



Llywodraeth Cymru
Welsh Government

Housing Land Availability in Wales

Summary for 2017

January 2018

HOUSING LAND AVAILABILITY IN WALES – SUMMARY FOR 2017

In order to ensure sufficient land is brought forward for housing development to meet the needs of local communities in Wales, the Welsh Government's planning policy requires local planning authorities to identify specific, deliverable sites for the following five year period and to monitor 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 Joint Housing Land Availability Study (JHLAS) process informs Local Development Plan (LDP) policies and land allocations, provides key information for monitoring the effectiveness of LDPs and can be a reason to review an LDP. Failure to have a five-year housing land supply is also an important material consideration which should be taken into account by local planning authorities in determining applications for residential development and by Planning Inspectors when determining appeals.

The process and the methodology for undertaking a JHLAS are set out in Technical Advice Note 1 (TAN 1). The assessment of housing land availability is based on the housing requirements identified by local planning authorities in their adopted development plans. Therefore only those local planning authorities with an adopted LDP (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 and demonstrate whether they have a five-year supply of land for housing.

This summary presents information on the overall results from the 2017-based JHLASs from local planning authorities. The housing land supply position for each authority over the five-year period 2013 – 2017 is also provided.

Summary

- The 2017 Studies show that as at 1 April 2017 19 out of the twenty-five local planning authorities were unable to demonstrate a five-year housing land supply.
- This is the same position as at 1 April 2016 when 19 local planning authorities were also unable to demonstrate a five-year housing land supply. 16 of these authorities remain without a five-year supply in 2017.
- 14 local planning authorities have had less than five years housing land supply for three or more consecutive years.
- Seven local planning authorities were unable to undertake a JHLAS as they did not have either an adopted LDP or an adopted Unitary Development Plan which was still within its plan period at 1 April 2017. However, three of these authorities (Anglesey / Gwynedd and Vale of

Glamorgan) adopted their LDPs during 2017 and their housing land supply figures are therefore based on their LDPs. The other four authorities are considered to have '0' years housing land supply (Flintshire, Wrexham, Powys and Swansea).

The figures for 2017 show that housing land supply as reported in JHLASs remains an issue for many local planning authorities, including for some with recently adopted LDPs. Research carried out in 2016/17¹ demonstrates that viability is a key reason for delays in sites coming forward for development, covering issues such as affordable housing requirements, sites being located in low value market areas, poor quality sites or specific infrastructure requirements. Another main reason for delays in delivery identified by the research is the allocation of sites for housing which are essentially undeliverable or only likely to come forward at later stages of the LDP period. The research also identified that landowners and developers appear to be contesting sites through the JHLAS process and stating they are not economically viable and deliverable to build due to a number of factors such as affordable housing policies, legislation and regulations. This situation has resulted in lower than expected delivery rates on sites allocated in LDPs and is clearly having a detrimental effect on housing land supply across Wales. The research highlights the need for a more rigorous assessment of sites prior to allocation in LDPs and for increased engagement in the process on the part of landowners and developers. The relevant recommendations from the research are being taken forward as part of the current reviews of *Planning Policy Wales* and the *Development Plan Manual*.

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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¹ *Longitudinal viability study of the planning process*, February 2017, undertaken for the Welsh Government by Arcadis (UK) Ltd
(<http://gov.wales/topics/planning/planningresearch/publishedresearch/longitudinal-viability-study-of-the-planning-process/?lang=en>).

Housing Land Supply 2013 - 2017

Local Planning Authority	Housing Land Supply ² (in years)				
	2013	2014	2015	2016	2017

Isle of Anglesey	<i>5.4</i>	<i>4.6</i>	0	0	5.4 ³
Gwynedd	<i>4.5</i>	<i>3.6</i>	3.3	2.9	
Conwy	<i>4.1</i>	<i>4.8</i>	4.0	3.7	3.1
Denbighshire	<i>3.5</i>	<i>1.8</i>	2.1	2.0	1.8
Flintshire	<i>4.1</i>	<i>3.7</i>	- ⁴	0	0
Wrexham	<i>3.4</i>	<i>3.1</i>	0	0	0
Powys	<i>3.4</i>	<i>1.5</i>	1.9	2.2	0
Ceredigion	<i>6.5</i>	<i>3.7</i>	3.3	3.4	2.6
Pembrokeshire	<i>4.9</i>	<i>5.3</i>	5.0	5.1	5.1
Carmarthenshire	<i>5.3</i>	<i>4.9</i>	3.7	4.1	4.2
Swansea	<i>3.3</i>	<i>2.7</i>	3.0	3.2	0
Neath Port Talbot	<i>2.6</i>	<i>2.5</i>	5.5 ⁵	5.0	5.3
Bridgend	<i>5.7</i>	<i>6.0</i>	5.4	5.1	4.0
Vale of Glamorgan	<i>4.4</i>	<i>7.3</i>	0	0	6.1 ⁶

² 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.

³ Figure based on the Anglesey / Gwynedd Joint LDP adopted on 31 July 2017.

⁴ Flintshire failed to complete their 2015 Study before the base date of the 2016 studies.

⁵ 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.

⁶ Figure based on the Vale of Glamorgan LDP adopted on 28 June 2017.

Local Planning Authority	Housing Land Supply (in years)				
	2013	2014	2015	2016	2017

Cardiff	3.2	3.6	5.2 ⁷	3.8	3.6
Rhondda Cynon Taf	3.7	2.8	2.4	1.5	1.3
Merthyr Tydfil	2.9	2.5	2.8	1.6	1.6
Caerphilly	2.9	2.5	1.9	1.5	2.1
Blaenau Gwent	3.3	2.6	2.0	1.3	1.3
Torfaen	6.6	4.7	4.8	3.6	3.6
Monmouthshire	3.6	5.2	5.0	4.1	4.0
Newport	7.4	9.2	6.3	5.9	6.1
Snowdonia National Park	9.5	8.3	7.0	5.4	3.6
Brecon Beacons National Park	1.3	5.5	5.8	5.0	4.8
Pembrokeshire Coast National Park	3.0	2.7	1.8	2.0	1.2

⁷ Cardiff's housing land supply figure for 2015 is based on their LDP (adopted on 28 January 2016).