



Llywodraeth Cymru
Welsh Government

Housing Land Availability in Wales

Summary for 2016

July 2017

HOUSING LAND AVAILABILITY IN WALES – SUMMARY FOR 2016

In order to ensure that sufficient land is brought forward for housing development, the Welsh Government's planning policy requires local planning authorities in Wales to identify specific, deliverable sites for the following five year period and to review this position on an annual basis through the preparation of a Joint Housing Land Availability Study (see *Planning Policy Wales*, paragraph 9.2.3). The Studies have a common base date of 1st April.

The process and the methodology for undertaking a Joint Housing Land Availability Study (JHLAS) are set out in Technical Advice Note 1 (TAN 1). The assessment of housing land availability is based on the housing requirements identified in adopted development plans. Therefore only those local planning authorities with an adopted Local Development Plan (or an adopted Unitary Development Plan that is still within its plan period at the base date of the Study) are able to carry out a JHLAS.

This summary presents information on the overall results from the 2016-based JHLASs from local planning authorities. The housing land supply position for each authority over the five-year period 2012 – 2016 is also provided.

Summary

- The 2016 Studies show that as at 1 April 2016 19 out of the twenty-five local planning authorities were unable to demonstrate a five year housing land supply.
- By comparison, 17 local planning authorities were unable to demonstrate a five year housing land supply in 2015, all of which remain without a five year supply in 2016.
- 16 local planning authorities have had less than five years housing land supply for three or more consecutive years.
- Four local planning authorities were unable to undertake a Joint Housing Land Availability Study as they did not have either an adopted Local Development Plan or an adopted Unitary Development Plan which was still within its plan period at 1 April 2016. As a result these authorities are considered to have '0' years housing land supply.

The figures for 2016 show that housing land supply as reported in JHLASs has declined for many LPAs, including for some with recently adopted Local Development Plans (LDPs). Research commissioned by the Welsh Government (*Longitudinal viability study of the planning process* undertaken by Arcadis (UK) Ltd) indicates that one of the main reasons is the allocation of sites for housing which are essentially undeliverable or only likely to come forward at later stages of the LDP period. Viability was identified as a key reason for delays in delivery, covering issues such as affordable housing

requirements, sites being located in low value market areas, poor quality sites or specific infrastructure requirements. The research makes a number of recommendations for addressing these issues, which are under consideration.

The housing land supply figures, collated from the individual published Studies for each authority, are set out in the table below.

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Local Planning Authority	Housing Land Supply ¹ (in years)				
	2012	2013	2014	2015	2016

Isle of Anglesey	<i>5.8</i>	<i>5.4</i>	<i>4.6</i>	0	0
Gwynedd	4.8	4.5	3.6	3.3	2.9
Conwy	<i>4.0</i>	<i>4.1</i>	<i>4.8</i>	4.0	3.7
Denbighshire	3.5	3.5	1.8	2.1	2.0
Flintshire	4.5	4.1	3.7	- ²	0
Wrexham	3.5	3.4	3.1	0	0
Powys	4.1	3.4	1.5	1.9	2.2
Ceredigion	5.3	6.5	3.7	3.3	3.4
Pembrokeshire	4.3	4.9	5.3	5.0	5.1
Carmarthenshire	4.1	5.3	4.9	3.7	4.1
Swansea	5.1	3.3	2.7	3.0	3.2

¹ Figures in *italics* indicate that the housing land supply was calculated using the past building rates methodology. This methodology is no longer permissible from the 2015 studies onwards under the revised TAN 1 (January 2015) because it is based on the past performance of the house-building industry rather than the housing provision set out in an adopted plan.

² Flintshire failed to complete their 2015 Study before the base date of the 2016 studies.

Local Planning Authority	Housing Land Supply (in years)				
	2012	2013	2014	2015	2016

Neath Port Talbot	6.0	2.6	2.5	5.5 ³	5.0
Bridgend	5.1	5.7	6.0	5.4	5.1
Vale of Glamorgan	3.3	4.4	7.3	0	0
Cardiff	2.9	3.2	3.6	5.2 ⁴	3.8
Rhondda Cynon Taf	4.5	3.7	2.8	2.4	1.5
Merthyr Tydfil	3.6	2.9	2.5	2.8	1.6
Caerphilly	3.5	2.9	2.5	1.9	1.5
Blaenau Gwent	7.6	3.3	2.6	2.0	1.3
Torfaen	6.3	6.6	4.7	4.8	3.6
Monmouthshire	4.4	3.6	5.2	5.0	4.1
Newport	7.0	7.4	9.2	6.3	5.9
Snowdonia National Park	9.3	9.5	8.3	7.0	5.4
Brecon Beacons National Park	1.9	1.3	5.5	5.8	5.0
Pembrokeshire Coast National Park	3.5	3.0	2.7	1.8	2.0

³ Neath Port Talbot's housing land supply figure for 2015 is based on their LDP (adopted on 27 January 2016) as this superseded their 2015 JHLAS.

⁴ Cardiff's housing land supply figure for 2015 is based on their LDP (adopted on 28 January 2016).