

# UWE Bristol

## The availability of brownfield land for housing in England

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UK-Ireland Planning Research Conference, Future Planning, Future Cities  
9-11<sup>th</sup> September 2015, London South Bank University

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# Background

- Housing 'crisis'
- Household formation rate of 221,000 households per year but only around 112,000 homes are being built
- Political agreement that legacy of under-supply must be reversed
- But where should these new homes be created?
- Arguments in favour of both brownfield and greenfield
- But essential to understand the feasibility of different options and their implications
- The focus of this study is brownfields

# What are brownfields (or Previously Developed Land)?

'Land which is or was occupied by a permanent structure, including the curtilage of the developed land (although it should not be assumed that the whole of the curtilage should be developed) and any associated fixed surface infrastructure. This excludes:

- Land that is or has been occupied by agricultural or forestry buildings
- Land that has been developed for minerals extraction or waste disposal by landfill purposes where provision for restoration has been made through development control procedures
- Land in built-up areas such as private residential gardens, parks, recreation grounds and allotments
- Land that was previously developed but where the remains of the permanent structure or fixed surface structure have blended into the landscape in the process of time' (DCLG, 2012, p.61).

# Brownfield policy

- Pre-2010 strong and clear 'brownfield first' message since 1990s
- 53% of homes built on brownfields in 1990 increased to 81% in 2008
- But still not enough to meet demand
- Since 2010 move away from 'brownfield first'
- Brownfield reuse is encouraged but there has been an increase in greenfield development (32% in 2011)
- Harder for local planning authorities to prioritise brownfields
- But still not enough to meet demand
- Renewed interest in brownfields

# Rationale

- Conflicting estimates of how much brownfield is available
- Capacity estimated at 200,000 and 1.5 million homes by Government
- Is there enough to meet demand in the areas that it is needed?
  
- Commissioned by the Campaign to Protect Rural England, to understand:
  - How much urban brownfield land is available for housing?
  - Where is it?
  - What is working, or not working, to bring it forward for development?

# Our approach

- **Analysis of the most recent National Land Use Database**
- Case study analysis of seven local authorities and their approach to brownfield development
- Policy and literature analysis to examine the barriers and drivers to brownfield development
- Expert Symposium to explore the findings in more detail
- Recommendations

# National Land Use Database

- Until 2010 LAs reported annually to the National Land Use Database for Previously Developed Land (NLUD-PDL)
- Reporting requirement removed in 2010
- Surveyed all LAs in England: asked to provide the equivalent of their NLUD data from 2011, 2012 and 2013
- 82% of LAs responded
- 34% of LAs provided data for 2011 and/or 2012
- 9% of LAs provided data for 2013
- 2010 data used where 2011 and/or 2012 data were not available

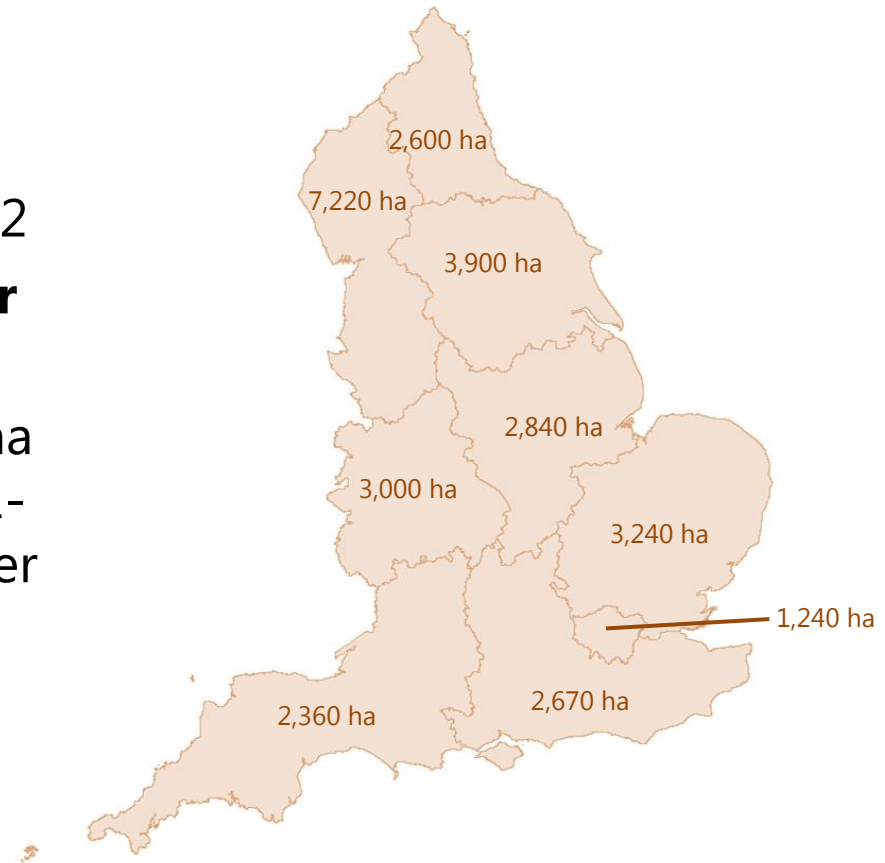
# National Land Use Database

- NLUD provides five categories of 'brownfield':
  - A. Previously developed land (PDL) now vacant**
  - B. Vacant buildings**
  - C. Derelict land and buildings**
  - D. Previously developed land or buildings currently in use and allocated in local plan or with planning permission**
  - E. Land currently in use with known redevelopment potential but no planning allocation or permission
- Calculated the amount of land available, type of land, planning status, suitability for housing and housing capacity for each region
- Data taken at face value



# How much brownfield land?

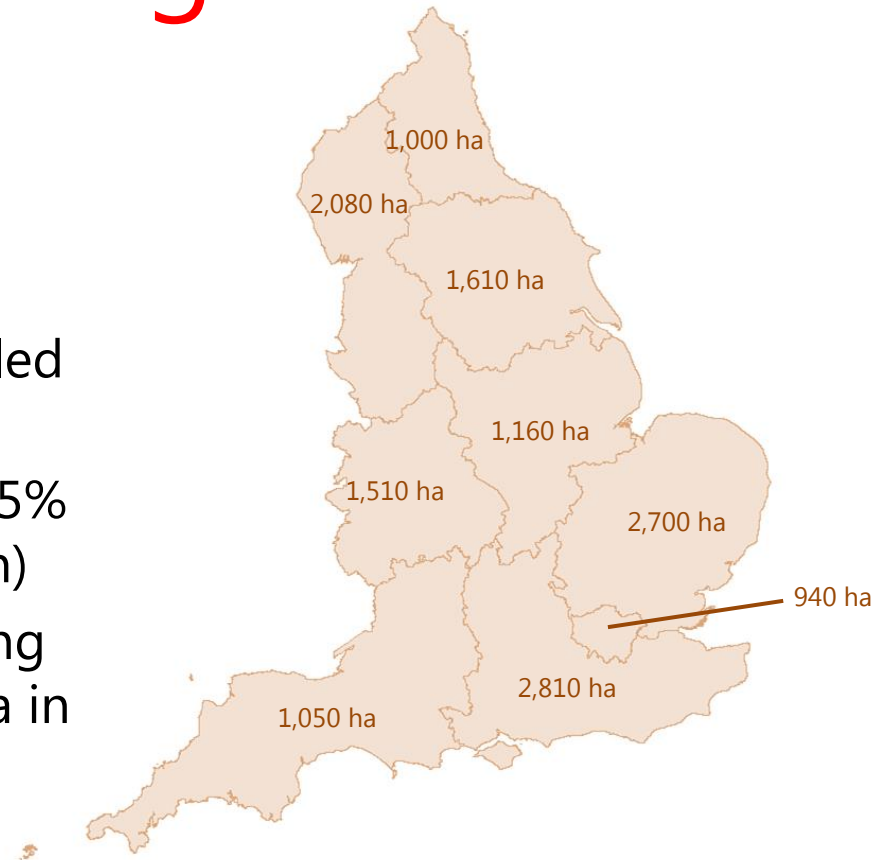
- Approximately **45,000 ha** of brownfield land in England in 2012
- Around **29,000 ha** were **vacant or derelict sites (65%)**
- Majority of sites were less than 1ha in size (71%), with 22% between 1-5 ha, 6% 5-20 ha, and only 1% over 20 ha
- Government figures estimated an area of 37,940 ha in 2010



Total area of vacant and derelict PDL in 2012 by English region. Contains public sector information licensed under the Open Government Licence v3.0.

# What is the planning status?

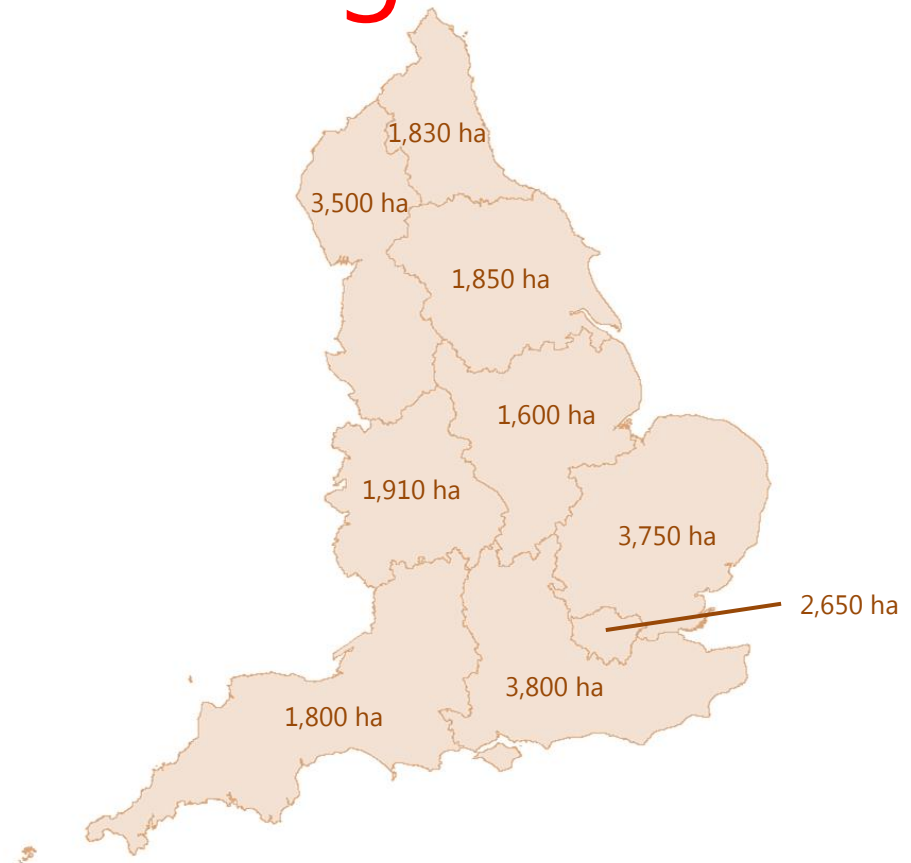
- Approximately **18,000 ha** (40%) were allocated or had draft allocation in the Local Plan
- **14,850 ha** (33%) had either detailed or outline planning permission
- 73% of land was developable ( $\approx 65\%$  in South West to  $\approx 85\%$  in London)
- Ranging from 940 ha with planning permission in London, to 2,810 ha in the South East



Total area of brownfield with outline or detailed planning permission in 2012 by English region. Contains public sector information licensed under the Open Government Licence v3.0

# Is it suitable for housing?

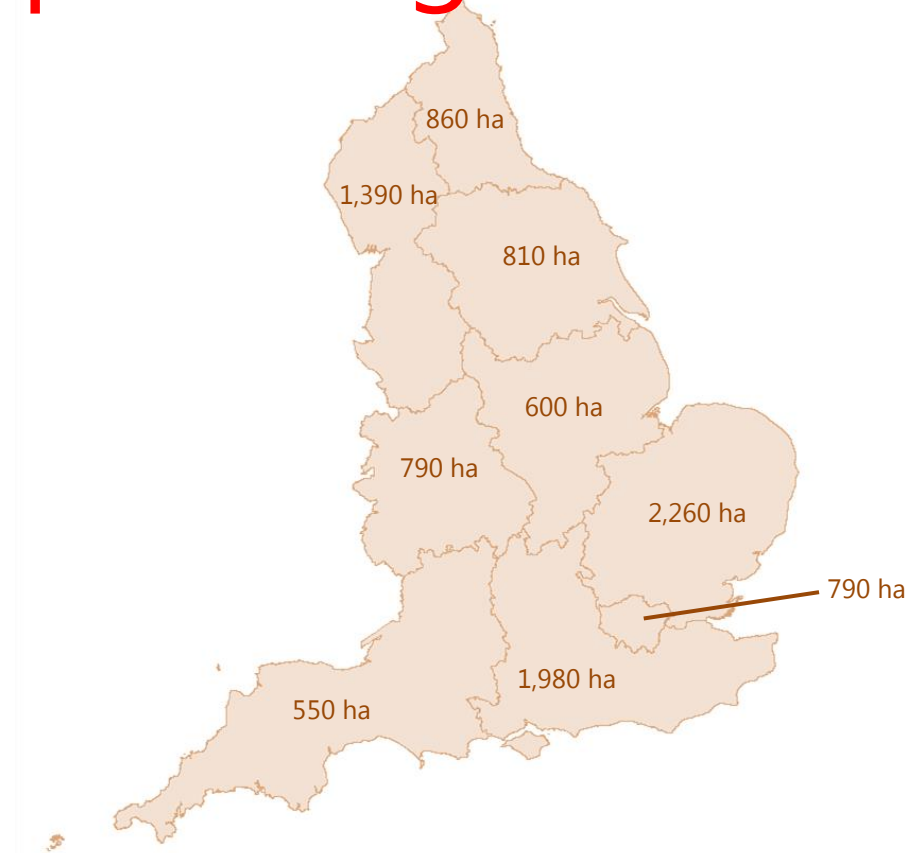
- Approximately **22,700 ha** of brownfield land were suitable for housing (52%)
- The proportion suitable for housing has increased from 48% since 2010
- 56% is vacant or derelict
- Regional variations with 81% of land suitable for housing in London, and only 36% in Yorkshire and the Humber



Total area of PDL suitable for housing in 2012 by English region. Contains public sector information licensed under the Open Government Licence v3.0

# And what is the planning status?

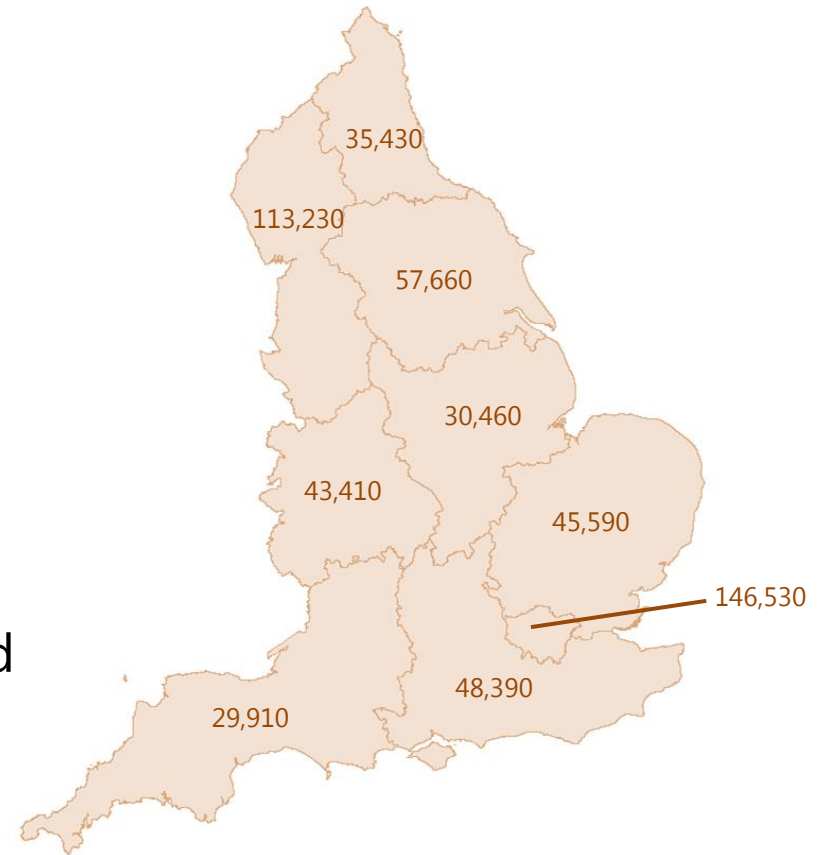
- 85% of land judged suitable for housing had some form of planning status
- Approximately **10,000 ha** with outline or detailed planning permission
- Around **8,500 ha** allocated or with draft allocation in the Local Plan
- Considerable provision in London and the South East



Total area of publicly identified PDL suitable for housing with outline or detailed planning permission in 2012 by English region. Contains public sector information licensed under the Open Government Licence v3.0.

# How many homes is this?

- Capacity for **975,991 homes in England** on brownfield land
- Over four years' supply
- **550,000** homes on sites that are already **vacant and derelict**
- Almost half (44%) are in the South East, East of England or London
- Around 406,000 homes with detailed or outline planning permission; 106,000 in London, 45,000 in South East and 45,000 in East of England.



Total housing capacity on vacant and derelict PDL in 2012 by English region. Contains public sector information licensed under the Open Government Licence v3.0.

# Detailed analysis

- **Stalled sites:** these sites are identified for development, and have planning permission and other planning agreements in place (i.e. are 'shovel ready'), but are not being actively developed at present.
- **Hardcore sites:** these sites are difficult to develop, usually because of site conditions and/or poor market conditions (low demand). They were classified by English Partnerships as sites that have been undeveloped for nine years or more.
- **Sites under development:** these sites are actively being developed but are not yet figuring in housing completions data. **The churn or continual replenishment.**

# The churn

- 82 LAs provided NLUD data for both 2011 and 2012
- 2010 to 2011:
  - 2,653 ha removed from NLUD and 2,591 ha added (18% turnover; 62 ha decrease)
  - 1,052 ha identified as suitable for housing removed from NLUD and 979 ha added (17% turnover; 73 ha decrease)
- 2011 to 2012:
  - 1,949 ha removed from NLUD and 1,501 ha added (around 12% turnover; 449 ha decrease)
  - 606 ha identified as suitable for housing removed from NLUD and 746 ha added (around 12% turnover, 140 ha increase)

# Hardcore sites

- Around 17,740 ha (5,114 sites) classified as 'hardcore' in 2012 (39%)
- Considerable regional variation ranging from only 9 ha across 6 sites in London to 4,169 ha across 1,027 sites in the North West
- Number of hardcore sites has increased since 2010
- But 4,460 ha (25%) had some form of planning permission in 2012
- Approximately 6,280 ha (35%) of hardcore sites were suitable for housing
- Around 23,350 ha of non-hardcore sites suitable for housing, 12,630 ha of which are on vacant or derelict PDL



# Conclusions

- There is enough brownfield land to meet housing needs for at least four years, even if no new land comes forward
- Brownfields are being replenished so do not seem to be running out
- The majority of sites are relatively small (71% at less than 1 ha)
- There is enough with planning permission for over 400,000 homes
- Some questions:
  - is the Government's ambition is too modest?
  - is planning really is a barrier to brownfield development?
  - will the Government's approach to stimulate brownfield development via LDOs be effective?
- Three inter-related 'conditions' have to be right: market conditions; planning and regulatory conditions; and site conditions

# Key recommendations

- Reintroduce a clear and consistent 'brownfield first' approach
- Give the Homes and Communities Agency (HCA) greater powers and resources to develop large and difficult sites
- Provide more direct funding for difficult 'hardcore' sites
- Develop a proactive approach to identifying brownfield land
- Encourage local communities to identify brownfield sites
- Reintroduce mandatory reporting to the NLUD
- Make NLUD data publicly available and in a more accessible form
- Provide assistance to smaller builders by identifying smaller sites and offering incentives for development

<http://cpre.org.uk/housing-and-planning/housing/item/download/3847>.

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## FROM WASTED SPACE TO LIVING SPACES

### The availability of brownfield land for housing development in England

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NOVEMBER 2014



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