure 6 of the April 2026 statement. Clear evidence to demonstrate this site remains deliverable is not provided. Remove the phase 2A site in full. Deduct 334 dwellings.	LPA evidence Appendix C.240-247 and Appendix D Response 29
SC4a	South Cambridgeshire	Northstowe - phase 2: remaining parcels, including 2C, TC1, C2 and 2F	**842**	448	394	y	Part discounted	We accept that the wider Northstowe site is being delivered, including elements of Phase 2. However, no RM applications have been submitted for the remainder of phase 2 parcels. In the absence of any firm progress towards planning applications on these remaining parcels, the Council is relying on 'anticipated' estimates for lead-in and BORs provided by Homes England. There is a lack of clear evidence regarding progress towards any RM applications. On balance, the site is likely to deliver some homes in the next five years, however without any detailed proposals from the appointed developers, the trajectory is not realistic. To more accurately reflect the current posiiton, the trajectory for the remainder of Phase 2 should be pushed back by one year. Furthermore, no clear has bene presented twhich justifies the significant increase in BORs for years 4 and 5. We recommend that 150 dpa is appropriate at this time. Remove 394 dwellings from the supply.	LPA evidence Appendix C.253-265 and Response 29d
SC4a	South Cambridgeshire	Northstowe - phase 3A	**114**	0	114	y	Discounted in full	Category B site. The councils assume 114 dwellings are deliverable within the next five years. However, there is not evidence to substantiate this projection. No house builder has been appointed, which is unlikely to be until at least 2028 (see Response 30a in Appendix D). The master developer (Homes England) is ot a housebuilder but anticipates that a development partner for the first parcel of approximately 360 dwellings will be appointed in 2028 and that the reserved matters planning application for this parcel will be submitted in 2028 (see Response 30a in Appendix D). The master developer anticipates that construction will start on the first dwelling(s) on this first parcel within phase 3A in 2028/2029, that the first dwelling(s) on this parcel will be completed in 2029, and that this first parcel will be completed in 2036 (see Response 30a in Appendix D). These timeframes are unsubstantiated and unrealistic. Under these circumstances, proejcted delivery should be pushed back by two years as the site is clearly not deliverable based on current information.	LPA evidence C.266-291 Response 30
SC4a	South Cambridgeshire	Northstowe - phase 3B	**280**	150	130	y	Part discounted	Category B site. The councils assume 280 dwellings are deliverable within the next five years. However, there is not evidence to substantiate this projection. Whilst the councils say a Planning Performance Agreement is currently being negotiated with Homes England's preferred development partner, the master developer (Homes England) assumes there will be two outlets on the site (see Response 30b). This appears to be the justification for the inflated build out rates. The BORs are unsubstantiated and unrealistic. Under these circumstances, projected delivery should be based on a single outlet until such time as two outlets are confirmed. Reduce rates to 50 dpa consustent with Figrue 6 of the April 2026 statement. Deduct 130 dwellings from the supply.	LPA evidence C.266-291 Response 30b

SC4a	South Cambridgeshire	Waterbeach New Town - West: remaining parcels, including P3.1, P6.1, P6.2, P7.1, P7.2, P8.1, P8.2, P8.3, P9.1, P9.2, P10.1, P10.2, P11 and KP2	**718**	620	98	y	Part discounted	Category B sites. The remaining parcels relates to a larger site, which is currently under construction. A number of steps in the pre-construction process must be met prior to commencement/completions, all of which have not been submitted and / or approved at this time. The Councils had previously suggested in the April 2025 statement that completions would be expected during 2026/27, which would have meant commencement must occur during 2025/26. However, the April 2026 statement has pushed back the first completions date to year 2 (2027/28). Whilst these steps are outlined, no clear evidence of firm progress towards the RM application for any parts of Key Phase 2 has been presented to demonstrate that the projected timeframe will be achieved. No house builders have been appointed to deliver these parcels. Unclear who intends on building out the remaining parcels, or who the 5-7 outlets will comprise. This brings into serious question the expected BORs proposed. We suggest the 200 dpa applied the plan period supply should also be applied the five-year supply, given lack of certainty that 5-7 developers will come forward. On balance, these parcels are likely to deliver some homes, but it remains highly uncertain as to the quantum or timing. In order to deliver at th scale envisaged, the developers will need to be on site during 2027. This is far from certain. We recommend the trajectory is pushed back by one year, and 200dpa is applied until more detailed proposals are known. Deduct 98 dwellings from the supply.	LPA evidence Appendix C.333-340 and Response 33a.
SC4a	South Cambridgeshire	Waterbeach New Town - East	**150**	0	150	y	Discounted in full	Category B site. No House builder identified to delvier the sites. No certainty on timeframe for delivery of the link road, which is critical to the overall delivery of the site (see Response 34). Other significant infrastructure works are required prior to delivery of the homes, notably the relocation of the railway station. No RM applications and no clear evidence of firm progress towards any RM applications . Site does not meet the NPPF definition of deliverable. Remove in full.	LPA evidence Appendix C.341-346 and Resposne 34
SC4a	South Cambridgeshire	Bourn Airfield New Village	**500**	375	125	y	Part discounted	Category B site. No Housebuilder appointed or confirmed. No clear evidence of firm progress towards a RM application for the housing element. Housing is dependent on infrastructure works, which have not been approved. Pre-commencement conditions are bieng discharged. The site may come forward as anticipated, but not deliverable at the base date (1 April 2026). Push back deliery by one year to account for current uncertanties. Deduct 125 dwellings from the supply.	LPA evidence Appendix C.350-360 and Resposne 35
SC6a	South Cambridgeshire	Wellcome Genome Campus, Hinxton	**333**	83	250	y	Part discounted	Category A site. Evidence does not support the inclusion of 333 dwellings in the supply. Only 83 dwellings are subject to a RM application 24/02106/REM , and so only this element can be considered deliverable. Justification provided for the additional supply is inadequate. No RM applications and no clear evidence of firm progress towards any RM applications . Site does not meet the NPPF definition of deliverable. Remove 250 dwellings from the supply.	LPA evidence Appendix C.567-569 and Response 76
SC6a	South Cambridgeshire	Land to the south of North End, Meldreth	**38**	0	38	y	Discounted in full	Category B site. Proposals involve redevelopment of turkey farm. No Housebuilder appointed or confirmed. Resolution to grant, subject to s106 agreement, not yet been signed. No clear evidence of firm progress towards a RM application. Site does not meet the NPPF definition of deliverable. Remove 38 dwellings from the supply.	
					3722				