



Llywodraeth Cymru
Welsh Government

Housing Land Availability in Wales

Summary for 2018

January 2019

HOUSING LAND AVAILABILITY IN WALES – SUMMARY FOR 2018

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*, Edition 10, paragraph 4.2.15). 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 a shortfall in housing land supply can be a reason to review an LDP. Failure to have a five-year housing land supply can also be a material consideration to be taken into account in determining applications or appeals for residential development.

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 2018-based JHLASs from local planning authorities. The housing land supply position for each authority over the five-year period 2014 – 2018 is also provided.

Summary

- The 2018 Studies show that as at 1 April 2018 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 2017, with 18 of the same authorities remaining without a five-year supply in 2018.
- 15 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 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 2018. However, one of these authorities (Powys) adopted their LDP during 2018 and their housing land supply figure is therefore based on their LDP. The other three

authorities are considered to have '0' years housing land supply (Flintshire, Wrexham and Swansea).

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

The figures for 2018 show that housing land supply as reported in JHLASs remains an issue for many local planning authorities, highlighting a shortfall in 'deliverable' land.

Research carried out in 2016/17¹ demonstrated that viability is a key reason for delays in sites coming forward for development. The research also identified that another reason for delays in delivery is the allocation of sites for housing which are essentially undeliverable or only likely to come forward at later stages of the LDP period. This situation has resulted in lower delivery rates than originally anticipated by local planning authorities and site promoters on sites allocated in LDPs, and is clearly having a detrimental effect on housing land supply across Wales.

In response to the findings of this research, revisions have been made to *Planning Policy Wales* to require more rigorous assessments of sites prior to allocation in LDPs. Resulting from this approach, *Planning Policy Wales* also states that it should not be necessary for viability issues for allocated sites to be assessed further at the planning application stage where the proposed development complies with LDP policy requirements, unless there are exceptional circumstances.

The Welsh Government has also begun a wide-ranging review of the delivery of housing through the planning system. This review commenced in July with a 'call for evidence'. The further stages of the review will be agreed following completion of the analysis of the responses to the 'call for evidence'.

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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 2014 - 2018

Local Planning Authority	Housing Land Supply ² (in years)				
	2014	2015	2016	2017	2018

Isle of Anglesey	4.6	0	0	5.4 ³	6.3
Gwynedd	3.6	3.3	2.9		
Conwy	4.8	4.0	3.7	3.1	3.1
Denbighshire	1.8	2.1	2.0	1.8	1.6
Flintshire	3.7	0 ⁴	0	0	0
Wrexham	3.1	0	0	0	0
Powys	1.5	1.9	2.2	0	7.0 ⁵
Ceredigion	3.7	3.3	3.4	2.6	2.2
Pembrokeshire	5.3	5.0	5.1	5.1	4.5
Carmarthenshire	4.9	3.7	4.1	4.2	3.8
Swansea	2.7	3.0	3.2	0	0
Neath Port Talbot	2.5	5.5 ⁶	5.0	5.3	5.0
Bridgend	6.0	5.4	5.1	4.0	3.4
Vale of Glamorgan	7.3	0	0	6.1 ⁷	5.6

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 Figure based on LDP (adopted on 17 April 2018).

⁶ Figure based on LDP (adopted on 27 January 2016).

⁷ Figure based on LDP (adopted on 28 June 2017).

Local Planning Authority	Housing Land Supply (in years)				
	2014	2015	2016	2017	2018

Cardiff	3.6	5.2 ⁸	3.8	3.6	3.5
Rhondda Cynon Taf	2.8	2.4	1.5	1.3	1.4
Merthyr Tydfil	2.5	2.8	1.6	1.6	1.1
Caerphilly	2.5	1.9	1.5	2.1	2.3
Blaenau Gwent	2.6	2.0	1.3	1.3	1.3
Torfaen	4.7	4.8	3.6	3.6	3.9
Monmouthshire	5.2	5.0	4.1	4.0	3.9
Newport	9.2	6.3	5.9	6.1	5.6
Snowdonia National Park	8.3	7.0	5.4	3.6	3.0
Brecon Beacons National Park	5.5	5.8	5.0	4.8	3.9
Pembrokeshire Coast National Park	2.7	1.8	2.0	1.2	1.4

⁸ Figure based on LDP (adopted on 28 January 2016).