

Background paper – Summary of the Reported Impacts on Development due to SAC-related Stoppages

Marine Nitrates Development Taskforce 1st meeting, 25 September 2025

Summary of Total Impacts across 3 returns

- 421 live planning applications
- 3,874 homes affected
- 1,295 affordable homes affected
- Social Housing Grant drawdown of £99m (with a further £98.9m Swansea)
- The letters all set out wider impacts on the LDP, future LDP proposals, and direct or indirect jobs.
- All three letters set out immediate and future resourcing challenges as a result

(Subsequent correspondence from Council Leaders, dated 22 September, quotes 11,800 dwellings at risk, of which 2,300 are affordable, and 10,000 direct jobs in Carmarthen and Swansea alone.)

Headlines from Pembrokeshire return:

- 200 live planning applications affected, including 50 housing applications.
- 600 new homes at risk, of which 220 are affordable homes.
- 200 affordable homes funded by Social Housing Grant (SHG) jeopardised, representing £25 million of social housing investment.
- 2,236 units in our replacement Development Plan (LDP2) fall within the affected catchment.
- “Thousands” of direct and indirect jobs at risk.
- Resourcing posts: Consultancy/guidance; Nutrient Officer and Planning Ecologist – approx. £394,000

Headlines from Carmarthenshire return:

- 71 live planning applications
- 1,124 residential units
- 80 direct jobs
- 525 affordable homes (260 Local Authority / 265 Registered Social Landlord) representing SHG of £45million
- Resourcing posts: Mitigation Guidance; Nutrient and Nature Capital Officer; Nutrient Ecologist - £395,000

Headlines from Swansea return:

- 150 live planning applications
- 2,150 dwellings at risk
- 570 of those affordable
- SHG Main PDP and Priority Reserve – 408 homes representing SHG of £39million
- PDP Remaining Reserve – 515 affordable, £98.8m SHG
- LDP allocations 4,870 dwellings / 1,010 affordable
- 4,500-5,500 jobs
- LDP2 – 5,000 homes
- Notes the need for additional resources but no costs associated with those at this stage

The Pembrokeshire return also sets out proposed or live workstreams in response:

Workstream 1: Developer local mitigation guide/handbook (Deadline: within 2-3 months of contract start)

Delivered by Consultants

- SPG-ready document providing step by step guidance on DIN mitigation for estuarine/marine SACs.
- Mitigation measures relevant to development, including SuDS.
- Method for calculating nitrogen load and saving and demonstrating neutrality.
- Trigger criteria for when mitigation is required.
- Future option to develop compensatory measures guide relevant to development

Work stream 2: Strategic Mitigation Opportunities (Deadline: within 3-6 months)

Delivered by Consultants, LDP Team and Property

- Complete a Natural Capital Accounting process on the county farm estate and wider Council land holding within the affected catchment to identify where, what type of mitigation and when it could be applied for multiple benefits.
- Calculate the nitrogen savings of the mitigation plans created through the Building Natural solutions work that was based on phosphorus.
- Identify mechanism(s) for how strategic mitigation can be secured for future land supply.

Workstream 3: Develop a local nutrient credit trading system (Deadline: 6 months)

Delivered by Consultants with input from relevant officers

- Consider the infrastructure / PCC policy support for nutrient trading or wider market-based mechanisms that could include Net Benefit for biodiversity.
- Consider how these could be used for more than enabling development and how they could accept funds to get the designated bodies of water into good environmental status.
- Assistance with setting up an operational trading system or opportunity to link into a future national/regional system.
- Scope out the ongoing operational requirements to manage and monitor such a system.